

# Principal Investigator (PI) User Manual

This guide covers the core features available to Principal Investigators.

## Your Role

- Create and manage studies
- Prepare and submit submissions (initial, amendments, continuing review, reportable events)
- Respond to IRB requests and view determinations/letters

## Access & Permissions

- Regular user account associated to studies via Study and StudyPersonnel
- Access limited to your own studies and submissions

## Dashboard

- Single-column layout with:
  - Your Studies table (Actions: Submissions, New Submission, Study Documents)
  - Recent Submissions listing

## Communications (Threads)

- From the PI Dashboard:
  - In Your Studies → Actions: use "Threads" and "New Thread" to see or create study-linked threads.
  - In Recent Submissions → Comms column: "Threads" and "New" for submission-linked threads.
- Thread pages include a role-aware back button (returns to PI Dashboard for PI accounts).
- Attachments are validated (extension/MIME) and antivirus-scanned before saving.

## Audit

- Staff/chair/admin can view the Audit UI. PIs typically do not see the Audit menu.

## Daily Tasks

### 1) Create and Manage Studies

- Create a new Study (via Studies UI or contact IRB staff if restricted)
- Add Study Personnel (Co-I, coordinators) so your team can collaborate

## 2) Create a Submission

- Provide Title and Type only (simplified form).
- After save you are redirected to "Manage attachments" for that submission.
  - Upload multiple files one-by-one with description.
  - Files are validated (type/size/MIME) and AV-scanned, then archived.

## 3) Review Cycle

- If reviewers request clarifications or modifications, update and re-submit
- View Determination and Decision Letter once issued

## 4) Meetings & Minutes

- Decisions may be discussed in IRB meetings; you can view read-only minutes when published

## Tips

- Keep study team membership current to ensure access and notifications
- Use the Documents
- Study Documents: use the Study Documents action from your study or submissions list header to see all documents across the study.
- Submission Documents: each submission has a Documents page listing files and versions.
- Clicking a file name opens the in-app PDF viewer (for PDFs). Non-PDFs show a fallback with a Download button.