How to edit a research team

Table of Contents

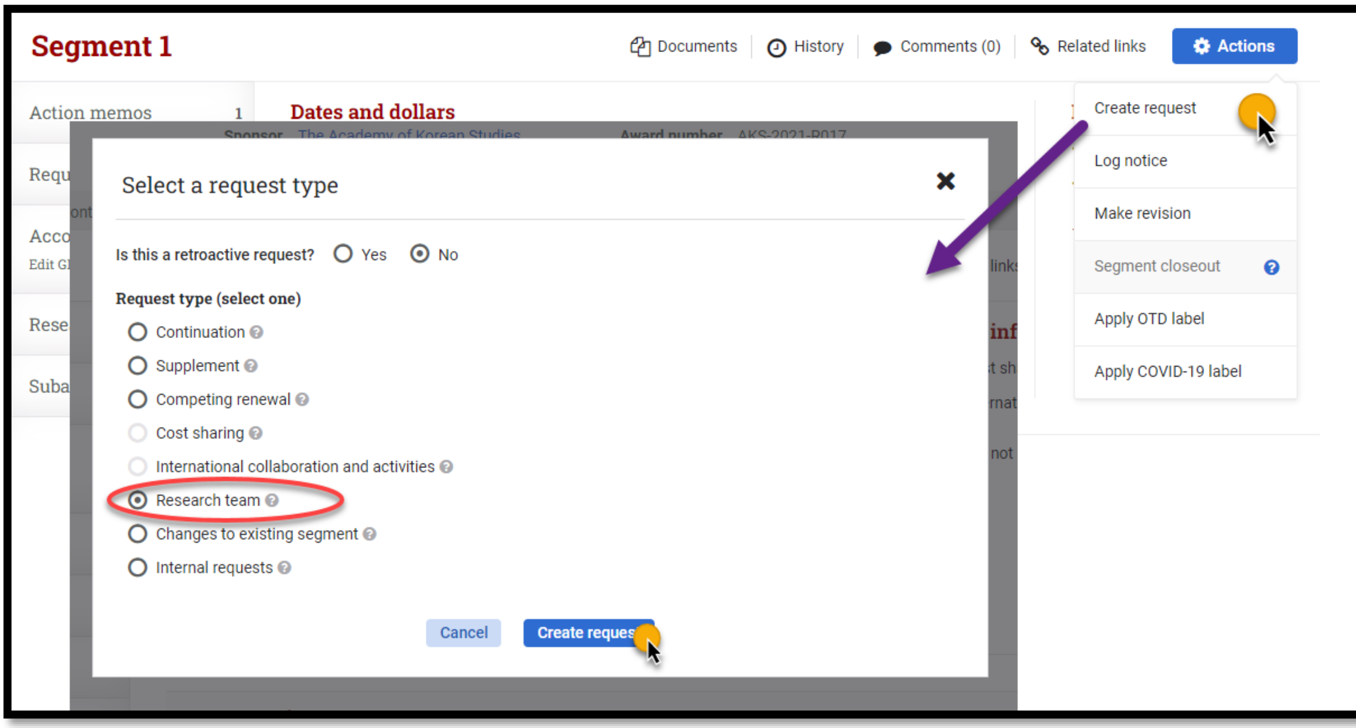
Overview:

This job aid focuses on creating and completing a GMAS Edit research team request when updates to the segment research team are required.

