

# How To...

## Change Personnel on Animal Study

This guidance will outline how to change personnel (add or remove) on an *approved* Animals Study application. After an application is approved, personnel changes must be done through the Change Personnel function listed under “My Activities” and *not* via an amendment, with one exception: changing the Principle Investigator.


*Changing the Principal Investigator **cannot** be done via the process outlined below. To change the Principal Investigator on an application, you must create and submit an amendment.*

### Procedure:

1. Open the study application that requires a change of personnel.
2. Under “My Activities”, click “Change Personnel”.

The screenshot shows the ARISE (Alberta Research Information Services) web application interface. The top navigation bar includes the University of Alberta logo, the text 'ARISE Alberta Research Information Services', and a user greeting 'Hello, Hal Hartman'. Below the navigation bar, there are tabs for 'Dashboard' and 'Home'. The main content area is divided into a left sidebar and a main panel. The sidebar contains a 'Current State' section with 'Approved' selected, and a 'My Activities' section with several options. The 'Change Personnel' option is circled in red, and a red arrow points from it to the 'Change Personnel' link in the main panel. The main panel displays details for a study application 'Study: Test AUP (AUP00003012)'. The details include: Description: Sample Application for Demonstration or Video; Principal Investigator: Hal Supervisor; ACUC Coordinator: Kimberley Kordov; Expiration Date: Wednesday, March 18, 2020; Letter of Approval: View; 4th Year/Full Renewal Due: 2023; ACUC Committee: ACUC Health Sciences 2. Below the details is an 'Animal Numbers' section and a 'History' table. The 'History' table has tabs for 'PAA's', 'Reviewer Notes', 'Attachments', 'PAM Log', and 'Change Log'. The 'Change Log' tab is active, showing a table with columns 'Activity', 'Author', and 'Activity Date'. The table contains the following entries:


Activity	Author	Activity Date
PAA Completed	Supervisor, Hal	3/19/2019 3:55 PM
PAA Opened	Supervisor, Hal	3/19/2019 3:43 PM
Study : Approved		3/19/2019 3:41 PM
Set Expiration Date	Kordov, Kimberley	3/19/2019 3:38 PM


3. You can now **add** new personnel with “edit access” to the application (1.0 below) or “view access only” (2.0 below). Click the  button.

**Change Personnel**


**Change Personnel**

**1.0 Research and Administrative Personnel – with EDIT access** *(people listed here will be able to make changes to this study online)*




Name	Area of Responsibility with Animals	Positions
Kimberley Kordov	animal care	Research Associate 

**2.0 Research and Administrative Personnel – with VIEW access only**



Name	Area of Responsibility with Animals	Positions
There are no items to display		

**3.0 Other/External Study Team** *(co-investigators, supervising team, other study team members – NO access to this application, will receive no notification).*



Last Name	First Name	Organization	Role/Area of Responsibility	Phone	Email
There are no items to display					

OK
Cancel

4. You can also add someone to the Study Team, which is a “free text” field. *However*, people listed here will **not** have “view” **or** “edit” access to the application.
5. After clicking the Add button, you will see a pop up to enter personnel information.

Add AREO\_Study\_Type\_Research Personnel

Add/Edit Research and Administrative Personnel

1.0 \* Name:

2.0 \* Indicate Area of Responsibility with Animals (e.g. animal care, animal ordering, surgery, colony maintenance, husbandry, monitoring, etc.)

3.0 \* Positions on Project (select all that apply)

Name

Principal Investigator

Co-Investigator

Research Associate

Technician

Research Administrative Staff

Lab Manager

Post-Doctoral Fellow

Medical Resident

Graduate Student

Undergraduate

Other

\* Required

OK

OK and Add Another

Cancel

- When adding personnel with edit or view access, the above window pops up. Start typing the name of your personnel in the Name field and the system will search and display a list of names just below for your selection. If you type the name of your personnel and the system displays "No such user", then there are one of two reasons, or both, as to why your personnel does not show on the list:

- a. Your personnel does not have a profile because they have not logged into the system, which will create their user profile.
- b. Your personnel does not have the role you are trying to add them into (ie. Human Research Co-Investigator role or the Study Coordinator role).

If you receive the “No such user” message, do **not** click “Create new contact” because that function will not allow you to add them. Instead, your personnel must log in to the online system and request an additional role.

- Please refer to the [video tutorials](#) for instructions on how to update your profile or on Requesting an Additional Role.

