

How-To Series: Creating Personnel Amendments to Protocols		
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File a personnel amendment to protocols when staff changes occur, such as adding a new lab member or removing existing members who have left. There are multiple steps that need to be performed to complete personnel amendments. Personnel need to be added or removed from the main lab library and then an amendment needs to be filed and submitted for each individual study requiring updates.

Refer new staff to the training page under the Getting Started tab of the IACUC website (<https://iacuc.northwestern.edu/>) when they have an active NetID. Ensure that both Steps 2 & 3 are completed; Researcher Profiles are created during Step 3 and become searchable within eIACUC after they have received OHS clearance.

1. Adding Personnel to the Lab Library
 - a. Click “Edit Lab Members” link on the top left and a pop-up will appear.
 - b. Click the "+Add" button
 - c. Search for the name of the personnel you wish to add to the lab library, click on it, and then click the "OK" button at the bottom of the slide out. You may click the "OK and Add Another" button if you have multiple Researcher Profiles to add.
 - d. Scroll down to the bottom of the pop-up and click the "Ok" button to save the personnel profile additions to the lab library.
2. Removing Personnel from the Lab Library
 - a. Click “Edit Lab Members” link on the top left and a pop-up will appear.
 - b. Scroll until you find the name of the personnel to be removed and click on the small round blue “X” button in the top line to the right of their name.
 - c. Scroll down to the bottom of the pop-up and click the "Ok" button to save the personnel profile removals from the lab library.
3. Opening Amendments
 - a. Click on the "Protocols" tab and click on the title of the approved protocol that requires personnel updates.
 - b. You may right click on the protocol titles and open them in new tabs if you have multiple that you need to update.
 - c. Once you are on the homepage of a protocol, click the "Create Amendment" button on the lefthand side of the screen.
 - i. If you don't see this button, it is for 1 of 2 reasons:
 1. There is currently another amendment open for this study.
 2. You are not a PI Proxy on this study and do not have authority to open amendments to it.
 - d. Select "Personnel Change" in section 1.0.
 - e. Type the name/s of the personnel that are being added or removed in Box 2.0.
 - f. Click the "Continue" button on the bottom right.
 1. Click the “Exit” or "Finish" button to complete opening the amendment.

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2. Click on the "Edit Modified Study" button on the lefthand side.
 - g. Key Protocol Areas to Check while Editing the Modified Study:
 - i. Study Identification
 1. Emergency Contacts
 2. Contact Person
 - ii. Define Procedure Personnel
 1. Click the "Update" button next to each procedure where personnel need to be added or removed.
 2. Check or uncheck the names that appear to make the updates.
 3. Click the "Ok" button to confirm the updates.
 4. Click the "Save" or "Continue" button to save the changes.
 - iii. Study Personnel
 1. PI Proxies at the bottom of 1.0
 2. Click the "save" button if changes have been made.
 3. Click "Exit" to return to the amendment's homepage.
4. Submitting Amendments
 - a. Click "Submit" on the lefthand side of the screen under "My Activities."