Personnel Change Request

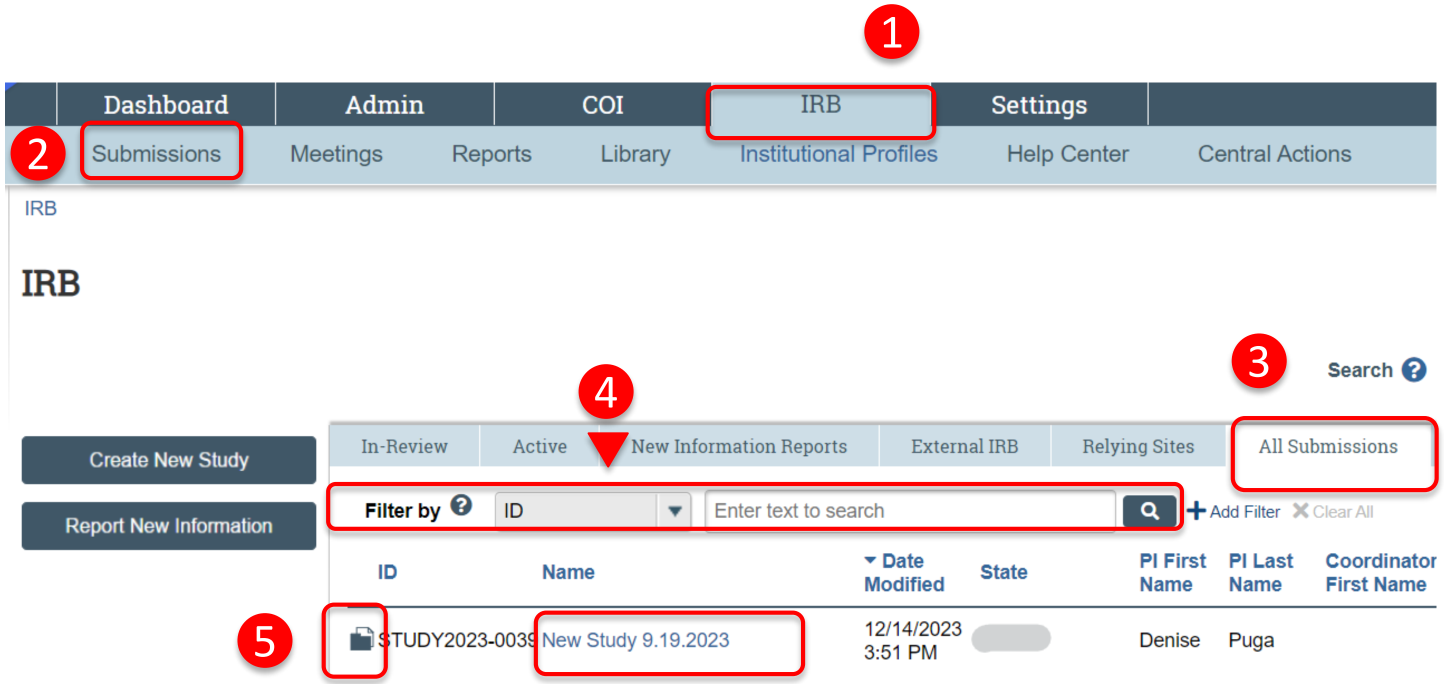
Human Research Protection Program
(Last Updated: 01/29/2024)

TEXAS A&M UNIVERSITY

This PowerPoint will guide you through updating your study personnel, including a change in PI.

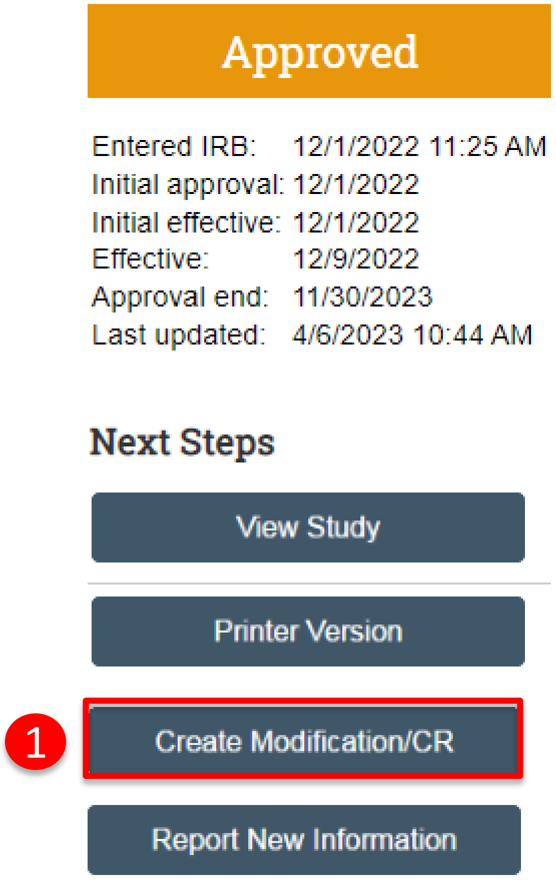
Getting started

1. Navigate to the **IRB workspace**
2. Select **Submissions** tab
3. Select **All Submissions** tab
4. Note: **Filter by** allows you to sort through your studies by name, PI first and last name, and submission type.
5. Open your study by selecting the **folder symbol** or the **name** of the study.



