

Step-By-Step Instructions for Creating a Personnel Amendment

1. Open the protocol record.
2. Use the dropdown menu on the right-hand side to choose Personnel Amendment*.
3. Click Add.
4. When the page refreshes and you are in the Personnel Amendment submission, click on IRB PERSONNEL FORM. The personnel smart form will open in a new window.
5. Ensure the checkbox in the top right labeled Complete is unchecked.

***NOTE – Only one Personnel Amendment can be in process at a time. If Personnel Amendment is not available in the dropdown of submission types, it likely means that there is a previously-created Personnel Amendment submission that has not been reviewed by the IRB. If there is a Personnel Amendment submission in a status of Application Initiated, open that submission, make your revisions to the existing smart form in that submission, and review the personnel list for completeness.**

Adding Personnel

1. In the section labeled Personnel, click the Add button.
2. In the popup, begin typing the last name of the person being added in the search box and select the appropriate investigator.
3. Once the correct name is displayed in the text field, click Select
4. Repeat steps 1-4 if adding multiple individuals.
5. On the smart form, navigate to the name(s) that was just added (note, the form lists the study PI first and all other personnel in alphabetical order according to last name).
6. Choose a Role from the dropdown, enter Degree(s) as necessary, check the appropriate boxes in the list of responsibilities.
7. Verify that training is current or use the Training certificates upload icon to add any training certificates that are not displaying in the individual's training list.
8. Scroll up to the top of the form, click Complete, and then close the form.
9. In the protocol window, click the Submit button.

NOTE: Personnel Amendments cannot be submitted if the Complete checkbox has not been checked.

Removing Personnel

1. In the section labeled Personnel, locate the entry for the individual(s) being removed.
2. Enter the date(s) the individual(s) stopped working on the protocol in the End Date field.
3. Scroll up to the top of the form, click Complete, and then close the form.
4. In the protocol window, click the Submit button. NOTE, Personnel Amendments cannot be submitted if the Complete checkbox has not been checked.