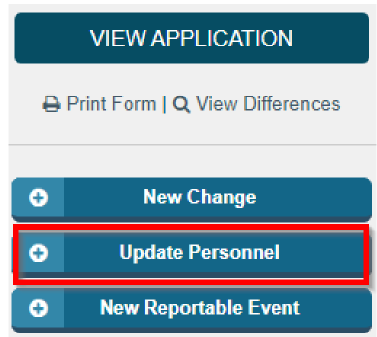
Self-service Tool for Personnel Updates

Overview

Personnel updates are now available as a standalone activity. The activity supports all changes to study team members, roles, and edit access **with the exception of changes to the PI**. Study teams can still make personnel updates using a Change application and must still do so for any **PI changes**.

Open Update Personnel Activity

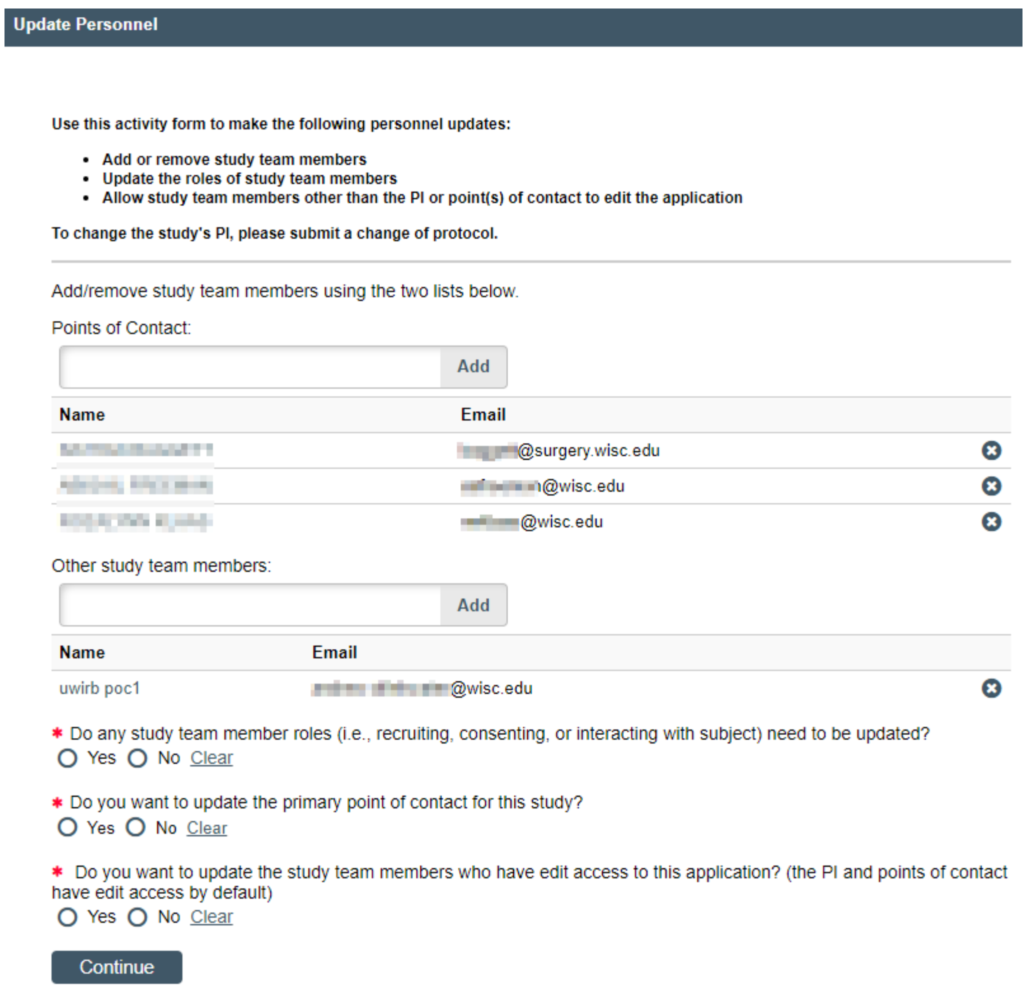
Navigate to your application. The Update Personnel activity is located in the left side column.



