WHAT IS IT?

This job aid steps through how to complete a change request in InfoEd for a principal investigator or co-investigator change.

TIP SHEET

GETTING STARTED:
HOW TO REQUEST A PRINCIPAL INVESTIGATOR (PI) or (Co-I) CHANGE

1. Create a Change Request

   - Upon logging into the InfoEd portal, create a change request by clicking Change Requests and then clicking Personnel - PI or Co-I Change from the Create New menu.
   (Note: If you do not see the option to create a Change Request, you may need to submit a security form.)

Learn more:
osr.northwestern.edu/resources/infoed
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2. Complete the New Change Request Questionnaire
   • Step 1: Link the Change Request to a Sponsored Project by clicking Linked Proposal and selecting Add New
   • Step 2: After linking a proposal (i.e. the SP#) to your change request, the relevant questions will appear below
   • Step 3: Indicate or complete the following:
     - Chartstring
     - Additional (New PI or Co-I Information), OR
     - Replacement (Original PI or Co-I Information AND New PI or Co-I Information)
     - Effective date of change
     - Reason for change
     - Clinical Trial Requirements (if applicable)

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Chartstring:
If selecting No only one chartstring is affected, then you will be prompted to enter the (one) chartstring

- Is there more than one chartstring affected? [ ] Yes [ ] No
- Chartstring:

If selecting Yes more than one chartstring is affected, then a text box will appear in which you can enter all affected chartstrings

- Is there more than one chartstring affected? [ ] Yes [ ] No
- List all chartstrings where change should be made:

If the PI or Co-I Change Request needs to occur within an Industry Clinical Trial, please enter the chartstring

- Chartstring:

Addition or Replacement:
If the PI's absence will affect the scope of work and/or someone else will be taking responsibility for the project during the PI's absence, you will be prompted to provide additional information

- Is this just a personnel addition, or is another person being replaced?
- New PI / Co-I Information
- Is this person already on the project? [ ] Yes [ ] No

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### Addition:

Choose **Addition** if you are only adding a new person or if a person's role is changing such that the change does not affect the role of other key personnel on the project (e.g. a fellow on the project is becoming a Co-I).

*New department research administrator / administrative contact:

<table>
<thead>
<tr>
<th>Personnel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, Jamie</td>
</tr>
</tbody>
</table>

### Replacement:

Choose **Replacement** if there will be a personnel change that affects more than one individual on the project (e.g. an existing Co-I is leaving the project and a fellow is replacing that Co-I or a Co-I is taking over for the current PI).

*Person to be replaced:

<table>
<thead>
<tr>
<th>Personnel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, Jamie</td>
</tr>
</tbody>
</table>

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New PI/Co-I Information:
In the case of additions, the new person is new to / not currently on the project

In the case of replacements, there is a changing of roles (e.g. an existing Co-I is taking over as PI), and the "new" person (e.g. Co-I) is not technically new to the project but rather they are new to the role they are assuming

• Effective date of change:
Start date of the new person / new role

• Reason for change:
Provide a short description (e.g. Fellow now has a faculty appointment and will assume the role of Co-I)

Clinical Trial Requirements:
For industry clinical trials, additional requirements appear requesting the following information:

• Upload the most recent IRB approval letter
• Upload the most current consent form
• Upload the most current IRB protocol
• Upload the most recent IACUC approval letter (if applicable)
GETTING STARTED: HOW TO REQUEST A PRINCIPAL INVESTIGATOR (PI) or (Co-I) CHANGE

Other Information & Uploads:

Additional information for OSR (optional):

Additional Documents for OSR (optional): 

3. Save
   • Click Save at any time to save your work and return to it later

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