Creating a modification

1. Select **Create Modification/CR**



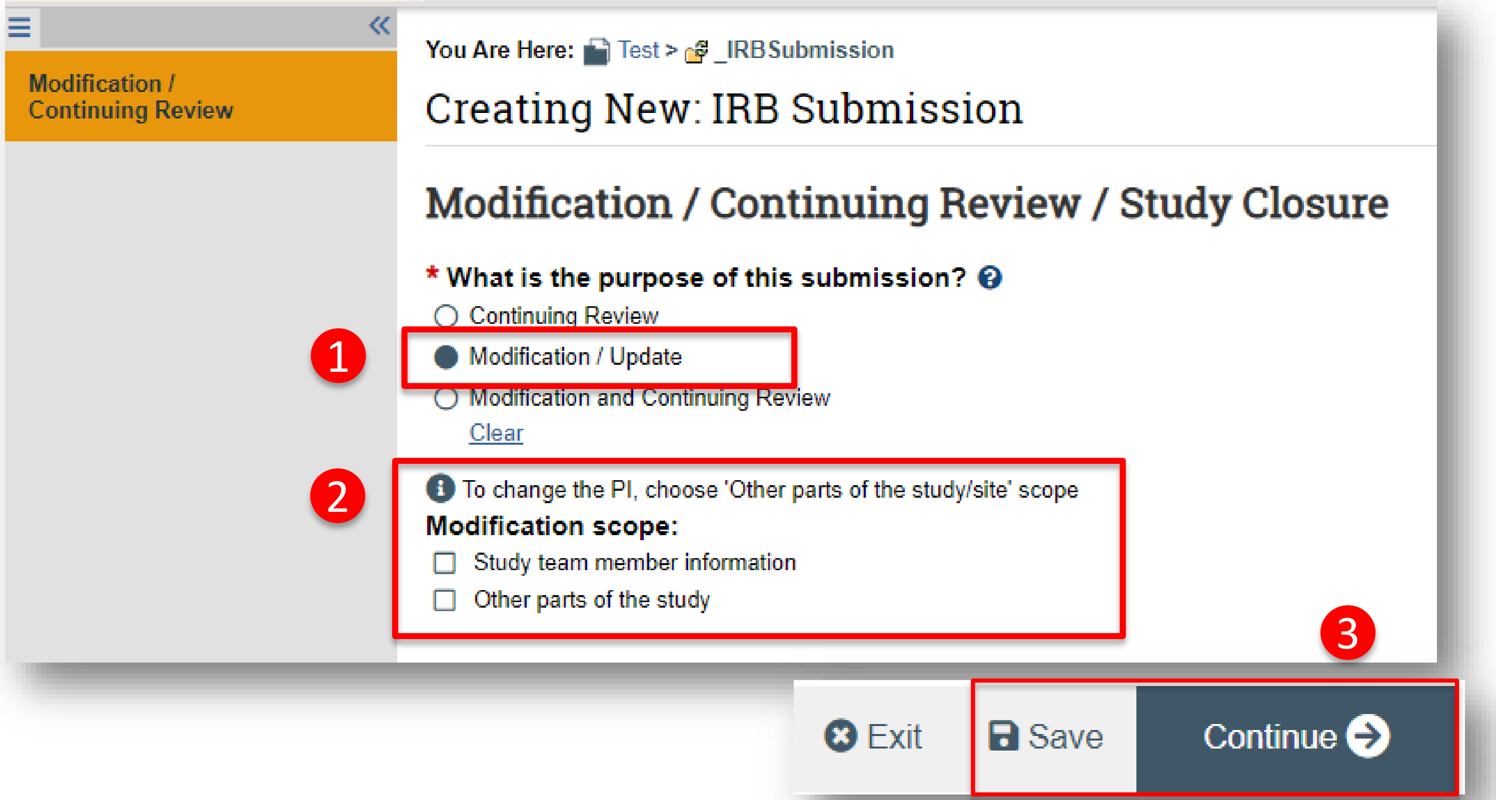
Updating Study Personnel

1. **Purpose –** Select **Modification/Update**

2. **Modification Scope** – If you are adding:
    - A new Principal Investigator (PI), select **Other Parts of the Study**
    - New study members (not including PI), select **Study Team Member Information**

    Important notice: Once you select *Save or Continue,* you will not be able to edit your response on this page. If an incorrect response was chosen, you will need to discard the submission and start again. Instructions on how to discard a submission can be found on the next slide.

