

# **IRB Staff - Restricted PI Information**

This document is intended to provide an overview of restricted PI management. For policies associated with the use of this function (such as, when it is appropriate to indicate that a PI is restricted or remove restriction), please reference your IRB policy and procedure documentation.

# **Change PI Restricted Status**

A person's restricted status may be updated on the person profile.

#### 1. Navigate to the person's profile

Via the Unassigned Tab	OR	Via a Main Study Workspace
<ol> <li>Click "Submissions"</li> <li>Click "Unassigned"</li> <li>Click any Department Name to go to the space to search by person name</li> <li>From the Find menu, select "Contacts"</li> <li>Type in the first and last name, on the left</li> <li>Click "Find Now"</li> <li>Click the person name in the results provided to view details</li> </ol>		<ol> <li>Navigate to the main study workspace for the preferred PI</li> <li>Click the History Tab</li> <li>Click the name of any person that appears in blue</li> </ol>
My Projects       Fast Find               Rebecca Simms (pi) [Gas          Find:       Contacts            Organization:           Simms            Contact Last:           Simms            Contact First:            Rebecca           Find Now           Contacts 1 - 1 of 1           First:           Rebecca           Contacts 1 - 1 of 1         First:           Rebecca           First:           Rebecca           Builk Delivery		History     Project Contacts     Documents     IRB Assignment Details     Reviews       Filter by     Activity     Go     Clear     Advanced       Activity     Author     Submitted and provided assurance     Simms (pi), Rebecca       Submitted Study     Simms (pi), Rebecca

#### 2. Make edits to the Research Profile

- A. Within the profile space, click the "select view" dropdown
- B. Select "Research Profile"
- C. Once selected, the Research Profile screen will appear
- **D.** Click "yes" or "no" for question 1, as appropriate



### 3. Apply the changes

Click "Apply" on the right side of the Research Profile, after

making changes and before navigating away.



# **View PI Restricted Status during Review**

Only Principal Investigator "is restricted" status **will appear** during review. Indication of restricted PI **will not stop regular system functions**. The IRB staff member or reviewer must identify if review may proceed. Other study team member status (including Faculty Sponsor) will not readily appear during review.

Within the Submit Pre-Review Activity	OR Within the Edit Pre-Review Activity
Submit gre-Review	Edit Pre-Paview
The principal investigator is currently restricted	The principal investigator is currently restricted.
1. negulatory oversight: (check deanat apply)	Regulatory oversight: (check all Horapply)
<ul> <li>DOD (Department of Defense)</li> </ul>	DOD (Deparement of Derense)
DOE (Department of Energy)	DOE (Department of Energy)
<ul> <li>DOJ (Department of Justice)</li> </ul>	DOJ (Department of Justice)
ED (Department of Education)	ED (Department of Education)

Click on the 🕑 within Pre-Review to read more about this status during review.

# **View All Restricted PI Names**

A report of all individuals indicated as "restricted" is available to IRB staff only.

- 1. Click "Reports"
- 2. Click the "Custom Reports" tab
- 3. Under the "IRB Operations Custom Reports" heading, click "Restricted PI List"
- 4. View the Report

Standard Reports	Restricted F	PI List	
IRB Operations Custom Reports	First Name	Last Name	E
🖻 Name	Rebecca	Simms (pi)	te
Restricted PI List	Daniel	Duvette (ss-on)	te
-	2 items		