Identify Members to Add or Update

Use the activity form to make personnel updates including:

- Add or remove members
- Update roles
- Change edit access



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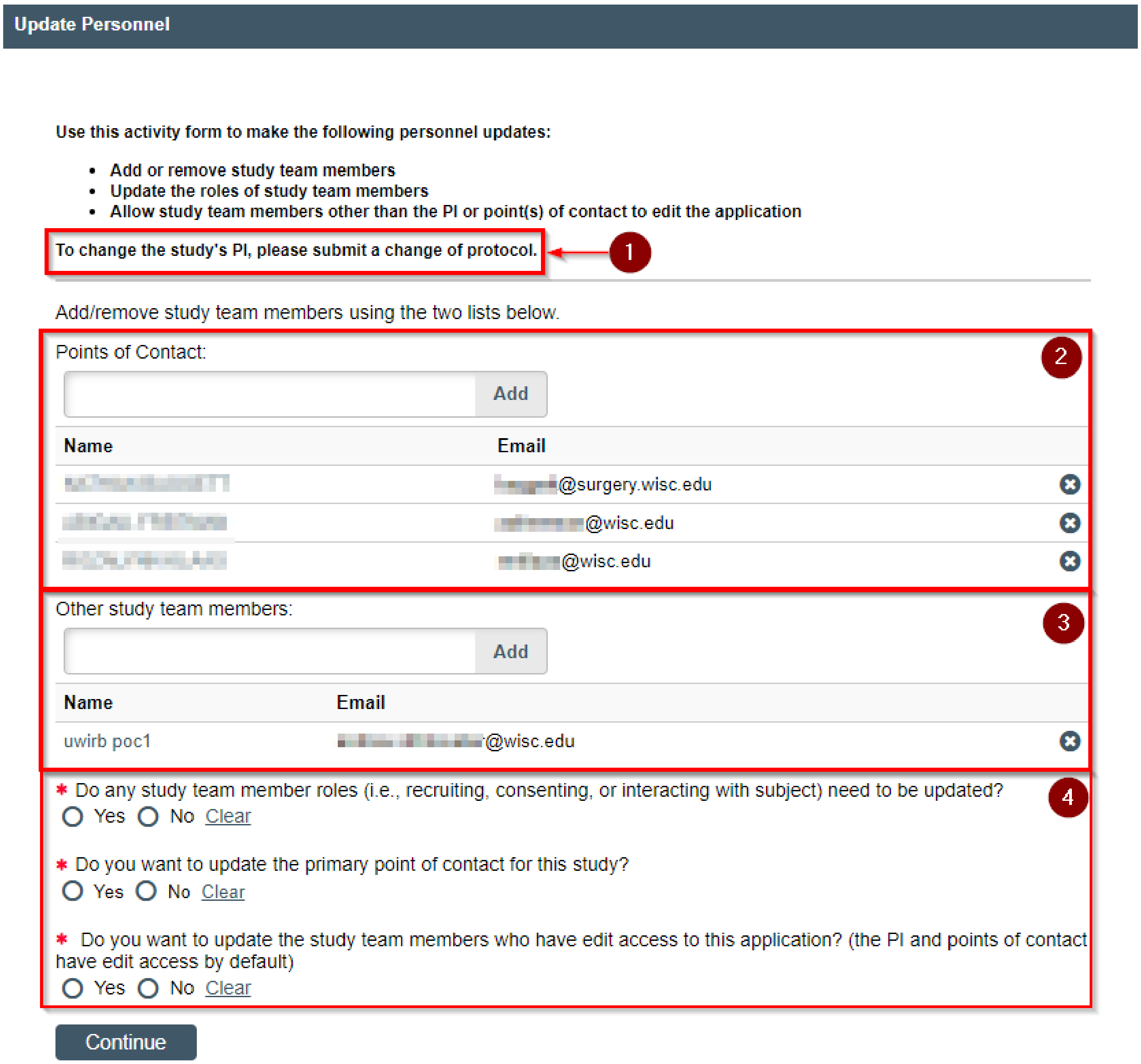

