

## PI Designee

- 1) For the study/studies where a staff member will be serving as a PI designee, they should go to the study and assign themselves the staff role (in addition to any pre-existing staff roles they have) of PI Designee. To do this, they can:
  - a. Go to PC Console->Main/Staff
  - b. Click on the Update button at the bottom of the page
  - c. At the top of the page, there should now be a section that looks like this:

**Protocol Staff**

Role	Staff Name	Start Date
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Select PI Designee for the role, their own name for Staff Name. Start date can either be left blank or can have a date that reflects when they began as designee

- d. Click the Add button
- 2) Whenever the study is in need of a PI Signoff, Investigators or their designees can then proceed to eCRFs/Calendars->Specifications for the study in question, and the PI Signoff button should be found in the lower-right hand corner, similar to this screenshot:

The screenshot shows the 'Study Specification' interface for protocol 13TESTEST. It features a sidebar with navigation options like 'Calendar', 'Description / Notes', 'Save As', 'Status History', and 'Specifications'. The main area contains a table with columns for 'Screening', 'Treatment', 'Interval Loading', and 'End of Treatment', each with sub-columns for cycles (e.g., C1D1, C2D1, etc.). Rows include 'Baseline', 'Vital Signs', 'Blood Chemistries', 'Hematology', 'Adverse Events', 'CT/MRI', 'Concomitant medications', 'Drug Administration', 'Toxicity Assessment', and 'Single MRI'. A legend at the bottom explains the symbols: 'C = Billable to Patient/Insurance', 'R = Paid for by Sponsor', and 'NA = Not Billable to Patient/Insurance; Not Paid for by Sponsor'. At the bottom right, there are buttons for 'Switch Version', 'View Excel', 'PDF Forms', 'Add Procedures/Labs', 'Undo Completed', and 'PI Signoff'.

**Note:** All study investigators and designees should be notified via email from OnCore whenever a study has a completed calendar/budget version awaiting PI Signoff.