



Quick Tip: How to Change the PI on an Application

Overview

Changing the Principal Investigator on an application allows one researcher to transfer the PI role to another researcher. If the former PI is the one making the change to the PI role, the former PI adds themselves as a Project Team Member on the file after transferring the PI role.

How to Change the PI on the Application

This walkthrough has Test_pi1 transferring the Principal Investigator role to Test_pi2. (We are acting as Test_pi1 for this walkthrough.)

In this example, Test_pi2 was already a Project Team Member on the application, so we'll need to delete them as a Project Team Member so that they can become the new PI.

Since Test_pi1 was originally the PI on the application, they will then add themselves as a Project Team Member.

Click Edit next to the appropriate file. The file will open.

	File No	Project Title	Principal Investigator
	<input type="text"/> ▼	<input type="text"/> ▼	<input type="text"/> ▼
<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Clone"/> <input type="button" value="Delete"/>	Ref No : 7317	Example Application	Dr. Memorial Test_pi1 (Faculty of Science\Department of Biology)

Click on the Project Team Info tab. Here, we see that Test_pi1's information is currently in the Principal Investigator section.

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select profile. If you load an alternate researcher profile to the PI section, be sure to reload your researcher profile to the O section below.

Change PI Refresh

Prefix: Dr. Last Name*: Test_pi1 First Name*: Memorial

Affiliation*: Faculty of Science\Department of Biology

Scroll down to the Other Project Member Info section. Click Delete to remove the individual who will become PI from the Project Team Member list. Click OK to confirm.

NOTE: Individuals can only be a PI **OR** Project Team Member at any given time. Therefore, we must remove Test_pi2 from the Project Team Member role before making them the PI. You will receive an error message if you attempt to add someone to both roles at the same time.

Other Project Member Info:

Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

Add New		Last Name	First Name	Role In Project
Edit	Delete	Test	Bob	Grant Facilitator
Edit	Delete	RGCS Workflow Coordinator	Coordinator	RGCS - Workflow Coordinator
Edit	Delete	Test_pi2	Memorial	Co-Investigator

Now, we can make Test_pi2 the new Principal Investigator.

Click on the Change PI button in the Principal Investigator section. The Investigator List window opens.

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select a profile. If you load an alternate researcher profile to the PI section, be sure to reload your researcher profile to the PI section below.

Change PI Refresh

Prefix: **Dr.** Last Name*: Test_pi1 First Name*: Memorial

Affiliation*: Faculty of Science\Department of Biology

Search for the new PI's name. Here, we searched for Test_pi2's profile by searching for "test" in the Last Name field.

Investigator List

Close

Instructions : Search for and select the researcher profile you want to load to this application file. If the project team member does not have a researcher profile, contact your system administrator for guidance.

Start With Any part

Last Name: test
First Name:

Search Reset

Options	Last Name	First Name	Primary Affiliation
Select	ITS_Test	ITS	
Select	Test	Grenfell	School of Science and Environment
Select	Test	Bob	Faculty of Science
Select	Test_pi1	Memorial	Faculty of Science\Department of Biology
Select	Test_pi2	Memorial	School of Science and Environment\Biology
Select	Test_PP1		

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Close

Click Select next to the new PI's name. The new PI's information will now populate the Principal Investigator section. Here, we see Test_pi2's information is now in the Principal Investigator section.

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile of the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. If you load an alternate researcher profile to the PI section, be sure to reload your researcher profile to the Other Project Team Member section below.

Change PI Refresh

Prefix: Dr. Last Name*: Test_pi2 First Name*: Memorial

Affiliation*: School of Science and Environment\Biology

Finally, Test_pi1 must be added as a Project Team Member to the application.

NOTE: We must add ourselves as a Project Team Member in order to save the application. You will receive an error message if you attempt to save without taking this step, as currently Test_pi1 is neither the PI or a Project Team Member on the application.

To add Test_pi1 as a Project Team Member, follow the steps to add any Project Team Member to the file (Add New > Search Profiles). *How to add Project Team Members is outlined in the Creating a New Application manual.*

Other Project Member Info:

Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

Add New

		Last Name	First Name	Role In Project
Edit	Delete	Test	Bob	Grant Facilitator
Edit	Delete	RGCS Workflow Coordinator	Coordinator	RGCS - Workflow Coordinator
Edit	Delete	Test_pi1	Memorial	Co-Investigator

Once Test_pi1 has been added as a Project Team Member, make sure to save your work in the application.

After the PI role has been transferred, the new PI (Test_pi2) can locate this application under the Applications: Drafts section of their PI role block in the Researcher Portal. The old PI (Test_pi1) can locate this application under the Applications: Drafts section of their Project Team Member role block.