

How To...

Change Personnel on Human Study

This guidance will outline how to change personnel (add or remove) on an *approved* Human Study application. After an application is approved, personnel changes must be done through the Change Personnel function listed under “My Activities” and *not* via an amendment, with one exception: changing the Principle Investigator.

*Changing the Principal Investigator **cannot** be done via the process outlined below. To change the Principal Investigator on an application, you must create and submit an amendment.*

Procedure:

1. Open the study application that requires a change of personnel.
2. Under “My Activities”, click “Change Personnel”.

The screenshot shows the ARISE (Alberta Research Information Services) web application interface. The top navigation bar includes the University of Alberta logo and the text 'ARISE Alberta Research Information Services'. The user is logged in as 'Hello, Hal Hartman'. The main content area displays details for a study application (Study: test (Pro00086548)). The 'My Activities' sidebar on the left contains several options, with 'Change Personnel' circled in red and a red arrow pointing to it from the text above. The main content area shows a table of activity history with columns for Activity, Author, and Activity Date.

Activity	Author	Activity Date
Copied Study	Lo, Patricia	2/28/2019 9:46 AM
New Copy Pro00086559: Test for Hall Hartman		
Copied Study	Lo, Patricia	2/27/2019 8:44 AM
New Copy Pro00086558: Test Student Study		
Change Personnel	Kordov, Kimberley	2/27/2019 8:43 AM
Change Personnel	Supervisor, Hal	2/27/2019 8:41 AM
PAA Completed	Supervisor, Hal	2/27/2019 8:41 AM
Withdrawn		
PAA Opened	Supervisor, Hal	2/21/2019 9:30 AM

- You can now **add** new personnel as either a Study Coordinator/Research Assistant or a Co-Investigator (1.0 and 2.0 below, depending on the role the personnel will be performing in your study). People listed in these fields **will** have “view” **and** “edit” access to the application in the online system. Start typing the name of your personnel and the system will search and display a list of names for you to choose.

Change Personnel

Change Personnel

1.0 Study Coordinators or Research Assistants: People listed here can edit this application and will receive all email notifications for the study. *If your searched name does not come up when you type it in the box, the user does not have the Study Coordinator role in REMO. Click the following link for instructions on how to [Request an Additional Role](#).*

Name	Employer
Patricia Lo	Student
Kimberley Kordov	VPR Research Ethics Office

2.0 Co-Investigators: People listed here can edit this application and will receive email notifications (*Co-investigators who do not wish to receive email, should be added to the study email list team below instead of here*). *If your searched name does not come up when you type it in the box, the user does not have the Principal Investigator role in REMO. Click the following link for instructions on how to [Request an Additional Role](#).*

Name	Employer
There are no items to display	

3.0 Study Team (*Co-investigators, supervising team, other study team members*): People listed here cannot edit this application and do not receive HERO notifications:

Last Name	First Name	Organization	Role/Area of Responsibility	Phone	Email
There are no items to display					

- You can also add someone to the Study Team, which is a “free text” field. *However*, people listed here will **not** have “view” **or** “edit” access to the application.

5. If you type the name of your personnel into the “Study Coordinators” box or the “Co-Investigators” box, and the system displays “No such user”, then there are one of two reasons, or both, as to why your personnel does not show on the list:
 - a. Your personnel does not have a profile because they have not logged into the system, which will create their user profile.
 - b. Your personnel does not have the role you are trying to add them into (ie. Human Research Co-Investigator role or the Study Coordinator role).

If you receive the “No such user” message, do **not** click “Create new contact” because that function will not allow you to add them. Instead, your personnel must log in to the online system and request an additional role.

- Please refer to the [video tutorials](#) for instructions on how to update your profile or on Requesting an Additional Role.