3. Click **Save** and then **Continue**

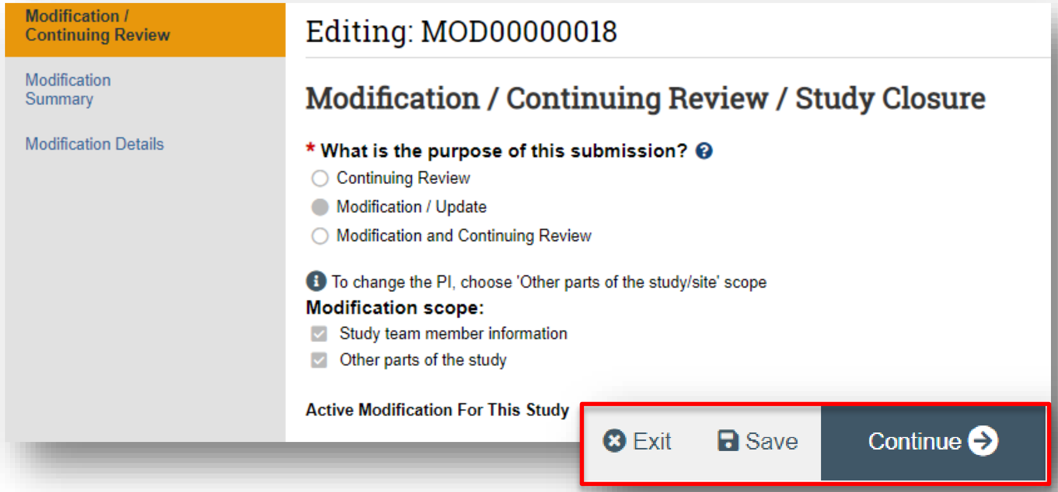


How to discard a modification

1. Once you select **Save** or **Continue** on the **Modification/Continuing Review** page, you will not be able to edit your purpose or scope on this page.

2. If an incorrect response was chosen for either "*What is the purpose of this submission?*" or "*Modification scope*" and the form has been saved, then click **Exit** to leave the submission and select **Discard** from the study record workspace. A new Modification/CR request will need to be created to continue with the modification request.

