MU Office of Sponsored
Programs Administration
University of Missouri

Change in Personnel Form Instructions
FOR INTERNAL USE ONLY
Change in Personnel Form

Definitions

- Key Personnel is a Person
    - Specified in the application or award document, a change will likely require Prior Approval from the Sponsor
    - Or whose involvement on the project needs to be linked to the award internally in PeopleSoft; may not require Sponsor Approval
- Project Manager is
    - PeopleSoft field that drives who approves project transactions such as expense reports, vouchers, requisitions, etc.
    - The person who the PI has delegated to make decisions regarding the project work, must have first hand knowledge
    - There can be only one Project Manager; contact Post Award Team to discuss alternatives if more than one is needed
    - Requires a Delegation of Authority Form to be held on file in the Department
- Reporting Role is
    - PeopleSoft fields that designate a person with a high level of participation within a project
    - This person does not necessarily have authority to make decisions on the project
    - The Reporting Role fields drive information included on the Grants Report 2: Awards by Investigator, myVita, Research Productivity Dashboards, and the Faculty Insights Tool
    - Possible Roles to Assign: Principal Investigator, Co-Principal Investigator, Co-Investigator, or Key Personnel
- Shared Credit - Drives the allocation of grant data across a variety of situations, including but not limited to: RIF, Research Productivity, Dashboards, General Expenditure Reports, Resource Allocation Model Data, etc.

Compliance Considerations

If initiating a PI or Key Personnel Change, notify the relevant compliance offices if the project involves any of the following:

- IRB - Human subjects
- ACQA - Vertebrate Animals
- EHS - rDNA, BioHarzardous Materials, Recombinant DNA, Radioactive Materials
- FCOI - Sponsored by an Agency that requires COI Review

Requirements for Each Type of Change

I. PI or Key Personnel Change Requiring Sponsor Approval
   - Information Needed on Form (for each individual listed)
       - Current/Outgoing PI Name, Employee ID, Action
       - New PI Name, Employee ID, Action
       - Explanation: needs to be elaborate and specific; will be submitted to sponsor
   - Curriculum Vitae and/or Current and Pending Report for the new PI
   - Other information may be required by the Sponsor, consult with Post Award Team as needed
   - Signatures:
       - Current/Outgoing PI
       - New PI
       - If Change is within same Department: Dean & Chair of Current Department (if both exist)
       - If Change is between different Departments/Colleges: Dean(s) & Chairs for BOTH Current and New (if both exist)

II. Shared Credit
   - Information Needed on Form (for each individual listed)
       - Name, Empl ID, Dept ID, New Shared Credit %, Action
       - Shared Credit must total 100%, including individuals not listed on form (i.e. not being changed)
   - Signatures
       - Current PI
       - All individuals whose shared credit is impacted (i.e. listed on form).
       - If change is within same DeptID - Dean & Chair of Current Department (if both exist)
       - If change is between different DeptIDs - Dean(s) & Chairs for BOTH Current and New DeptIDs (if both exist)

III. Project Manager
   - Information Needed on Form (for each individual listed)
       - Name, Employee ID, Action
   - Confirmation Delegation of Authority Form is on file for new Project Manager (provide when submitting form to OSPA)
   - Signatures
       - Current PI
       - Individual being added to project

IV. Reporting Role
   - Information Needed on Form (for each individual listed)
       - Name, Employee ID, Reporting Role, Action
   - Signatures
       - Current PI
       - Individual being added to project

Submission Instructions

Email completed form and any additional supporting documentation to your Post-Award Team.