How to create an edit research team request

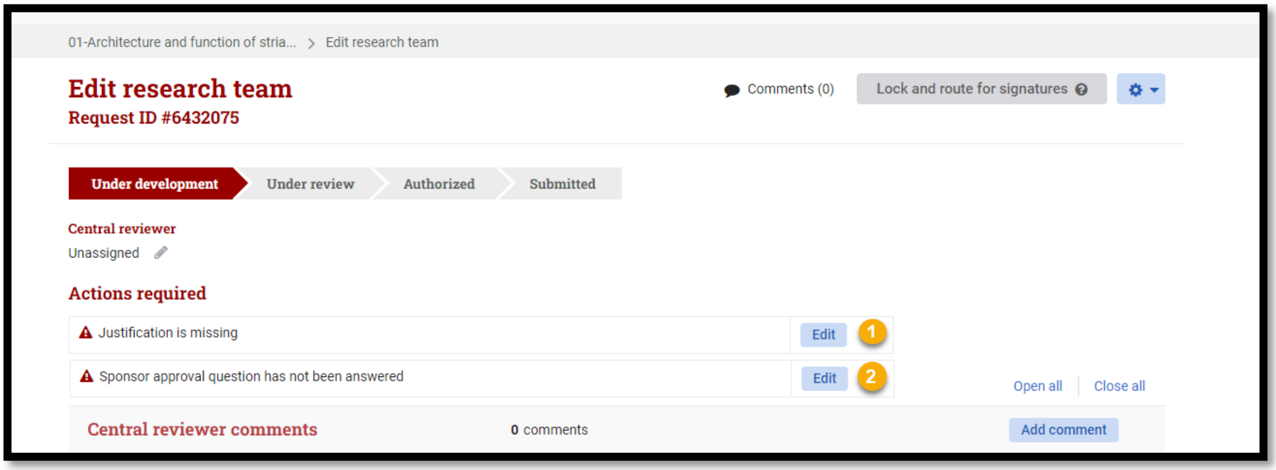
The Edit research team request may be initiated when a Department Administrator proactively identifies the need to make changes to the segment research team. As with any request, the Department Administrator will go to the segment homepage and select “Create request” then select “Research team” from the list of request types.

- The edit research team request can also be created from the segment research team screen by selecting “Create a request to edit research team”



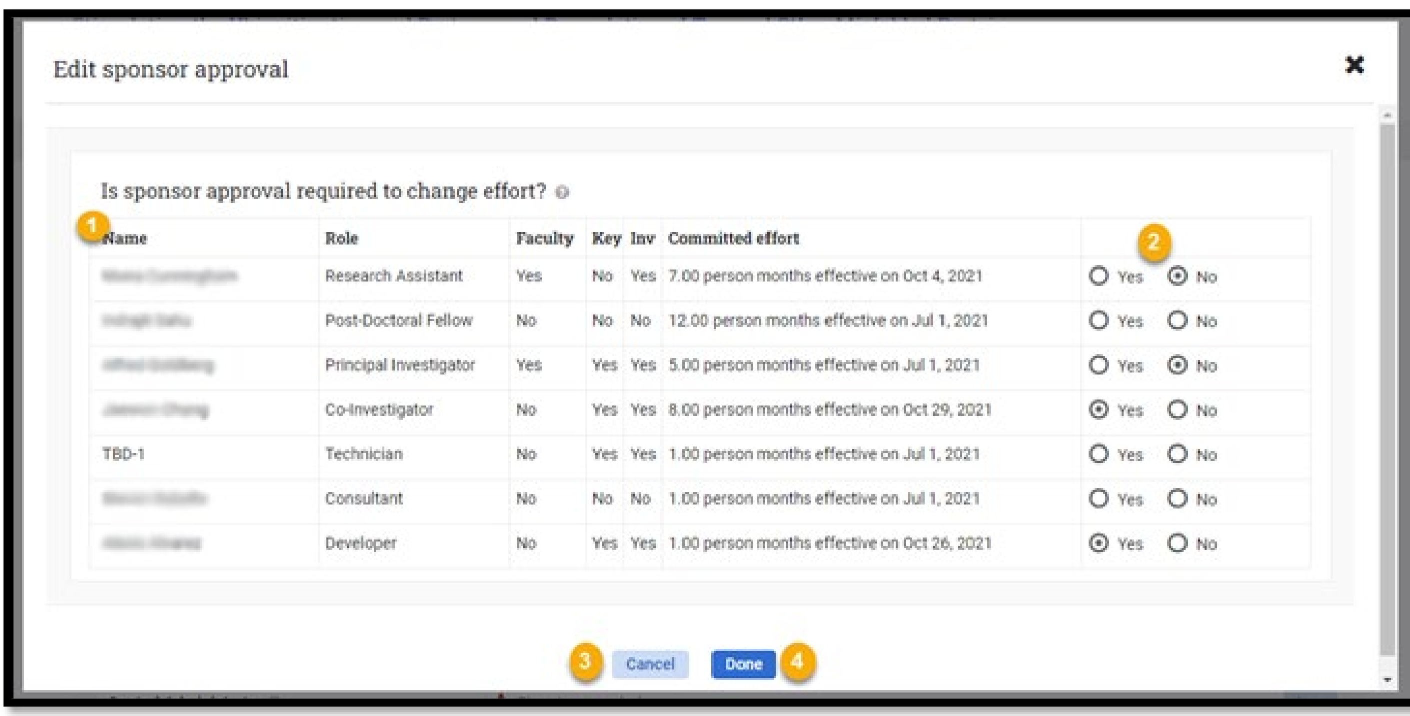
Required actions:

