SFU

Unsure? Contact us at dore@sfu.ca

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…

Study submitted → ORE reviews study → Study is assigned to a delegated reviewer → Delegated reviewer provides comments → ORE then sends action items to researchers → as needed → Researcher respond to action items → ORE issues **Approval Letter** and research may begin

Check out our other quick guides

New Application | Amendments | Change of PI | Annual Renewal | Close Request | Unanticipated Problem