


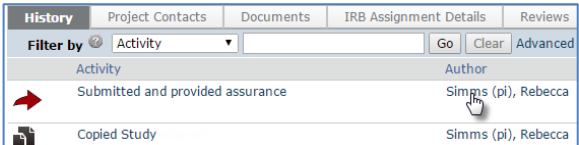
IRB Staff – Restricted PI Information

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

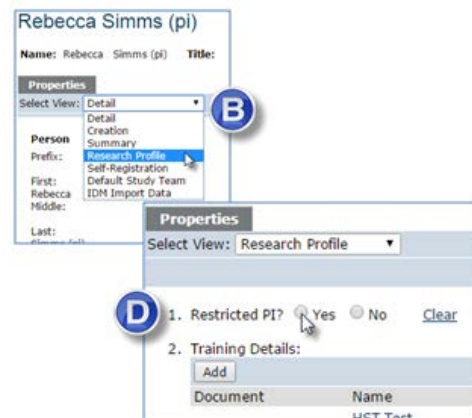
A person’s restricted status may be updated on the person profile.

1. Navigate to the person’s profile

| Via the Unassigned Tab | OR | Via a Main Study Workspace |
|---|----|--|
| <ol style="list-style-type: none"> 1. Click “Submissions” 2. Click “Unassigned” 3. Click any Department Name to go to the space to search by person name 4. From the Find menu, select “Contacts” 5. Type in the first and last name, on the left 6. Click “Find Now” 7. Click the person name in the results provided to view details | | <ol style="list-style-type: none"> 1. Navigate to the main study workspace for the preferred PI 2. Click the History Tab 3. Click the name of any person that appears in blue |
|  | |  |

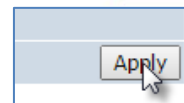
2. Make edits to the Research Profile

- Within the profile space, click the “select view” dropdown
- Select “Research Profile”
- Once selected, the Research Profile screen will appear
- Click “yes” or “no” for question 1, as appropriate



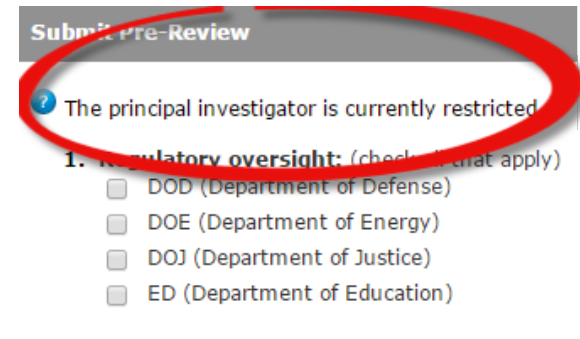
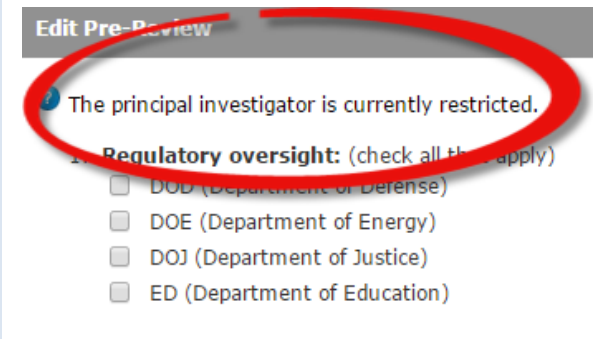
3. Apply the changes


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 |
|---|----|--|
|  <p>Submit Pre-Review</p> <p>The principal investigator is currently restricted.</p> <p>1. Regulatory oversight: (check all that apply)</p> <ul style="list-style-type: none"> <input type="checkbox"/> DOD (Department of Defense) <input type="checkbox"/> DOE (Department of Energy) <input type="checkbox"/> DOJ (Department of Justice) <input type="checkbox"/> ED (Department of Education) | |  <p>Edit Pre-Review</p> <p>The principal investigator is currently restricted.</p> <p>1. Regulatory oversight: (check all that apply)</p> <ul style="list-style-type: none"> <input type="checkbox"/> DOD (Department of Defense) <input type="checkbox"/> DOE (Department of Energy) <input type="checkbox"/> DOJ (Department of Justice) <input type="checkbox"/> 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

