

How to Switch Site Investigator Roles

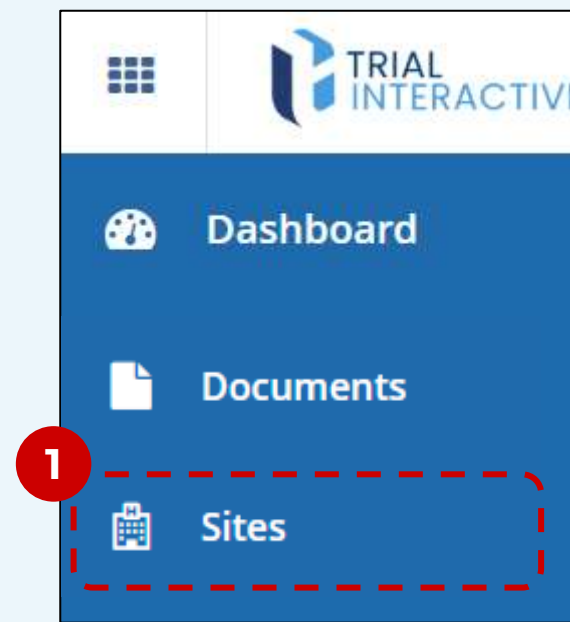
TI version 10.8

APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eTMF
- eISF

In some circumstances, changing a contact designation – for example ‘Principal Investigator’ - can result in loss of visibility of the documents previously provided by the contact, both in Completeness Reports and Document Views. This short guide will demonstrate how to change contact designations in a manner that preserves full visibility of provided documents.

1 Enter a room and open the **Sites** module in the eTMF/Collaborative Workspace context.



2 Select **one** Site.

1 - 2 of 2 (1 selected)

<input type="checkbox"/>		Institutio...	Site Status
<input type="checkbox"/>	...	Toronto H...	ACTIVE
<input checked="" type="checkbox"/>	...	Woodridg...	ACTIVE

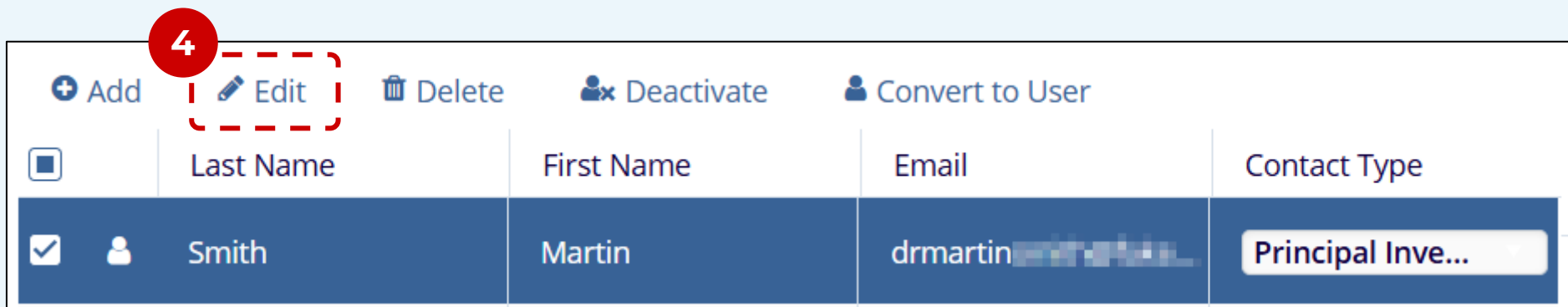
3 If necessary, pull up the Site Profile panel at the bottom of your screen. Switch to the **Contacts** tab.



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- 4 Let's define a scenario: the current Principal Investigator is leaving, with a Sub-Investigator taking their place. Select the current PI and click **Edit**.



	Last Name	First Name	Email	Contact Type
<input checked="" type="checkbox"/>	Smith	Martin	drmartin@...@...@...	Principal Inve...

- 5 Using the Contact Type selector, pick the new role for this contact: **Former Principal Investigator**.



Contact Type *

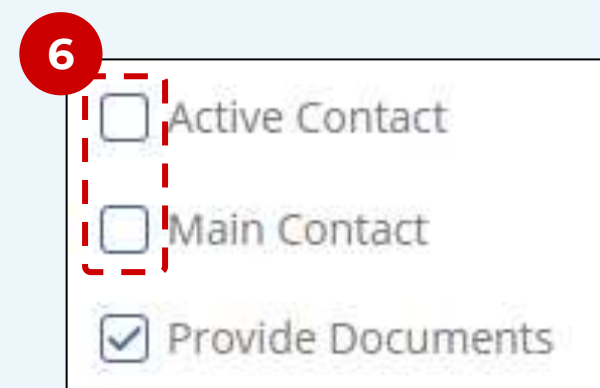
Principal Investigator

Clinical Research Associate

Clinical Research Coordinator

Former Principal Investigator

- 6 Scroll down and remove the checks from **Active Contact** and **Main Contact**.