Update Personnel

Use this activity form to make the following personnel updates:

- **Add or remove study team members**
- **Update the roles of study team members**
- **Allow study team members other than the PI or point(s) of contact to edit the application**

To change the study's PI, please submit a change of protocol. 1

Add/remove study team members using the two lists below.

Points of Contact: 2

Add

Name	Email
[redacted]	[redacted]@surgery.wisc.edu
[redacted]	[redacted]@wisc.edu
[redacted]	[redacted]@wisc.edu

Other study team members: 3

Add

Name	Email
uwirb poc1	[redacted]@wisc.edu

* Do any study team member roles (i.e., recruiting, consenting, or interacting with subject) need to be updated? 4

Yes No Clear

* Do you want to update the primary point of contact for this study?

Yes No Clear

* Do you want to update the study team members who have edit access to this application? (the PI and points of contact have edit access by default)

Yes No Clear

Continue

(1) Changes to a study's PI require a Change of Protocol application

(2) Update a study's Points of Contact here. Up to four POCs may be listed for an application.

(3) Add study members that <u>do not serve as POC</u> here.

(4) The questions here will dictate how the following page appears.

   a. Answering "yes" to these questions will populate the relevant update sections on the following page.

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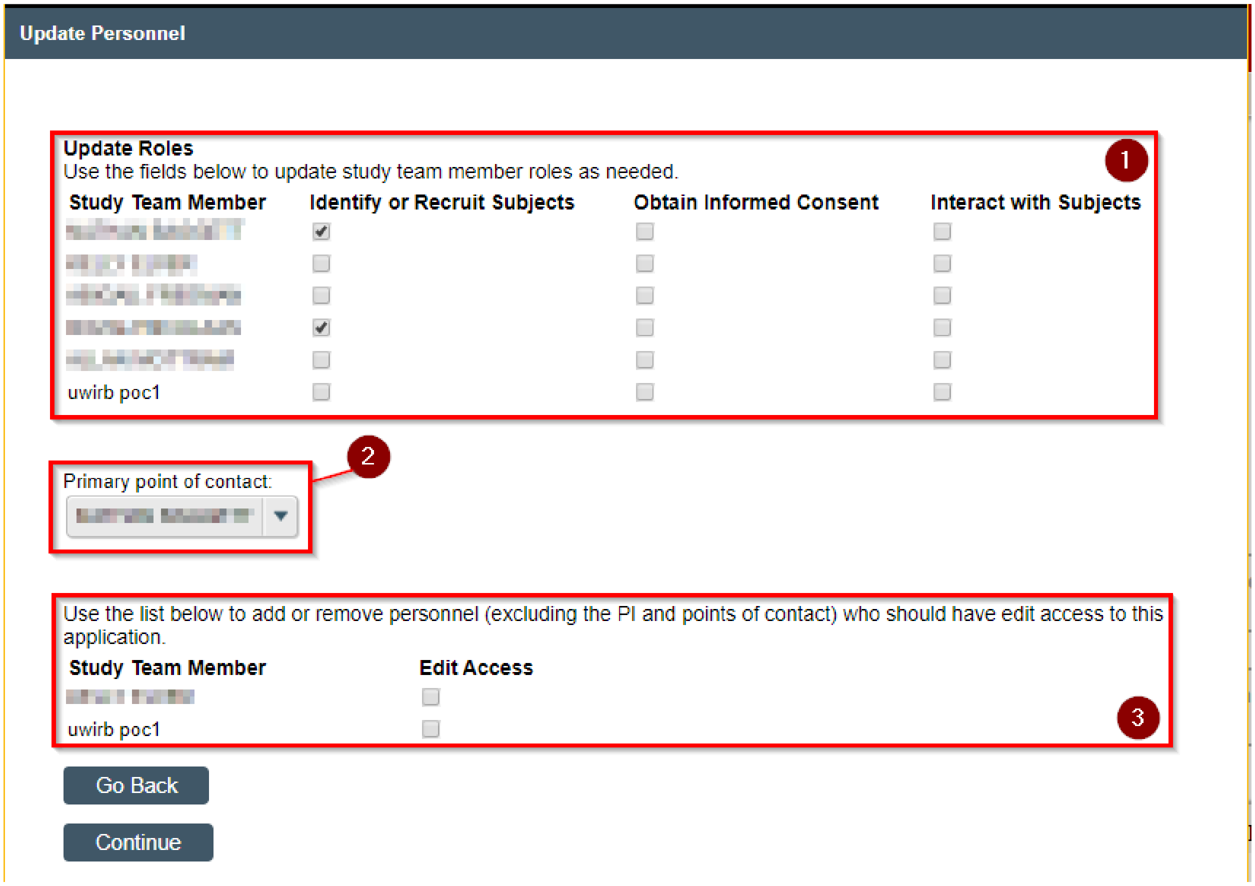
Update Roles, Primary POC, and Edit Access

