HOW TO REQUEST
A PRINCIPAL INVESTIGATOR (PI) OR CO-PI CHANGE

This job aid walks through how to complete a change request in InfoEd for a principal investigator or co-investigator change. To begin a new request, navigate to the Change Request module in InfoEd and select “Personnel - PI or Co-I Change.”

Different information is required depending on if personnel is being added or replaced. Clinical Trials also have an additional section to complete.

Note: A security form may be needed if the Change Requests option is not available in the InfoEd Home menu.

Tip: Click Save at any time to save your work and return to it later.

Link the Change Request to a sponsored project by clicking Add New in the linked proposal menu.

The relevant questions will appear below after a proposal is linked to the change request.

Select if one or more chartstrings will be affected. The appropriate fields will appear depending if one or multiple chartstrings needs to change.

Enter the chartstring even if the PI or Co-I change request needs to occur within an Insutry Clinical Trial.

Identify if the personnel change will be an addition or replacement.

Choose Addition if the a new personnel is being added or if a role is changing (e.g. fellow becoming Co-I) but does not affect other key personnel on the project.

Choose Replacement if there will be a personnel change that affects more than one individuals on the project.
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FOR REPLACEMENTS ONLY

Click on the icon under Person to be replaced to open the directory to select the PI or Co-I.

Use the personnel directory to search for the PI or Co-I by last name.

Click the Select button to add the personnel to the change request.

Identify if the PI or Co-I will remain on the project.

If Yes, enter their new role and effort. Click the Add New button to create a new line.

FOR ADDITIONS AND REPLACEMENTS

Identify if the new PI or Co-I is currently on the project.

Click on the icon under New Person to open the personnel directory. As shown above, use the directory to select the new PI or Co-I.

For Additions Only: Enter the new role of the personnel.

Enter the effort for the new personnel. Click the Add New button to create a new line.

Provide the date the change will go into effect and a brief explanation for the change.
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CLINICAL TRIAL SPECIFIC

Clinical Trial Requirements
- Upload the most recent IRB approval letter
- Upload the most current consent form
- Upload the most current IRB protocol
- If applicable, upload the most recent IACUC approval letter

FOR ADDITIONS AND REPLACEMENTS

Other information and Uploads
- Will this change include a change of department on the project chartstring(s)?
  - Yes  - No
- New department/center:

Departments
- Select department from list:

  0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Or -
  Pick from tree view. Only departments configured as Organizations/Institutions are available for selection.

Northwestern University
- Feinberg School of Medicine
- Northwestern School of Law
- Research Centers & Institutes
  - Feinberg
  - Northwestern
  - Simpson Querrey Institute
  - School of Continuing Studies

If sponsor approval is required, please upload correspondence to be endorsed by OSR:

Additional Info for OSR (optional):

Additional documents for OSR (optional):

Upload the additional required information for industry clinical trials.

Identify if a department change will take place on the project chartstring.

If Yes, click on the icon below New department/center to access the directory.

Use the directory to search for the new department alphabetically.

Elect the radio button next to the department and click the Select button at the top right corner to add it to the change request.

Upload any additional sponsor required information for OSR.

Learn more: osr.northwestern.edu/jobaids