



How to Change the PI on an Application

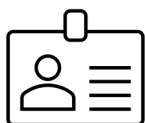
QUICK STEPS



- From the Manage Protocols window select the application that requires a PI change.
- *Only approved applications with no other post approval activities (i.e. amendments, renewals) can be amended.*
- Click on the **Title** and open the application.



- Click the **Amend button** on the right-hand side of the screen.
- Following the instructions, complete the **Amendment Coversheet**. Scroll down to amend the application itself.
- Click on the **Personnel** section to change the PI.



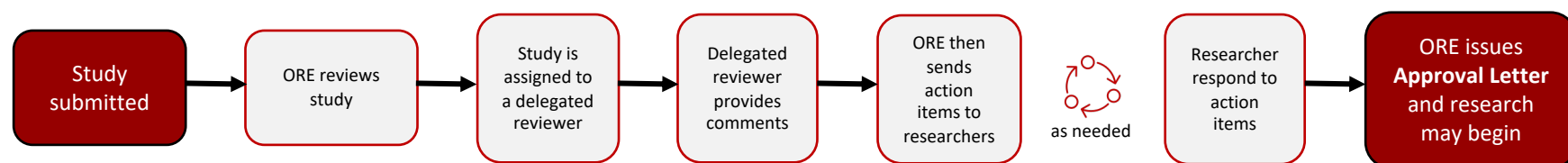
- Click the edit pencil image to change the current PI role. A dialogue box with the following fields show up **Person, Department, Researcher Role, Appointment Status, Permissions**.
- Change the **Researcher Role** to Co-PI (or another appropriate role) - scroll to the bottom and press the **Done** button.
- Click **Add Line** and the dialogue box with all fields appears – fill out the details of the new PI and ensure that you give **Full Access in the Permission field (Full access will ensure that the PI will have access to review and submit the application)**.
- *Please note that there can only be ONE PI for each application.*



- *Review the application and supporting documents to ensure the change in PI is reflected throughout. Ensure that this is also reflected in the funding, COIs, data access or research agreements.*
- As you changed yourself from a PI to Co-PI – notice the **Submit** button greys out and you can no longer submit the amendment.
- Select **Notify PI to Submit** button on right-hand side – the PI gets an email notification. PI who has **Full Access** will in turn be able to review and **Submit** the amendment.

APPROVAL PROCESS

For a typical minimal risk study...



Check out our other quick guides



New Application



Amendments



Change of PI



Annual Renewal



Close Request



Unanticipated Problem