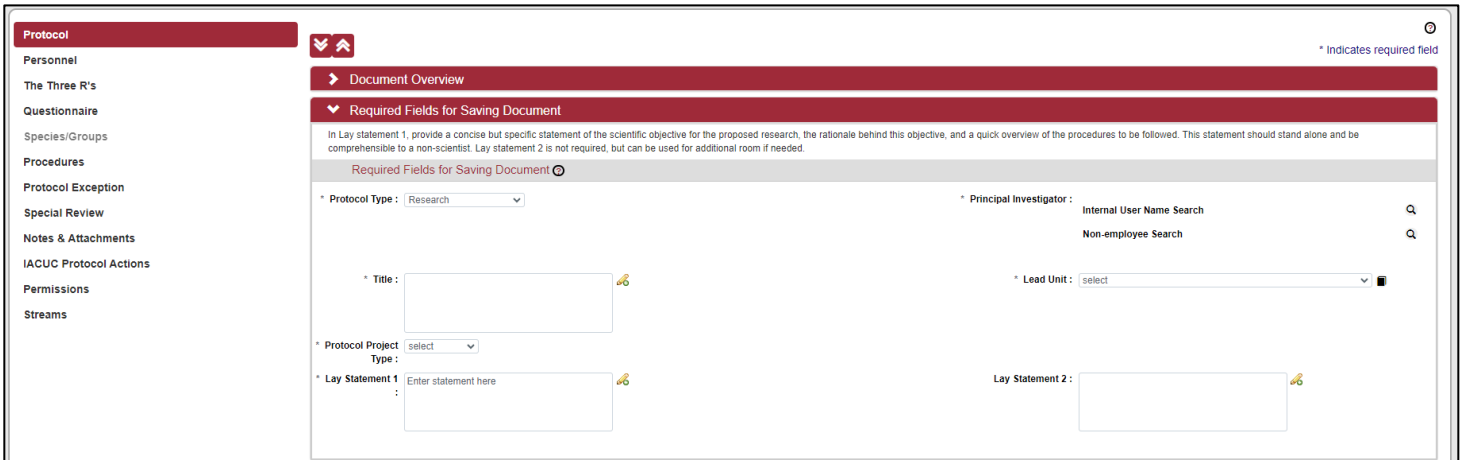# IACUC: UPDATING THE PROTOCOL TAB

When initiating a new protocol, you will be brought to the **Protocol** tab on the new protocol.

1) The **Required Fields for Saving Document** panel will need to be completed before moving on to any other sections or tabs. All fields with an asterisk (*) will need to be filled out before you can save the protocol.
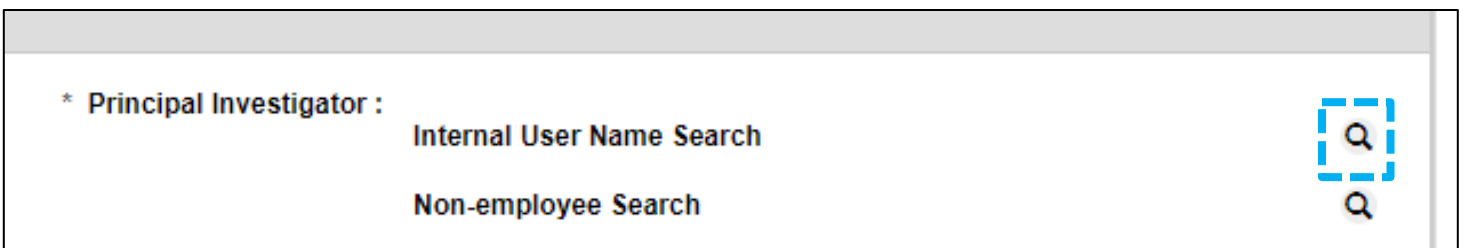

  a. **Protocol Type** – Select the option that best fits the type of protocol you are submitting.

  b. **Title** – Enter the title of the protocol. This can be modified later, so feel free to use a placeholder.

  c. **Protocol Project Type** – Select the option that best fits the project type for your protocol.

  d. **Lay Statement 1** - Provide a concise but specific statement of the scientific objective for the proposed research, the rationale behind this objective, and a quick overview of the procedures to be followed. This statement should stand alone and be comprehensible to a non-scientist.

  e. **Lay Statement 2** – Optional. Use this box for additional space if you reach the character limit in Lay Statement 1.

2) For the **Principal Investigator** field, click the magnifying glass for "Internal User Name Search."

3) On the **Person Lookup** that opens up, enter the full email address for the protocol's Principal Investigator in the **Email Address** field and click on the **Search** button. After the search loads, click the return value link to add the person into the protocol as the Principal Investigator and return to the **Protocol** tab.