1



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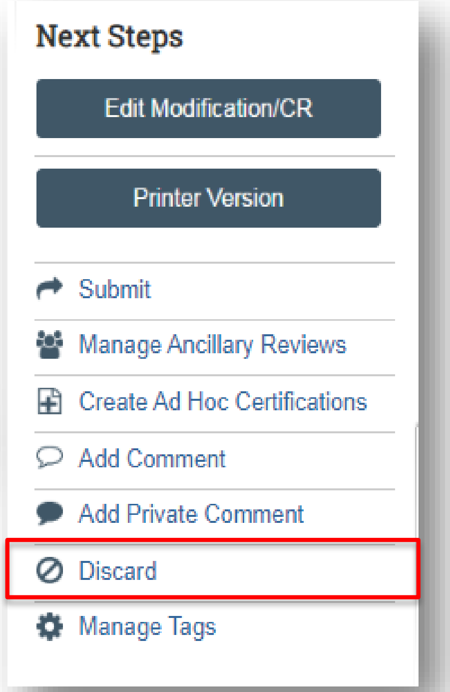
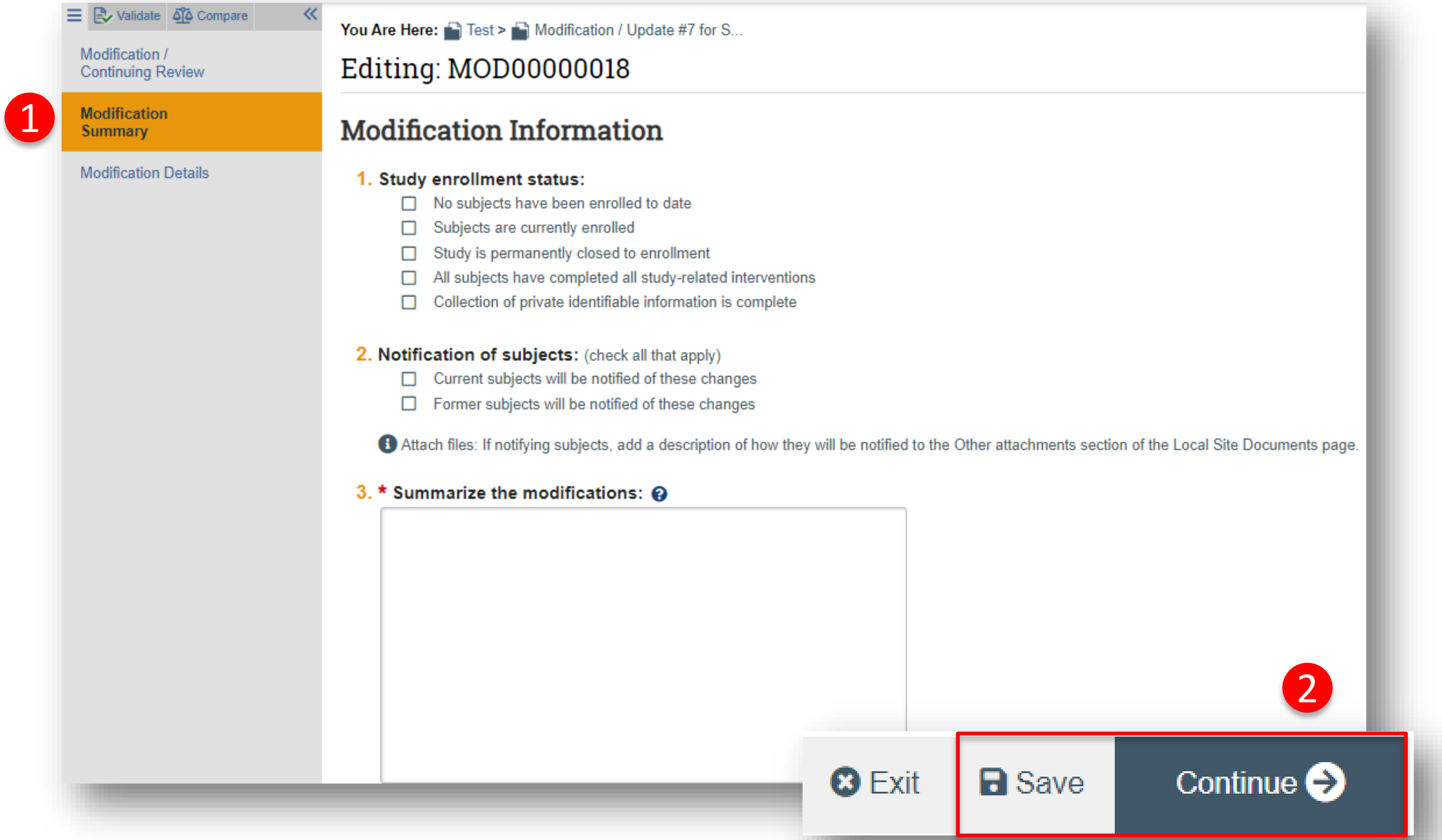


Complete the Modification Summary

1. Complete the **Modification Summary** page
2. Select **Save** and then **Continue**



Adding/removing TAMU personnel (not including PI)

To add **TAMU study team members**:

1. Click **+Add**

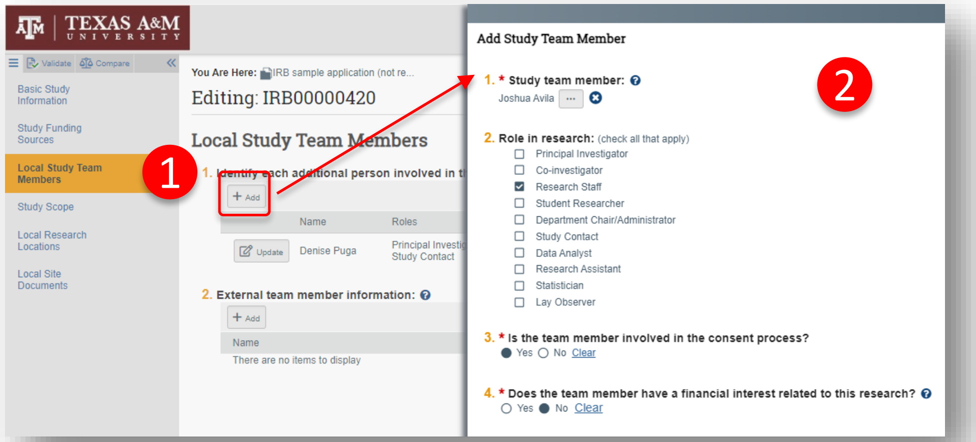
   I am trying to add study personnel to an IRB protocol, why am I not able to locate them in the system?
   Some TAMU members (such as undergraduates, visiting scholars, and adjunct/affiliate professors) need to opt into their information being fed into Huron before they are active in the system. If you are not able to locate a member of your research team, have that individual visit the following website: https://raes.dor.tamu.edu. *Note*: It will take 24 hours before their information is active in Huron.