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Last	First	Organization	Role
No such user.			Co-Investigator
Patricia Lo			Student
Kimberley Kordov		VPR Research Ethics Office	

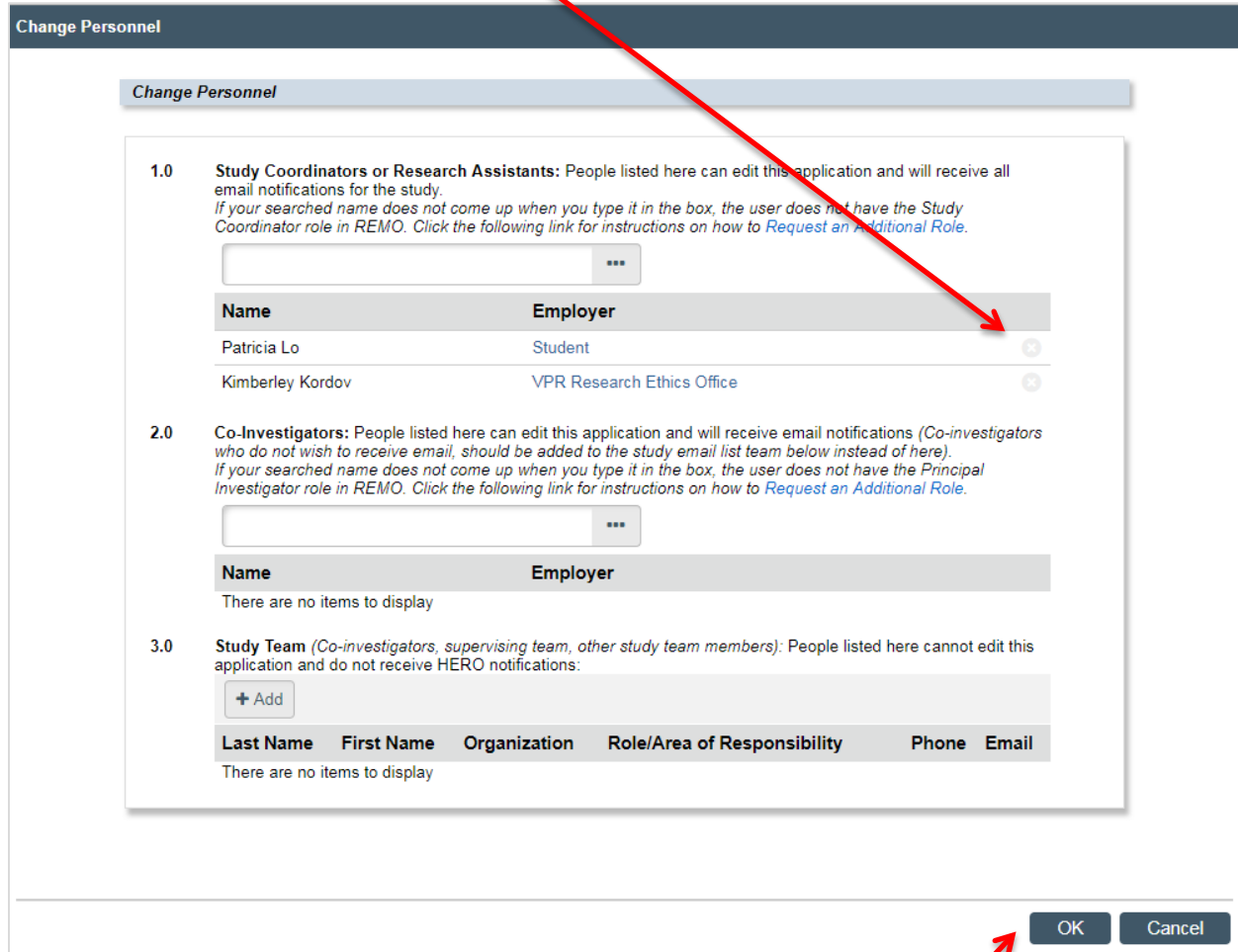
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Name	Employer
There are no items to display	

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There are no items to display					

- To **remove** personnel who are no longer working on your study, click the “X” to the right of that person’s name.



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...

Name	Employer	
Patricia Lo	Student	X
Kimberley Kordov	VPR Research Ethics Office	X

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If your searched name does not come up when you type it in the box, the user does not have the Principal Investigator role in REMO. Click the following link for instructions on how to [Request an Additional Role](#).

...

