

If the PI is going to become someone already listed on the Research Team, follow Steps 1-6

If the PI is not currently listed on the Research Team, skip to Step 3

- 1. Make a note of the edit permission and responsibilities each person has listed in their researcher details
  - In the example below, PI Paula will need to be the new PI. Her current responsibilities are to Consent Subjects.
  - The existing PI, Jane Smith has Other as her current responsibilities.

<ul> <li>Research Te</li> </ul>	eam							<ul> <li>✓ I</li> </ul>
The following	table lists all per	rsonnel that are directly involved in this	protocol					
Add Research     collapse rows	her							
Role	Name	Lead Unit/Department	Business Title	Contact details	Edit Permission	Responsibilities	CITI Training	Action
E PD/PI	Jane Smith	Division of Student Affairs	Professor	۲	YES	Other	Not required	Ø
Co-PD/PI	PI Paula	COM: Research Vascular Biology	Professor	۲	YES	Consent Subjects	Not required	6
E Co-PD/PI	Student Sam	COS: Psychology	Student	۲	YES	Recruit Subjects	Not required	

- 2. Delete the new PI from the Research Team using the red trash bin icon at the end of their row
  - Only a third party can change two Pl's on the research team, in this example Student Sam can make these changes
- 3. Use the pencil icon to click into the existing PI's row

4. In the Researcher field, click the name of the existing PI and start typing the name of the new PI then select their name from the drop down

Add Researcher		×
Researcher*	Smith, Jane X 🔺	
Project Role*	PI Paula Q	
Department*	Paula, Pl Division or student Arrans	
	Division of Student Affairs	
Give permission to make edits to this project	Yes	
Responsibilities (select all that apply)*	× Other ×	
Please Describe*	Study oversight	
Highest Earned Degree		
Field of Study		
	x Ca	incel 🕂 Save

5. Edit the responsibilities for the new PI and click to save

Add Researcher		×
Researcher*	Paula, Pi	× •
Project Role*	PD/P	
Department*	COM: Research Vascular Biology	× •
	Division of Academic Affairs > College of Medicine > COM: Biomedical Science > COM: Research Vascular Biology	
Give permission to make edits to this project	Yes	
Responsibilities (select all that apply)*	Consent Subjects	×
Highest Earned Degree		
Field of Study		
		* Cancel 😌 Save

6. Click the Add Researcher button to add the existing PI as a new Research Team member

Add Researcher		×
Researcher*	Smith, Jane X 🗸	-
Cannot find a researcher. Do you want to add a student or an external user?		
Project Role*	Select one	
Give permission to make edits to this project	٩	]
Responsibilities (select all that apply)*	Co-PD/PI	L
Highest Earned Degree	Co-Investigator Faculty	
Field of Study	Post Doctoral	
Field of Study	Post Doctoral Associate	
	Post Doctoral Scholar	-
		_
	x	Cancel 🕒 Save

The new PI is now reflected on the project details up at the top and in the Research Team panel

view Type		Stage		Status			End Appro	oval Date
ot yet determine	d	Initial Protocol Application		Draft Su	ibmission Pending		N/A	
The followir	ng table lists all pe	ersonnel that are directly involved ir	n this protocol					
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Add Reseated and the second	archer							
Add Reseatorial Add Reseatorial Add Reseatorial Role	ercher   expand rows 🖶 Name	Lead Unit/Department	Business Title	Contact details	Edit Permission	Responsibilities	CITI Training	Action
Add Reseated     Add Reseated     Collapse rows     Role     PD/PL	expand rows Đ Name	Lead Unit/Department COM: Research Vascular Biology	Business Title Professor	Contact details	Edit Permission YES	Responsibilities Consent Subjects	CITI Training Not required	Action
Add Research     Add Research     Collapse rows     Role     PD/Pt	ercher expand rows  Name PI Paula	Lead Unit/Department COM: Research Vascular Biology	Business Title Professor	Contact details	Edit Permission YES	Responsibilities Consent Subjects	CITI Training Not required	Action
Add Reseated Collapse rows Role  ColPD/P1 Co-PD/P1	I expand rows C Name I PI Paula Student Sam	Lead Unit/Department           COM: Research Vascular Biology           COS: Psychology	Business Title Professor Student	Contact details	Edit Permission YES YES	Responsibilities       Consent Subjects       Recruit Subjects	CITI Training Not required Not required	Action