NOTE - The below sections (Update Roles, Primary POC, Edit Access) appear based off the questions answered on the first page of the activity. If a section is not appearing as expected, use the Go Back button to update your answers.



(1) Update study team members' roles here.

(2) Update a study's Primary point of contact here.

(3) Update edit access for study team members not listed as a POC.

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Regulatory Questions

The final page contains four questions relating to regulatory requirements including training, conflicts of interest, ongoing study activities, application accuracy, and PI consent for personnel changes.

Update Personnel

1 * Do all personnel have the appropriate training, qualifications, and oversight to perform their duties on this study?

Please consult the appropriate IRB office if you have any questions about requirements for training, qualifications, or oversight.

Yes No Clear

2 * Do any study team members have a potential conflict of interest (COI) related to the conduct of the study according to institutional policy?

Please contact the COI program for information about institutional policy and the disclosure process:
https://research.wisc.edu/compliance-policy/outside-activities-reporting/

Yes No Clear

3 * Does the currently approved IRB application describe all the study activities to be conducted by all study team members?

Yes No Clear

4 * Do you certify that (1) the information presented in this application is accurate; and (2) if the application is being submitted on behalf of the Principal Investigator (PI) rather than the PI, the information presented was done so with the PI's agreement?

To complete this personnel update, click OK below. Please note that ARROW will not save your work on this update if you close this window. You will need to start a new update if you are not ready to click OK and submit at this time.

Yes No Clear

Go Back

(1) Answer **yes** to this question if all study team members have up to date training.

* Do all personnel have the appropriate training, qualifications, and oversight to perform their duties on this study?

Please consult the appropriate IRB office if you have any questions about requirements for training, qualifications, or oversight.

Yes No Clear

All study team members must have the appropriate training, qualifications, and oversight to perform their duties on this protocol before they can be added.

(2) Answer **no** to this question if the study team has no potential conflicts of interest related to the study.

* Do any study team members have a potential conflict of interest (COI) related to the conduct of the study according to institutional policy?

Please contact the COI program for information about institutional policy and the disclosure process:
https://research.wisc.edu/compliance-policy/outside-activities-reporting/

Yes No Clear

Additional IRB review is required when study team members have a potential COI and this personnel update cannot be submitted at this time. Please contact the appropriate IRB office for guidance.

(3) Answer yes here to indicate that the IRB application is reflective of all study activities.

* Does the currently approved IRB application describe all the study activities to be conducted by all study team members?

Yes No Clear

If revisions are needed to the IRB application to add or remove study activities, please submit a change of protocol.

(4) Answer **yes** here to certify that all personnel updates are accurate and done with PI approval. Click **Okay** to submit.