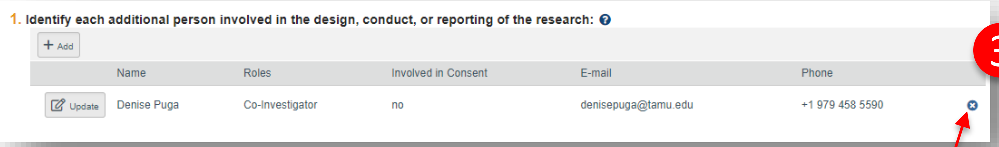
2. Complete the **Add Study Team Member** smart Form
   - Q1 – Type the name of the team member being added or click the ellipsis […]
   - Q2 – Identify the role of the team member
   - Q3 – Identify if the team member will be involved in collecting consent.
   - Q4 – Identify if the team member has a conflict of interest.

Important! All personnel being added must have completed CITI training and log into the new Texas A&M SSO CITI URL

To remove study team members:

3. Click the X to the right of the team member.





Click **X** to Remove

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Changing Principal Investigator

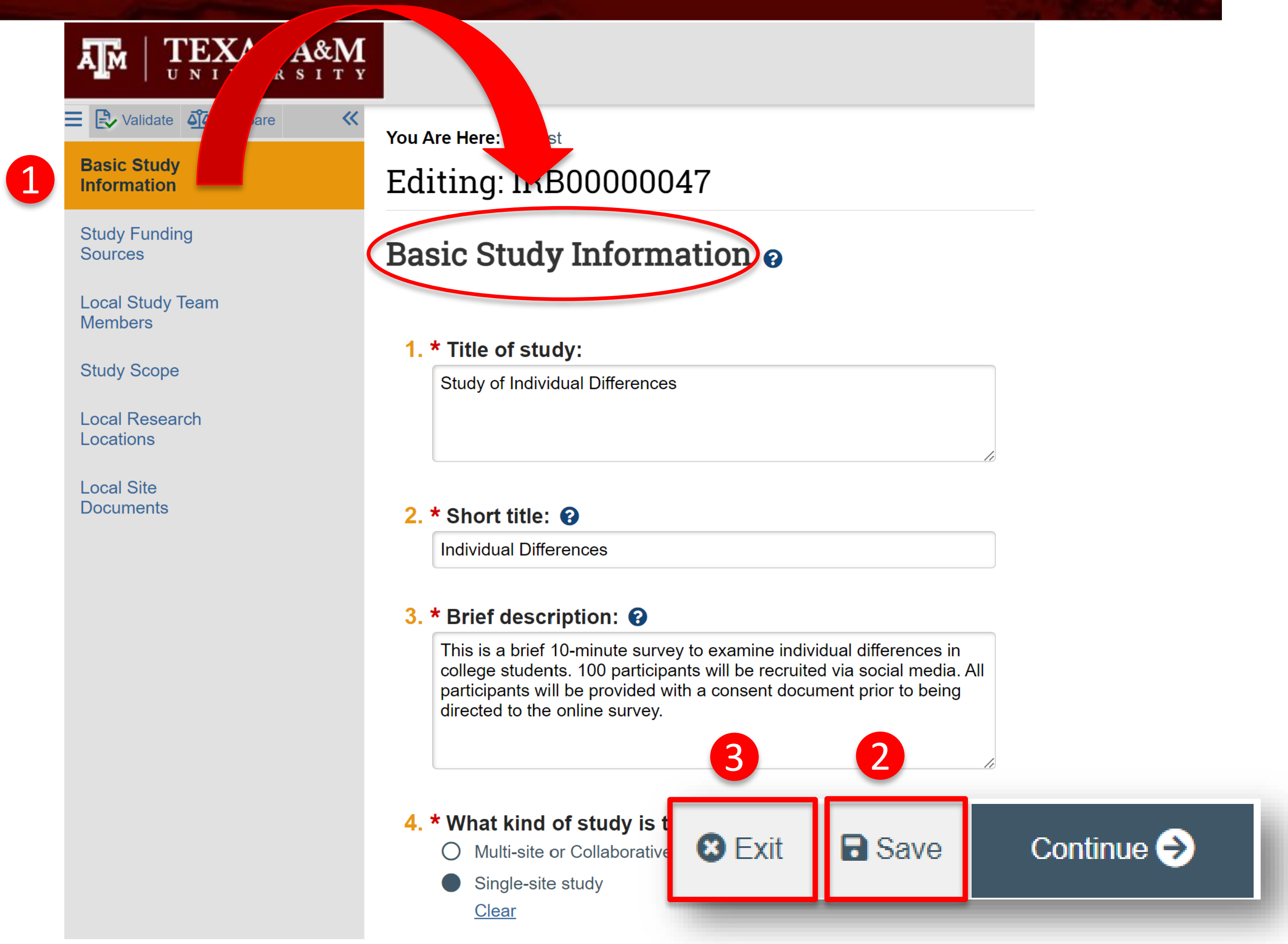
If you selected **Other Parts of the Study** to change PI, you will have access to the full IRB application. This is done to allow you the opportunity to update all pages likely to be affected by the change of PI, such as :

- **Basic Study Information page:** Update the Local Principal Investigator
- **IRB protocol** (found in the Basic Information page): You will need to update the IRB protocol to include the name of the new PI
- **Study funding source page:** Changes in the protocol PI may necessitate an update to the funding information, such as adding or removing funding sources.
- **Local Research Location page:** The research location (e.g., building, campus) may need to be updated with the change in PI.
- **Local Site Documents page:** The consent document will need to be updated to include the name and contact information of the new PI.