**Add AREO\_Study\_Type\_Research Personnel**

*Add/Edit Research and Administrative Personnel*

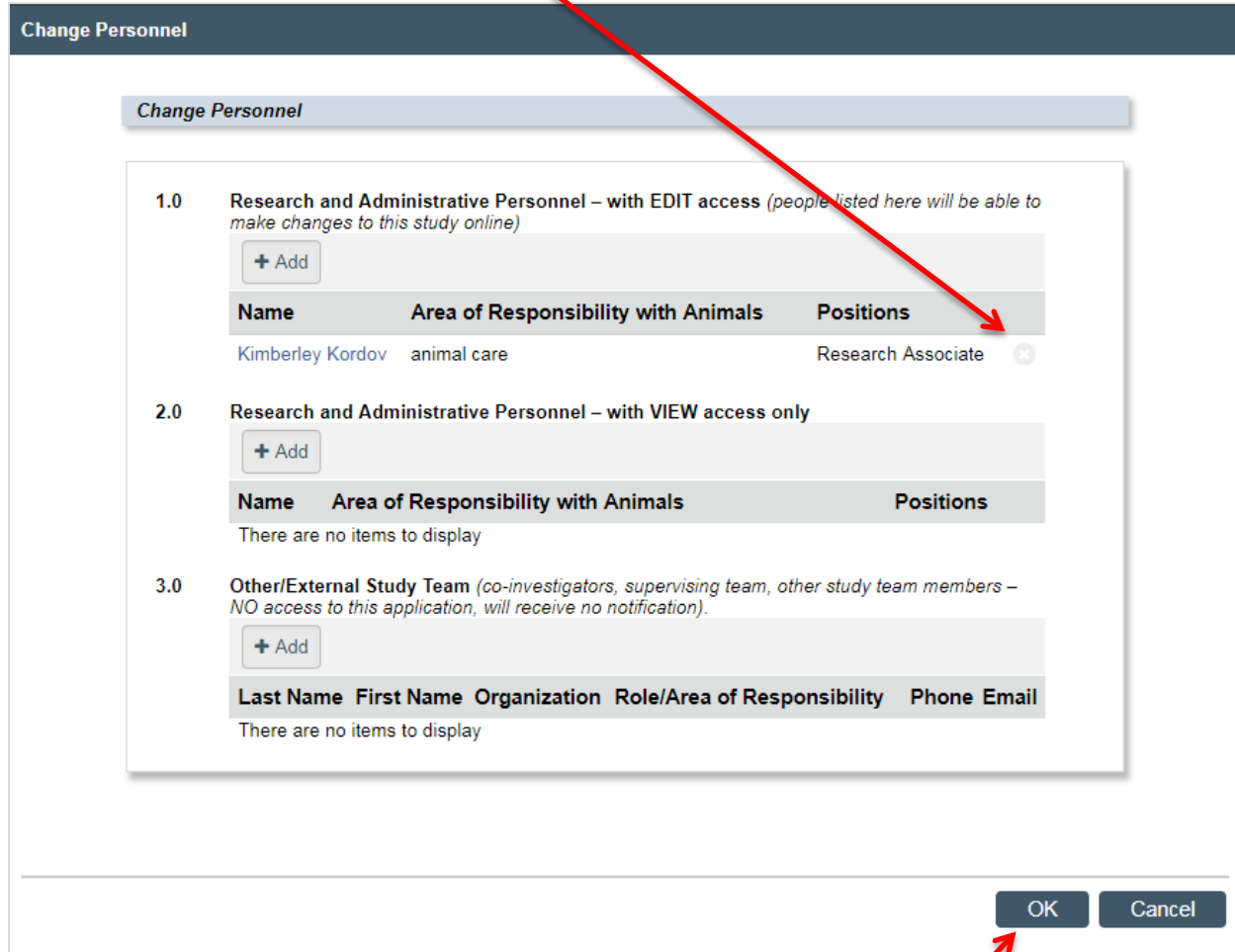
1.0 \* Name:  
kabal

2.0  
No such user. [Create new contact](#) (e.g. animal care, animal ordering, surgery, etc.)

3.0 \* Positions on Project (select all that apply)

Name	
<input type="checkbox"/>	Principal Investigator
<input type="checkbox"/>	Co-Investigator
<input type="checkbox"/>	Research Associate
<input type="checkbox"/>	Technician
<input type="checkbox"/>	Research Administrative Staff

- To **remove** personnel who are no longer working on your study, click the “X” to the right of that person’s name.




