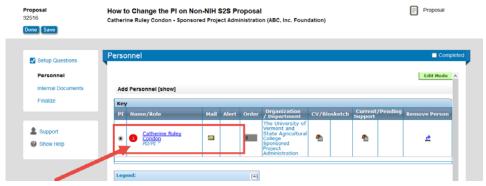


How to Fix Wrong PI Name on a New Proposal (Non NIH S2S)

updated 07-13-17

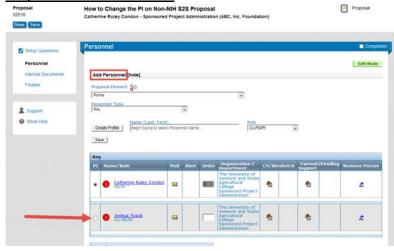
It happens on occasion that the person start a new proposal sometimes forget to change the PI name from his/her name to the actual PI name. The below steps show how to correct the PI name in InfoEd.

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



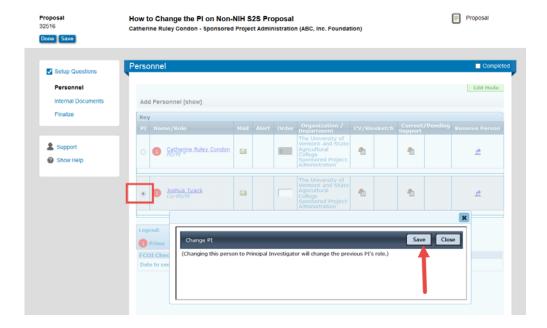
In this example, Catherine Condon started the propsoal but she neglected to change the PI name to Joshua Tyack in the New Proposal Questionnaire.

Steps to Make Correction



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

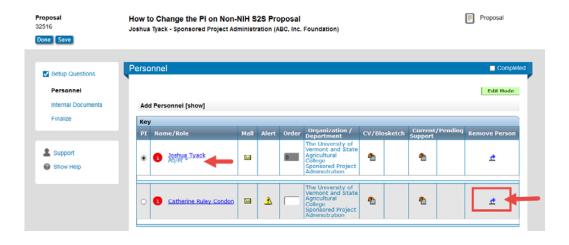


Click the radio dial next to the correct PI"s name.

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

Click Save.

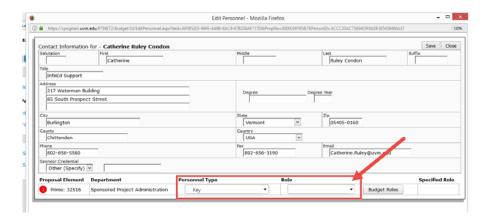
Then click Close.



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

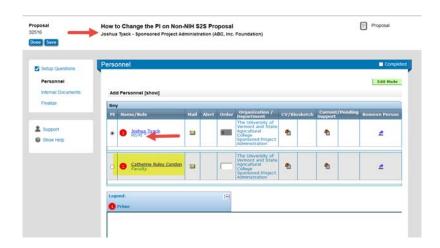


Click on the person's Name

A separate window will open

Select Personnel Type and Role from box at bottom of window Click Save.

Click Close.



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.