Navigate the IRB Application to make edits

Once **Continue** is selected on the **Modification Summary** page, you will be brought to the application to make edits.

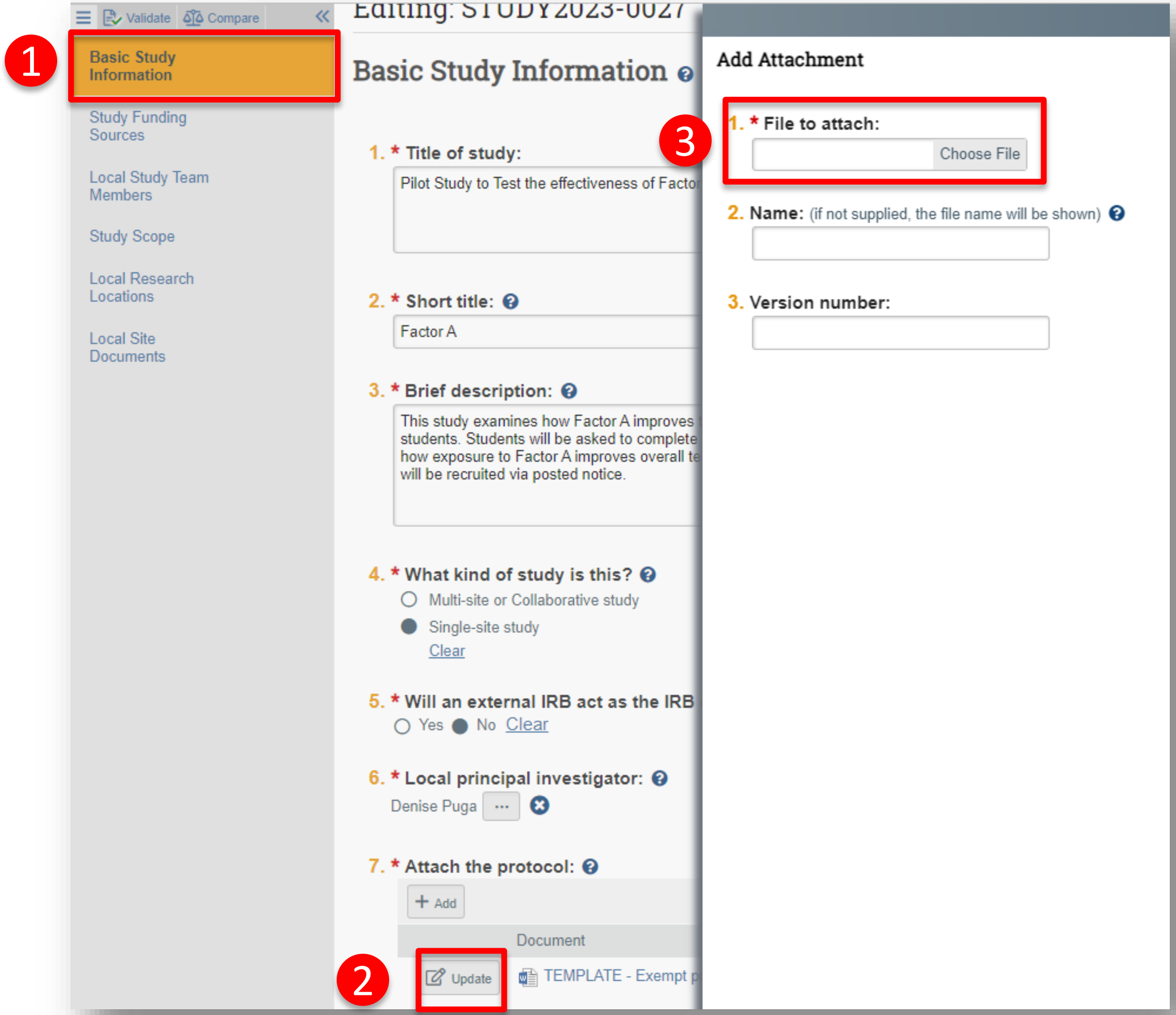
1. Use the navigator on the left side of the screen to locate any pages that need to be edited. The page currently being viewed will be shown highlighted in orange. To view a specific page, select the desired page on the navigator.
2. Click **Save** after making any edits to ensure your work is saved.
3. Once all edits have been made and saved, click **Exit.**