4) Back on the **Protocol** tab, the **Lead Unit** field will update to match the unit for the selected Principal Investigator. If needed, you can use the dropdown to modify the lead unit.
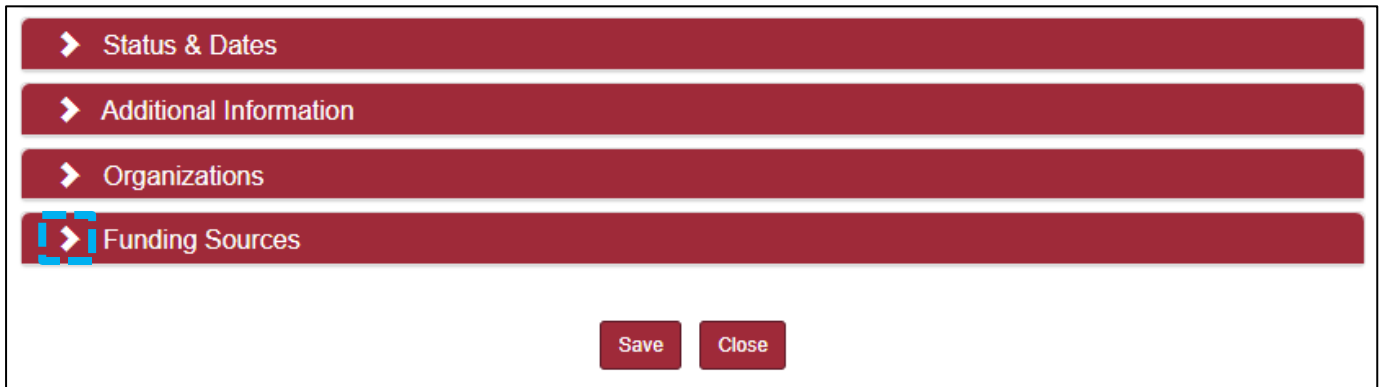

Note: Once the protocol is saved, the Lead Unit is not modifiable. If a change is needed after adding the PI, be sure to update this field before saving the protocol.

5) Once all required fields have been completed, you can save the protocol using the **Save** button at the bottom of the page or clicking on any of the other tabs listed on the left of the page.
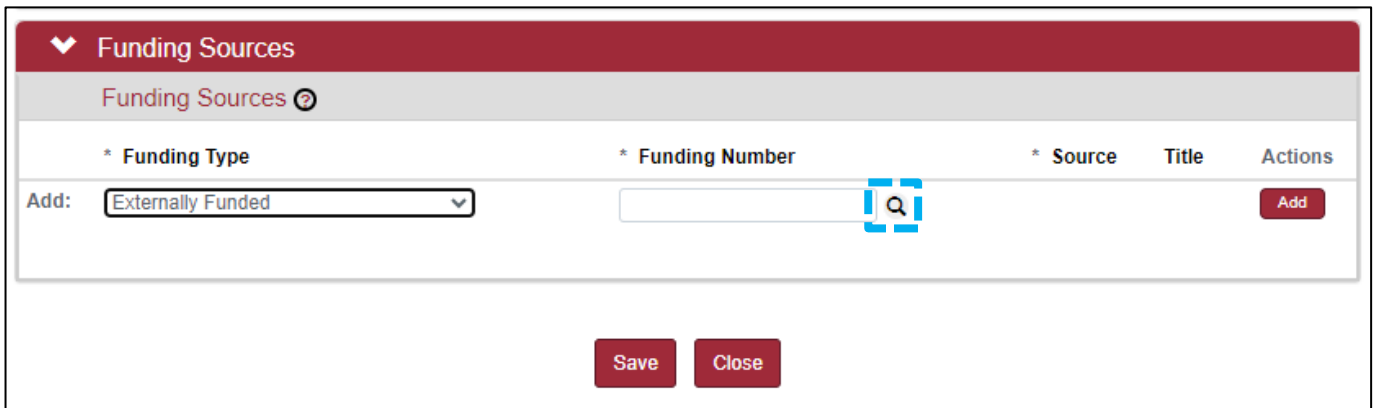
OPTIONAL: ADDING A FUNDING SOURCE

If you have a funding source you would like to link to your protocol, you can add it on the **Protocol** tab under the **Funding Sources** panel.

1) Click the > on the Funding Sources panel to expand it.

2) Select "Externally Funding" from the **Funding Type** dropdown.

3) Click on the magnifying glass icon under the **Funding Number** column.

4) Using the **Institutional Proposal Lookup**, find the proposal you would like to link. The easiest method to search would be to use your name in the **Principal Investigator Full Name** or **All Personnel Full Name** fields while selecting the Contains option link in the image on the next page. Click the **Search** button at the bottom of the page to run the search.

Institutional Proposal Lookup

Institutional Proposal Number:	[ ]	**Sponsor Proposal ID:**	[ ]
Proposal Type:	select ▾ 🔍	**Status:**	▾ 🔍
Temporary CCN:	[ ]	**Unit ID:**	[ ] 🔍
Unit Name:	[ ]	**Principal Investigator Full Name:**	schwartz
All Personnel Full Name:	[ ] 🔍	**Sponsor ID:**	[ ] 🔍
Sponsor Name:	[ ]	**Prime Sponsor ID:**	[ ] 🔍
Prime Sponsor:	[ ] 🔍	**Project Title:**	[ ]

○ Starts With ⦿ Contains ○ Exact

[Search] [Clear] [Cancel]

5) Click the **return value** link next to the proposal you want to link to your protocol from the list of search results to return to the **Protocol** tab.

6) Click the **Add** button to add the link between your protocol and the proposal.

❤ Funding Sources

Funding Sources ☉

* Funding Type	* Funding Number	* Source	Title	Actions
Add: Externally Funded ▾	00000010 🔍		-	[Add]

[Save] [Reload] [Close]