

## Updating the Principal Investigator

During proposal creation the PI defaults to the record creator’s name. The PI should be updated during this step by clicking Change in Step 0. If this is not updated to the correct PI before the proposal is created, the below are the steps to take in order to update the PI.

## Proposal Development

- 1) From the Personnel tab, you will need to add the new PI with a role of “Co-PD/PI” as a placeholder. Click Save to add. In this example, we are adding Gina Billiot as the new PI.

- 2) Check the toggle next to the correct PI/s name under the PI column.

Senior/Key		MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
PI	NAME/ROLE						CALENDAR	ACADEMIC	SUMMER			
<input checked="" type="checkbox"/>	(L13) Mike the Tiger PD/PI * Certifications and Training				<input checked="" type="checkbox"/>	Louisiana State University LSUAM   Sch of VETM   Pathobiological Sciences	2.5	0	0			
<input checked="" type="checkbox"/>	Gina Larpenter Billiot Co-PD/PI Certifications and Training				<input checked="" type="checkbox"/>	Louisiana State University LSUAM   ORED   Office of Sponsored Programs	0	0	0			

Legend:  Prime

3) You will receive the below confirmation message. Click Save.

Personnel Type: Key

Name (Last, First):  Role: Co-PD/PI

Change PI (Changing this person to Principal Investigator will change the previous PI's role.)

Save Close

PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	CALENDAR	ACADEMIC	SU
<input type="radio"/>	(113) Mike the Tiger PD/PI * Certifications and Training				<input checked="" type="checkbox"/>	Louisiana State University LSUAM   Sch of VETM   Pathobiological Sciences	2.5	0	
<input checked="" type="radio"/>	Gina Larpenter Billiot Certifications and Training				<input checked="" type="checkbox"/>	Louisiana State University LSUAM   ORED   Office of Sponsored Programs	0	0	

Legend: Prime

4) The previous PI will no longer have a role under their name. You will either need to update to a new role as appropriate or remove the person using the blue remove arrow.

PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
							CALENDAR	ACADEMIC	SUMMER			
<input checked="" type="radio"/>	Gina Larpenter Billiot PD/PI * Certifications and Training				<input checked="" type="checkbox"/>	Louisiana State University LSUAM   ORED   Office of Sponsored Programs	0	0	0			
<input type="radio"/>	(113) Mike the Tiger Certifications and Training				<input checked="" type="checkbox"/>	Louisiana State University LSUAM   Sch of VETM   Pathobiological Sciences	2.5	0	0			

Legend: Prime

- Step 4a – To Remove, click on blue arrow next to individual’s name in the Remove column. See screen shot above. Removing the personnel will open the below confirmation message. Make sure a check mark is in each year of the budget and click Remove.

Remove From:


Element	Description	Increment	Increment Type	Role	Department	Remove
	Prime	Budget Period 1	New*		LSUAM   Sch of VETM   Pathobiological Sciences	<input checked="" type="checkbox"/>
	Prime	Budget Period 2	New*		LSUAM   Sch of VETM   Pathobiological Sciences	<input checked="" type="checkbox"/>
	Prime	Budget Period 3	New*		LSUAM   Sch of VETM   Pathobiological Sciences	<input checked="" type="checkbox"/>

Remove

- Step 4b – To update the role of the individual, click on their name on the Personnel tab.

Senior/Key

PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT
⋮	Gina Larpenter Billiot PD/PI * Certifications and Training	✉		?	☑	Louisiana State University LSUAM   ORED   Office of Sponsored Programs
⋮	(L13) Mike the Tiger Certifications and Training	✉	⚠	✓	☑	Louisiana State University LSUAM   Sch of VETM   Pathobiological Sciences

Legend:  Prime

- Under the Role dropdown, select the correct role for the individual. Click Save and then Close.

Contact Information for - (L13) Mike the Tiger

Salutation: [ ] First: (L13) Mike Middle: the Last: Tiger Suffix: [ ]

Title: Faculty

Address: 217 Thomas Boyd Hall

City: Baton Rouge State: Louisiana Zip: 70803-0100

Country: U.S.A. Phone: (225)578-9999 Email: mtsbatesting@lsu.edu

Sponsor Credential: Other (Specify) [ ]

Proposal Element: Prime: AM200049 Department: LSUAM | Sch of VETM | Pathobiological Sciences Personnel Type: Key Role: [ ] Specified Role: [ ]

Role dropdown menu options: Co-PD/PI, Faculty, Post Doctoral, Post Doctoral Associate, Post Doctoral Scholar, Other Professional, Graduate Student, Undergraduate Student, Technician, Consultant, Co-Investigator, Other (Specify)

Buttons: Save, Close

- 5) After correcting the personnel tab, you will need to update the Setup Questions tab to reflect the correct PI Department and Associated Departments. Both can be viewed by Department Admins and OSP staff by clicking “Show” at the top Right. Make sure Completed tab is unchecked so you can edit.

Done Save test

Gina Larpenter Billiot - LSUAM | Sch of VETM | Pathobiological Sciences (LA Board of Regents (BOR))

Proposal AM200049

Setup Questions

LSU Questionnaire

Budget

Personnel

Internal Uploads & Routing

Tasks

Show Completed

- 6) The Associated Departments and PI Departments are under the General Proposal Properties section once you click Show. The PI department should have updated with the new PI's department. If not, select Add next to PI Departments and add the appropriate department.

General Proposal Properties

Will your proposal involve the use of Human Subjects?  Yes  No

Will your proposal involve the use of Laboratory Animals?  Yes  No

Will your proposal involve multiple principal investigators?  Yes  No

Will your proposal be a training grant?  Yes  No

Associated Departments

**PI Departments**

Associated Centers/Programs

Link to existing proposal

LSUAM | Sch of VETM | Pathobiological Sciences

LSUAM | ORED | Office of Sponsored Programs

- 7) Make sure all investigator departments are included under Associated Departments. Click Add next to Associated Departments.

General Proposal Properties

Will your proposal involve the use of Human Subjects?  Yes  No

Will your proposal involve the use of Laboratory Animals?  Yes  No

Will your proposal involve multiple principal investigators?  Yes  No

Will your proposal be a training grant?  Yes  No

**Associated Departments**

PI Departments

Associated Centers/Programs

Link to existing proposal

LSUAM | Sch of VETM | Pathobiological Sciences

LSUAM | ORED | Office of Sponsored Programs

- 8) Type in the name of the missing departments, select from options and click Select. Repeat as necessary.

Department

LSUAM | ORED | Office of Sponsored Programs

Filter by Institution

Louisiana State University and Agricultural and Mechanical College

9) Once all Associated Departments have been added, select the toggle next to the PI's primary department. If you need to remove a department, click Remove next to name.

General Proposal Properties

Will your proposal involve the use of Human Subjects?  Yes  No

Will your proposal involve the use of Laboratory Animals?  Yes  No

Will your proposal involve multiple principal investigators?  Yes  No

Will your proposal be a training grant?  Yes  No

Associated Departments  LSUAM | ORED | Office of Sponsored Programs [Remove](#)  
[Add](#)

PI Departments  LSUAM | Sch of VETM | Pathobiological Sciences  
 LSUAM | ORED | Office of Sponsored Programs [Remove](#)  
[Add](#)

Associated Centers/Programs  None [Identified](#) [Look Up](#)

Link to existing proposal

10) Click Save in top left and then check "Complete" in top right.