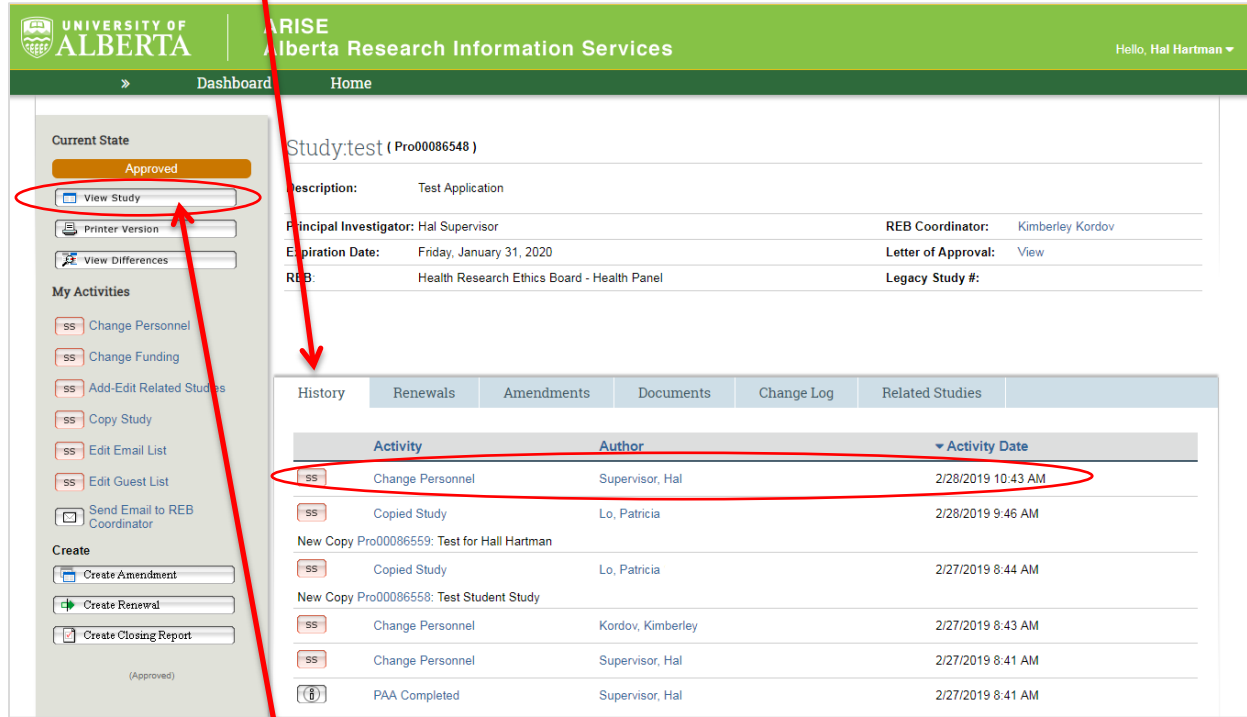
Name	Employer
There are no items to display	

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- To submit the Change Personnel request after you have completed adding/deleting personnel, click “OK”.

- The application history should reflect that the Change Personnel activity has been completed.



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Dashboard Home

Current State
 Approved
 View Study
 Printer Version
 View Differences

My Activities
 Change Personnel
 Change Funding
 Add-Edit Related Studies
 Copy Study
 Edit Email List
 Edit Guest List
 Send Email to REB Coordinator
Create
 Create Amendment
 Create Renewal
 Create Closing Report

Study: test (Pro00086548)
 Description: Test Application
 Principal Investigator: Hal Supervisor
 REB Coordinator: Kimberley Kordov
 Expiration Date: Friday, January 31, 2020
 Letter of Approval: View
 REB: Health Research Ethics Board - Health Panel
 Legacy Study #:

History Renewals Amendments Documents Change Log Related Studies

Activity	Author	Activity Date
Change Personnel	Supervisor, Hal	2/28/2019 10:43 AM
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Change Personnel	Supervisor, Hal	2/27/2019 8:41 AM
PAA Completed	Supervisor, Hal	2/27/2019 8:41 AM

- You can also check section 1.1 in “View Study” to make sure that the study personnel changes are reflected there.

If you have any difficulties with the processes outlined above, please contact the Research Ethics Office by email (reoffice@ualberta.ca) or call 780-492-0459.