How to attach your revised protocol

Modifications to approved procedures (e.g., participant enrollment, consent process, recruitment) require that you update your protocol document. Attach an updated protocol to the Basic Study Information page:

1. Navigate to the **Basic Study Information** page
2. Select **Update** on ***Attach Protocol*** (this can be either Question 7 or 8)
3. Click **Choose File** and attach your revised protocol and then click **OK**



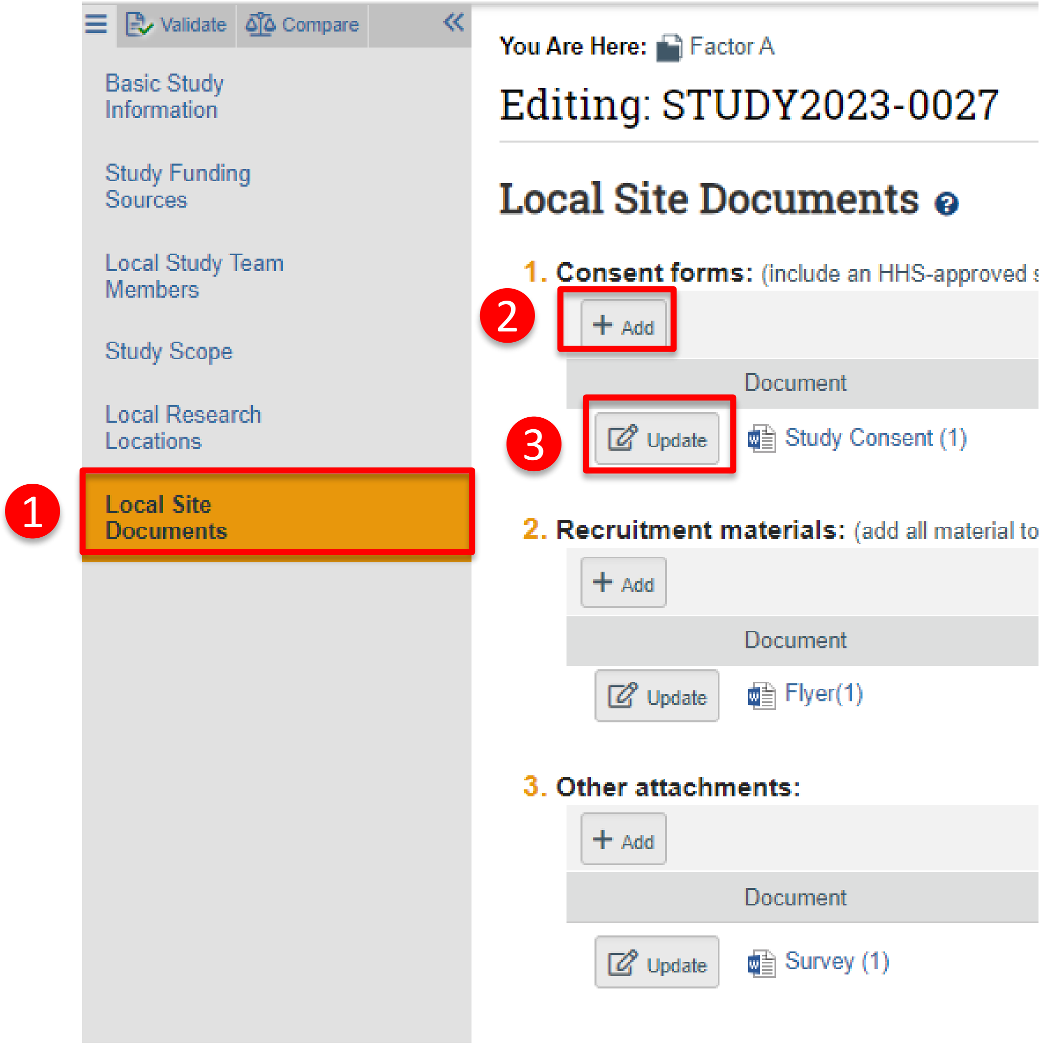
How to attach new or revised study documents

If you need to add a new or revised study document:

1. Navigate to the **Local Site Document** page

2. Select **+Add** to attach a ***new*** study document or **Update** to attach a ***revised*** study document. It is important that you select the correct option to ensure good document management.

