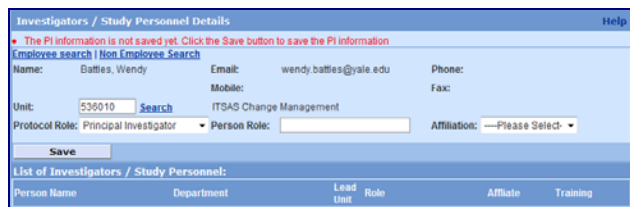


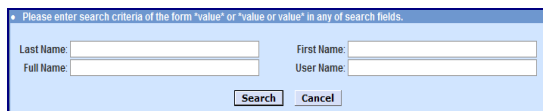
1. Click on the **Investigators/Study Personnel** link.



The **Investigators/Study Personnel Details** screen displays:



2. The name of the person entering the protocol defaults as the PI. Click **Save** to save this information.
3. However, if you need to enter a different name as the PI, click **Employee Search** or **Non Employee Search**. The Employee or Non Employee search screen displays.



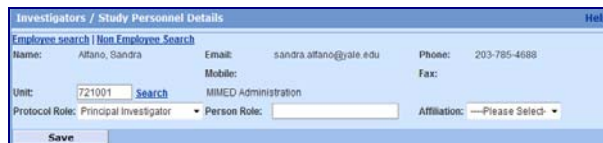
4. In the **Last Name** field, enter the name of the investigator with \* on both sides of the word (this is known as a wild card).



5. Click **Search**. The search results display:

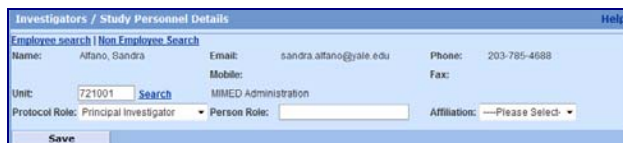
FULL_NAME	PRIOR_NAME	USER_NAME	HOME_UNIT	SCHOOL	EMAIL_ADDRESS
Alfano, Cheryl		ca7	835000		cheryl.alfano@yale.edu
Alfano, Francis Domenic		fda2	721258		
Alfano, Frank R		fra2	685112		
Alfano, Jessica		ja393	690208		
Alfano, Joseph F		ifa22	770001		
Alfano, Linda Lee		lla2	840200		
Alfano, Sandra		sa8	721001		sandra.alfano@yale.edu

6. Click on the person you'd like to select as the PI, in this case, Alfano, Sandra. The information appears on the screen.

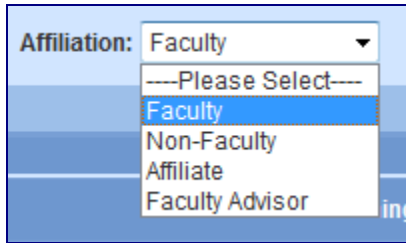


Note: the unit serves as an indicator for which Department Chair will receive the initial protocol submission via routing for "signature", meaning approval. In addition, you will need to change the unit if the PI has a dual appointment and a chair other than the "default one" needs to sign.

7. Choose the appropriate **Protocol Role** from the dropdown list. In this case, Principal Investigator, is the default setting.



- Click on the **Affiliation** drop down menu and select the appropriate entry. Click **Save**.



- The saved information displays for the PI:

List of Investigators / Study Personnel:					
Person Name	Department	Lead Unit	Role	Affiliate	Training
Alfano, Sandra	MMED Administration	<input checked="" type="checkbox"/>	Principal Investigator	Faculty	<input checked="" type="checkbox"/> Remove

Please note: If the person you are entering has not completed the required training, a red X will appear. This means the person cannot be added to the protocol until their training has been completed. When the training is complete, you will need to submit a personnel amendment. You'll find this information in the Coeus e-IRB training manual

- Choose additional study personnel by using the Employee or Non Employee links.