

Updating PI at a Site with a PI who has an End Date but has Returned as the PI

Important: Do not remove the **End Date** from the returning PI's record until the following steps are completed!

1. On the **Site Management** tab, locate the site (do NOT click the Site Contact tab), and then click the selection icon in the **PI Last Name** field.
2. Query for the returning PI's name, and then click **OK**.
3. When the message below displays, click **OK**.



4. Click the Escape (Esc) key.

The returning PI's name will now display in the **PI First Name** and **PI Last Name** fields but will not display on the **Site Contact** view tab until you do the following:

5. Go to the **Site Contact** view tab and change the display from **Active Only** to **All**.

The PI you are *replacing* will have an **End Date**.

6. If needed, change the **End Date** for the PI being replaced, but do not delete the date.

The *returning* PI will also have an **End Date**, and will have the **Start Date** from his *previous* time as PI.

7. Remove the **End Date**, and then do one of the following:

Leave the **Start Date** as the *original* date

OR

Change the **Start Date** to the *new* date

Note: It is recommended that you leave the original **Start Date** and add a note in the **Comments** field to explain the time lapse.