3. Click **Save,** then **Exit** to navigate back to the study Workspace.



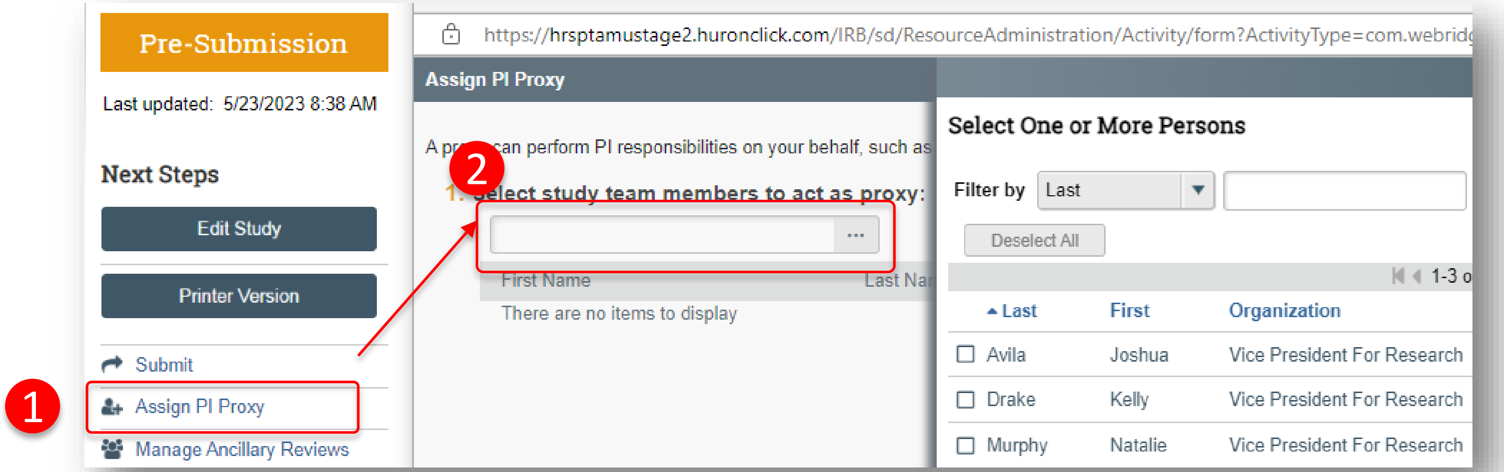
How to assign a PI Proxy

PI proxy(ies) may act on behalf of the Principal Investigator of the study. PI proxy(ies) may submit a study for initial review, modify the study, or submit for continuing review. The PI may assign more than one proxy, but all proxies must be listed as team members within the study.

From the IRB Workspace

1. Click **Assign PI Proxy**
2. Select study team member to act as proxy

   IMPORTANT! Only individuals listed as study personnel in the IRB application, under **Local Study Team Members,** may be assigned as PI proxy.



Submitting your personnel change request to the IRB

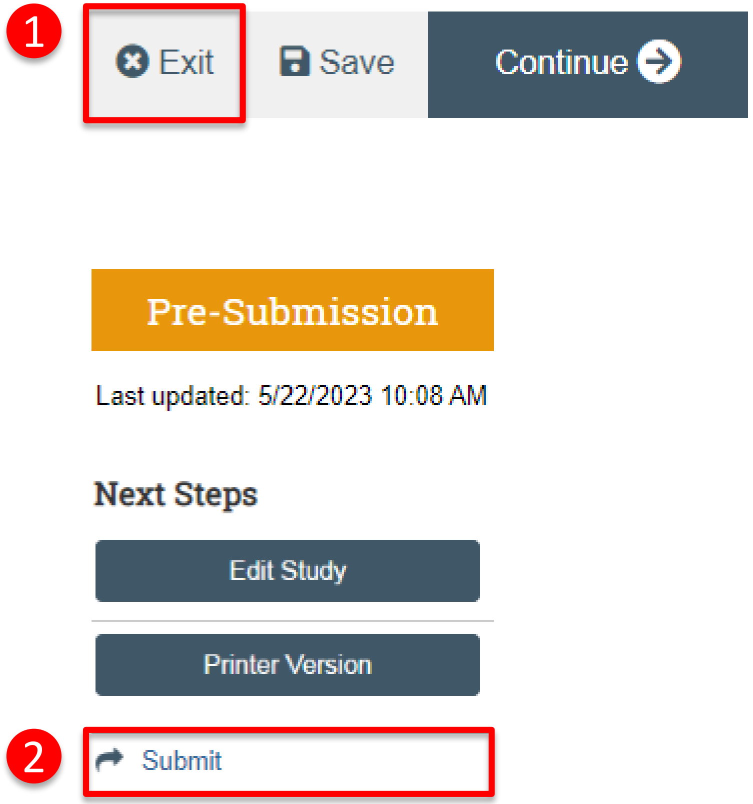
Once you have finished editing the IRB application and saved all your edits:

1. Select **Exit** to be directed to the IRB Workspace

2. Click **Submit**

   IMPORTANT! The PI or PI Proxy must click ***Submit*** for the submission to be received by the IRB. Note: If you are not a PI or PI Proxy you will not see this option.

3. Click **OK**



Visit the FAQ webpage

Please take a moment to visit the frequently asked questions webpage **Huron FAQ – Division of Research (tamu.edu)** to learn more about Huron functionality.

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