Overview

The Principal Investigator (PI) is the person responsible for the protocol application. The PI's name and contact information must be entered before the application can be created and saved. Only one PI is allowed per application.

All questions must be answered and fields filled out in order to submit the application.

Principal Investigator page

1. Click Add.

Note: The Close Without Saving button is only available until the Principal Investigator (PI) is entered and the record saved.

New Principal Investigator page

2. Enter the individual's Uniqname, Last Name, or any part of either in the User Name field.

Tip: Use percent sign (%) as a wildcard character to specify parts of words. For example, searching for %kim% returns Hakim, Kim and Kimball.

3. Click Find.

New Principal Investigator page (continued)

4. If the individual is listed in the search results, click the correct User Name and go to step 6.

5. If the individual is not listed, Click next to User Not Found? for further instructions. New users can only be created by Protocol Creators.
6. Select the correct option in the **Use current UM employee contact information?** field.

**Note:** The contact information automatically populates from the person’s M-Pathways data. If you select **No** in step 6, the fields can be edited as needed.

7. Check the applicable boxes under **Protocol Roles** (Husbandry Care, Animal Handler and/or Animal Health Contact).

**Notes:**

- **Husbandry Care:** Any person on your protocol that performs and is responsible for direct animal care on a regular basis. Can only be assigned by the PI and must be approved by IACUC. Tasks include:
  - Identifying clinical and behavioral signs of illness in animals and reporting accordingly.
  - Transferring animals to clean cages.
  - Cleaning equipment located inside animal rooms.
  - Sweeping/mopping and sanitation of animal rooms.
  - Trash removal.
  - Changing paper liners in animal cages.
  - Prepping and organizing supplies in response to rodent health management procedures.
  - Stocking supplies in animal rooms and taking inventory of items needed.
  - Other administrative tasks related to animal care such as scheduling of student help for husbandry care, emergency coverage, weekend care, etc.
  - Documenting animal care activities.

- **An Animal Health Contact** and an **Animal Handler** must be specified on the application. However, it is not required for the PI to fulfill those roles.
8. (optional) Enter a contact phone number in the **Alt Phone** field.

9. (optional) Enter a contact email address in the **Alt Email** field.

10. Enter a detailed explanation in the **Describe experience and qualifications for handling animals** field.

   **Note:** If the PI was included in a previous application/protocol and an experience and qualifications description entered, that description defaults in this field. The description is editable; however any changes made are reflected on all existing applications and protocols.

11. Click **OK**.

### Notes:
- The PI’s contact information, roles and experience explanation can be edited by clicking **Update**.
- If the PI needs to be changed to a different individual, click **Delete** to delete the current PI, then repeat steps 1-13.

12. Click **Save**.

### Note:
Once the PI information is saved, the application is given a number. This is the number the application will have at every stage moving forward.

13. Click **Update Appointment**.
Edit Protocol Personnel page

14. If the appointment under which the PI is filing the application displays, select the appointment, then go to step 22.

15. If the appointment is in the future and not listed, select Yes in the Future Appointment field.

Edit Protocol Personnel page (continued)

16. Enter the PI's future appointment title in the Title field.

17. Click Select... in the Dept/Unit field.

Select Organization page

18. Type all or part of the appointment's department name in the Filter By field.

Note: You can search for the department by ID by selecting Department ID from the Filter By drop-down menu and entering the ID in the text field.

19. Click Go.

Select Organization page (continued)

20. Select the correct Department.

21. Click OK.
22. Click **OK**.

23. Click **Save**.