

## Personnel Modification Guidance

**There are four different options for submitting personnel modifications in the eIRB system.**

1. Go to eIRB
2. Add Researcher (Non-Amendment Personnel Modification)
  - a. Changes to personnel can be made within the Research Team panel when the most recent submission is in an approved state.
  - b. NOTE: This method cannot be used if a new stage is under review (e.g., a continuing review, amendment or CR amendment). Utilize the Multi-Protocol Personnel Amendment feature to add personnel while a new stage is under review.
3. Under Panel Shortcuts (on the left menu) click on Research Team to scroll to the Research Team panel.
4. Click Add Researcher and the Add Researcher form will appear.
5. Click to add their project role and determine if they need edit access to the eIRB application, and/or need to be a designated study contact. Note: it is not recommended that external individuals be given edit access to the eIRB application.
6. If the personnel is responsible for the design, conduct, or reporting of research, the COI Disclosure box should be checked.
7. Complete the rest of the fields as necessary and click save.
8. Once the individual is added to the protocol, please refer to the Allowed to Work on Protocol and Review Status columns on the Research Team table. Note that the Allowed to Work on Protocol will identify requirements that may be incomplete such as a COL disclosure and CITI training.
9. Personnel may not participate on the protocol while these requirements are pending. The system will auto update when these are completed.

**Certain personnel modifications require review by the IRB. The Review Status column will indicate whether a review by the IRB is needed. If it is not needed, it will say “Review Not Required”. If review is required, the personnel cannot participate on the protocol until the Review Status is Approved.**

10. With the exception of the PI, key personnel can also be removed from the Research Team table.
  - a. Click the red trash can icon in the Action column, next to the listed personnel.

### Multi-Protocol Personnel Amendment

**This tool allows the user to add research personnel on a single or multiple protocols at once. However, there are a few restrictions:**

- A. This tool does not permit PI changes. PI changes must be made via a standard protocol amendment request because they require IRB review.
- B. The person must have an existing account in eIRB. For example, undergraduate students may not already have an eIRB account if they have never been added to an eIRB protocol before.

- C. The individual must be internal to Penn. External individuals cannot be added using this tool because they require IRB review.
- D. This tool does not permit personnel deletions. Use the Personnel Tracker instead.

1. Click on the eIRB Menu and select the Multi-Protocol Personnel Amendment from the dropdown menu.
2. Note the blue instructional box, these will detail when it is/is not appropriate to use this tool.
3. In the Add Researcher menu, find the personnel you want to add.
4. Under Project Role select “Researcher, eIRB” and add their project role.
5. Determine if they need edit access to the eIRB application, and/or need to be designated a study contact.
6. If the personnel is responsible for the design, conduct, or reporting of research, the COI Disclosure box should be checked.
7. Click “add” when you have completed relevant fields.
8. Scroll down and click “Add” to add the individual to one or more protocols.

### **Request New Amendment**

**The Request New Amendment function should be used in the following situations:**

1. PI changes; and
2. Any other personnel changes that necessitate study document revisions.

This function may be used to request other personnel changes; however, the IRB recommends using other functions presented in this guidance, so that teams are not prevented from submitting subsequent modifications while the personnel modification is under review.

1. At the top of the eIRB protocol, find the New Amendment box and click Request. Select Amendment under Type.
2. Select Research Team as the type of amendment. If other changes are being made at the same time, apply as many amendment types as applicable.
3. Complete the rest of the Amendment Modal.
4. Click save.

### **Using Personnel Tracker**

**This tool has two main functions:**

- A. View the protocols a research personnel has been added to; and
- B. With the exception of the PI, remove research personnel from a single protocol or multiple protocols at once.

1. In the eIRB menu dropdown, click “Personnel Tracker”.
2. Filter by Research Team Member, Protocol Number, Title, etc.
3. The table will show name, protocol, roles, and status, as denoted by timer icons.

4. To remove personnel, hover over the personnel's role on the protocol. Click remove.
5. To remove personnel, hover over the personnel's role on the protocol. Click remove.