



The University of Vermont Sponsored Project Administration

How to Fix Wrong PI Name on a New Proposal (Non NIH S2S)

updated 07-13-17

It happens on occasion that the person start a new proposal sometimes forget to change the PI name from his/her name to the actual PI name. The below steps show how to correct the PI name in InfoEd.

How to Fix when the Wrong PI Name is Selected at Proposal Creation

Proposal 32516
Done Save

How to Change the PI on Non-NIH S2S Proposal
Catherine Raley Condon - Sponsored Project Administration (ABC, Inc. Foundation)

Personnel

Add Personnel [show]

PI	Name/Role	Mail	Alert	Order	Organization / Department	CV/Biosketch	Current/Pending Support	Remove Person
1	Catherine Raley Condon Co-PI				The University of Vermont and State Agricultural College Sponsored Project Administration			

Legend:

In this example, Catherine Condon started the proposal but she neglected to change the PI name to Joshua Tyack in the New Proposal Questionnaire.

Steps to Make Correction

Proposal 32516
Done Save

How to Change the PI on Non-NIH S2S Proposal
Catherine Raley Condon - Sponsored Project Administration (ABC, Inc. Foundation)

Personnel

Add Personnel [hide]

Proposal Element

Form

Personnel Type

Key

Create Profile

Name (Last, First)

Role

Save

PI	Name/Role	Mail	Alert	Order	Organization / Department	CV/Biosketch	Current/Pending Support	Remove Person
1	Catherine Raley Condon Co-PI				The University of Vermont and State Agricultural College Sponsored Project Administration			
2	Joshua Tyack Co-PI				The University of Vermont and State Agricultural College Sponsored Project Administration			

Click "Add Personnel – [show] button

Begin typing in PI name until name appears and then select the name

It does not matter which role you apply at this point

Click Save

Proposal 32516 **How to Change the PI on Non-NIH S2S Proposal** Catherine Ruley Condon - Sponsored Project Administration (ABC, Inc. Foundation)

Done Save

Setup Questions
Personnel
Internal Documents
Finalize

Support
Show Help

Personnel Completed

Add Personnel [show] Edit Mode

Key	PI	Name/Role	Mail	Alert	Order	Organization / Department	CV/Biosketch	Current/Pending Support	Remove Person
<input type="radio"/>	1	Catherine Ruley Condon PI/PI				The University of Vermont and State Agricultural College Sponsored Project Administration			
<input checked="" type="radio"/>	1	Joshua Tyack Co-PI/PI				The University of Vermont and State Agricultural College Sponsored Project Administration			

Legend:
1 Prime
FCOI Check
Date to see

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

Click the radio dial next to the correct PI's name.

A new window will open letting you know that "Changing this person to Principal Investigator will change the previous PI's role.)

Click Save.

Then click Close.

Proposal 32516 **How to Change the PI on Non-NIH S2S Proposal** Joshua Tyack - Sponsored Project Administration (ABC, Inc. Foundation)

Done Save

Setup Questions
Personnel
Internal Documents
Finalize

Support
Show Help

Personnel Completed

Add Personnel [show] Edit Mode

Key	PI	Name/Role	Mail	Alert	Order	Organization / Department	CV/Biosketch	Current/Pending Support	Remove Person
<input checked="" type="radio"/>	1	Joshua Tyack PI/PI				The University of Vermont and State Agricultural College Sponsored Project Administration			
<input type="radio"/>	1	Catherine Ruley Condon PI/PI				The University of Vermont and State Agricultural College Sponsored Project Administration			

Next, decide if the "wrong PI" should be removed or saved.

To remove, click the blue remove button.

Or, if the person should stay on the proposal... you'll have to assign a new role

Form fields include: Contact Information for Catherine Ruley Condon, Address (217 Waterman Building, 85 South Prospect Street, Burlington, VT 05405-0160), Phone (802-656-5560), Email (Catherine.Ruley@uvm.edu), and a bottom section with 'Personnel Type' (Key) and 'Role' dropdowns. A red box highlights the bottom section, and a red arrow points to the 'Role' dropdown.

Click on the person's Name

A separate window will open

Select Personnel Type and Role from box at bottom of window

Click Save.

Click Close.

The 'Personnel' window displays a table with columns: PI, Name/Role, Mail, Alert, Order, Organization / Department, CV/Biosketch, Current/Pending Support, and Remove Person. The first row is for Joshua Tyack (PI 1), and the second row is for Catherine Ruley Condon (PI 2). A red arrow points to the first row. The 'Legend' section at the bottom shows '1 Prime'.

Now, you will see that the Correct PI name is showing on Top of Proposal Record and in Personnel List.

Associated Department

Important: By changing the PI, you are not automatically also changing the Proposal Associated Department).

So if the New Principal Investigator is in a different department, be sure to go back to the Setup Questions Tab and update the Proposal Associate Department to reflect the correct department.