Changing the Principal Investigator

Any study team member who has been granted editing rights can change the Principal Investigator (PI) on a research study. However, the method for changing the PI depends on the State of the submission.

If the study application is in an editable state (Pre Submission), the PI can be changed directly by editing the application. If the study application is in a non-editable State (e.g., Approved), an Amendment must be created.

Change PI: Pre Submission

Study Workspace

1. From the In Progress tab of the Home Workspace, click the name of the study (not shown).
2. Click Edit Study from the Activities menu in the Study Workspace to open the study application.
3. Click Clear in section 1.2 Principal Investigator to delete the Principal Investigator.
4. Click Select... to choose the new Principal Investigator.
5. Select Last from the Filter by drop-down menu and type the last name (or partial last name) of the new Principal Investigator in the search field.

Note: You can also search by User ID (uniqname), First name, Organization, or Project ID.

6. Click Go.

7. Click the radio button next to the Principal Investigator's name.

Note: Individuals are added to the Select Person list once they log into eResearch for the first time. If the study team member you are attempting to add does not appear in this list, click Create A New User Account in section 1.2 of the study application.

8. Click OK.

9. Click Save.
Change PI after Submission

Since the study is in a non-editable state, you must first create an Amendment in order to change the PI. See the Creating an Amendment step-by-step procedure for instructions.

The following steps assume you that you have already created the amendment, and you are ready to amend the application.

Amendment Workspace

1. Click Edit Study from the Activities menu in the Amendment Workspace.

2. Click Delete next to the name of the PI in section 1.3 Study Team Members.

3. Click OK when asked if you are sure (not shown).

4. Click Clear in section 1.2 Principal Investigator, and then click Select...

5. Repeat steps 5-9 from the previous section.

Note: The PI must submit the amendment before the changes can be approved and applied to the study.