**Change Personnel**

*Change Personnel*

**1.0 Research and Administrative Personnel – with EDIT access** *(people listed here will be able to make changes to this study online)*

+ Add

Name	Area of Responsibility with Animals	Positions
Kimberley Kordov	animal care	Research Associate 

**2.0 Research and Administrative Personnel – with VIEW access only**

+ Add

Name	Area of Responsibility with Animals	Positions
There are no items to display		

**3.0 Other/External Study Team** *(co-investigators, supervising team, other study team members – NO access to this application, will receive no notification).*

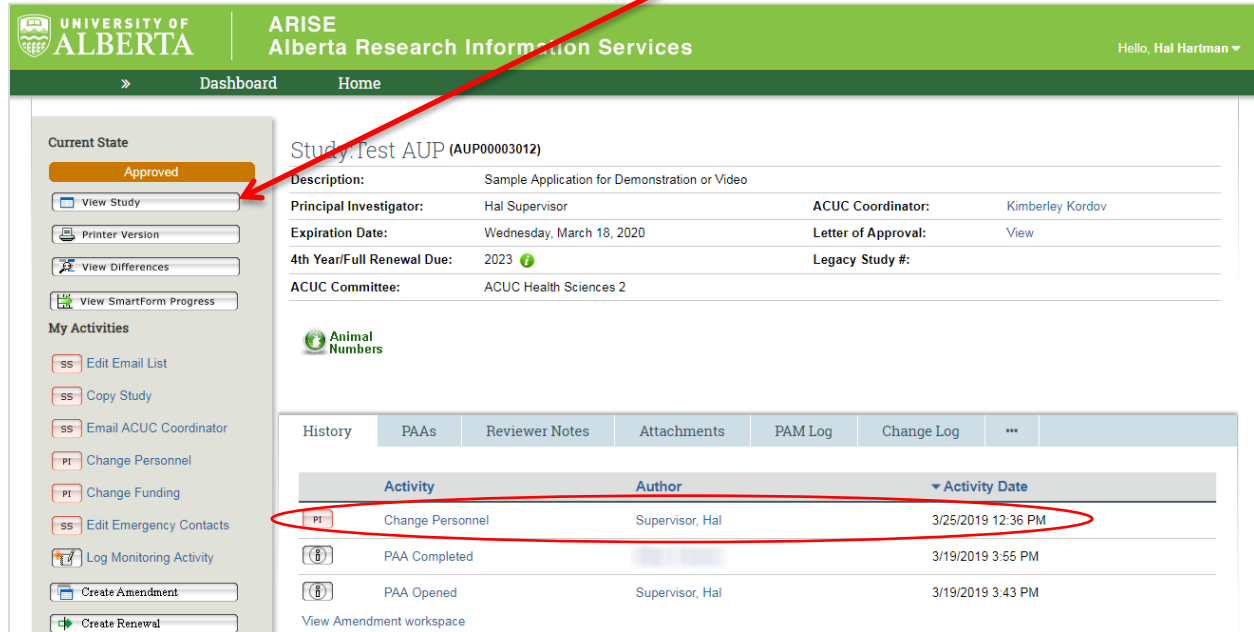
+ Add

Last Name	First Name	Organization	Role/Area of Responsibility	Phone	Email
There are no items to display					

OK Cancel

- To submit the Change Personnel request after you have completed adding/deleting personnel, click “OK”.

9. The application history should reflect that the Change Personnel activity has been completed. You can also check section 1.1 in “View Study” to make sure that the study personnel changes are reflected there.



UNIVERSITY OF ALBERTA | ARISE Alberta Research Information Services | Hello, Hal Hartman

Dashboard Home

**Current State**  
 Approved  
 View Study  
 Printer Version  
 View Differences  
 View SmartForm Progress

**My Activities**  
 Edit Email List  
 Copy Study  
 Email ACUC Coordinator  
 Change Personnel  
 Change Funding  
 Edit Emergency Contacts  
 Log Monitoring Activity  
 Create Amendment  
 Create Renewal

**Study: Test AUP (AUP00003012)**  
 Description: Sample Application for Demonstration or Video  
 Principal Investigator: Hal Supervisor | ACUC Coordinator: Kimberley Kordov  
 Expiration Date: Wednesday, March 18, 2020 | Letter of Approval: View  
 4th Year/Full Renewal Due: 2023 | Legacy Study #:  
 ACUC Committee: ACUC Health Sciences 2

Animal Numbers

History	PAA	Reviewer Notes	Attachments	PAM Log	Change Log	...
Activity	Author	Activity Date				
Change Personnel	Supervisor, Hal	3/25/2019 12:36 PM				
PAA Completed		3/19/2019 3:55 PM				
PAA Opened	Supervisor, Hal	3/19/2019 3:43 PM				

View Amendment workspace

*If you have any difficulties with the processes outlined above, please contact the Research Ethics Office by email ([reoffice@ualberta.ca](mailto:reoffice@ualberta.ca)) or call 780-492-0459.*