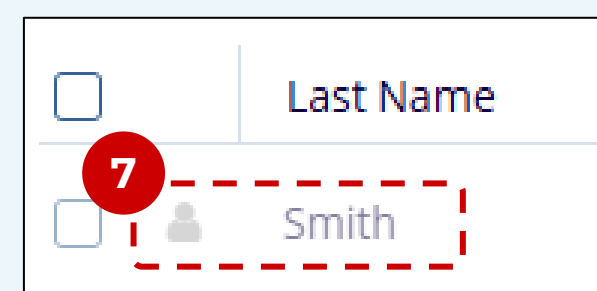


Active Contact

Main Contact

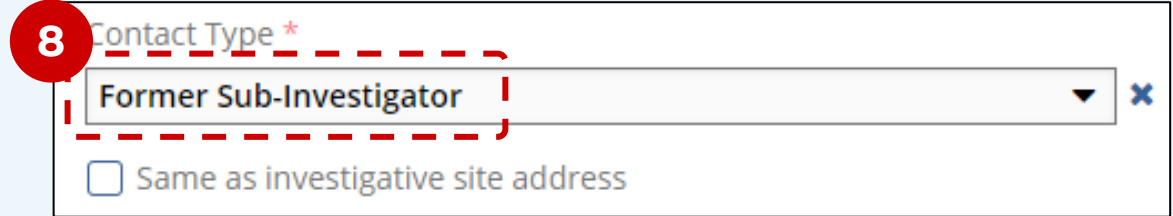
Provide Documents

- 7 A greyed-out entry indicates the contact is inactive. Should the same individual still be attached to the study/site, you will need to create a second contact profile for them.



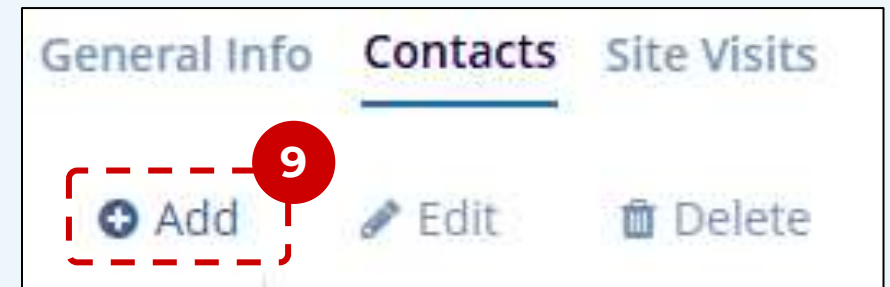
	Last Name
<input type="checkbox"/>	Smith

8 Perform steps **4-6** again, on the profile of the current Sub-Investigator.



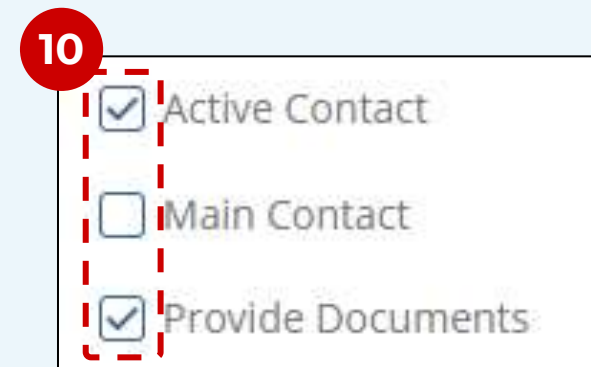
A screenshot of a web form showing a dropdown menu for 'Contact Type *'. The selected option is 'Former Sub-Investigator'. Below the dropdown is a checkbox labeled 'Same as investigative site address' which is currently unchecked. A red dashed box highlights the dropdown menu, and a red circle with the number '8' is positioned to its left.

9 **Add** a new profile for the formerly-sub investigator, having two profiles allows Completeness Views and Reports to maintain the previous document assignments unchanged.



A screenshot of a web interface showing three tabs: 'General Info', 'Contacts', and 'Site Visits'. The 'Contacts' tab is active. Below the tabs are three buttons: 'Add', 'Edit', and 'Delete'. The 'Add' button is highlighted with a red dashed box, and a red circle with the number '9' is positioned to its right.

10 Use the existing bio info (mail, name, etc.) and set the contact as **Principal Investigator**, with **Active Contact** and **Provide Documents checked**. Main Contact is generally assigned to PIs, but this is not mandatory.



A screenshot of a web form showing three checkboxes: 'Active Contact', 'Main Contact', and 'Provide Documents'. The 'Active Contact' and 'Provide Documents' checkboxes are checked, while 'Main Contact' is unchecked. A red dashed box highlights the checkboxes, and a red circle with the number '10' is positioned to its left.