Upon selecting the Edit research team request type, the request homepage is displayed, and the “Actions required” will appear at the top of the screen. All required actions must be completed to enable the action button.



1. Justification is Missing – Select Edit, and a pop-up text box is displayed. Provide details about why the research team requires updates (ex: editing, adding, or deleting research members).

2. Select “Edit” and a modal will open that will allow you the ability to answer which research members require sponsor approval to change committed effort.



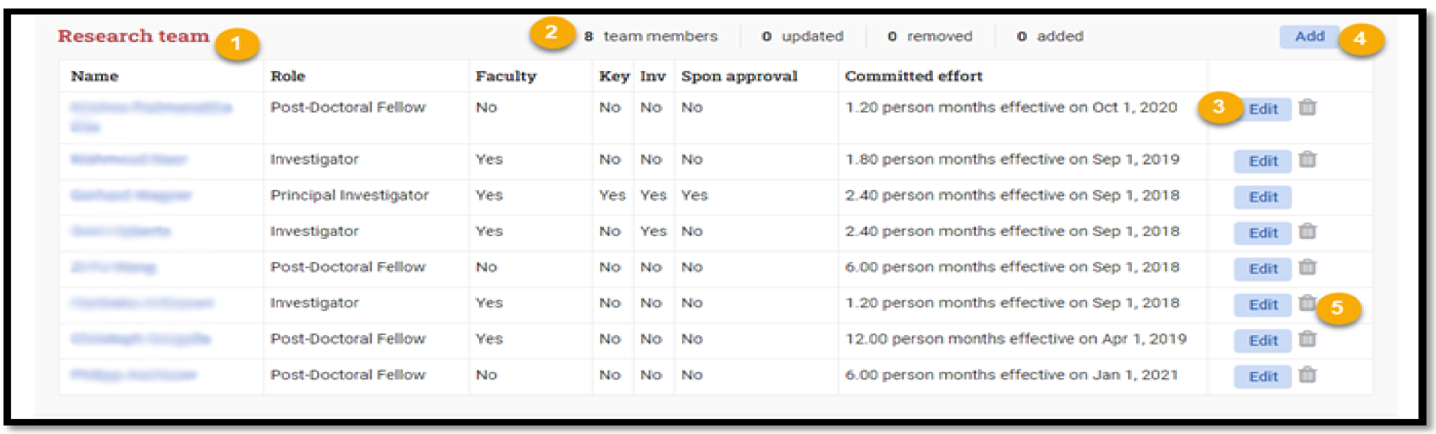
Sponsor approval modal

1. The sponsor approval modal displays information of all research team members on the research team.
2. Select “Yes” or “No” in response to whether a research team member requires sponsor approval to change committed effort.
3. Select “Cancel” to close and delete any changes made in the modal.
4. Select “Done” to close and save any changes made in the modal.

Back to top

Research team panel

The following instructions describe steps for making updates to the research team.
Note: Changes made on the request will not update the segment research team until the request has been awarded.



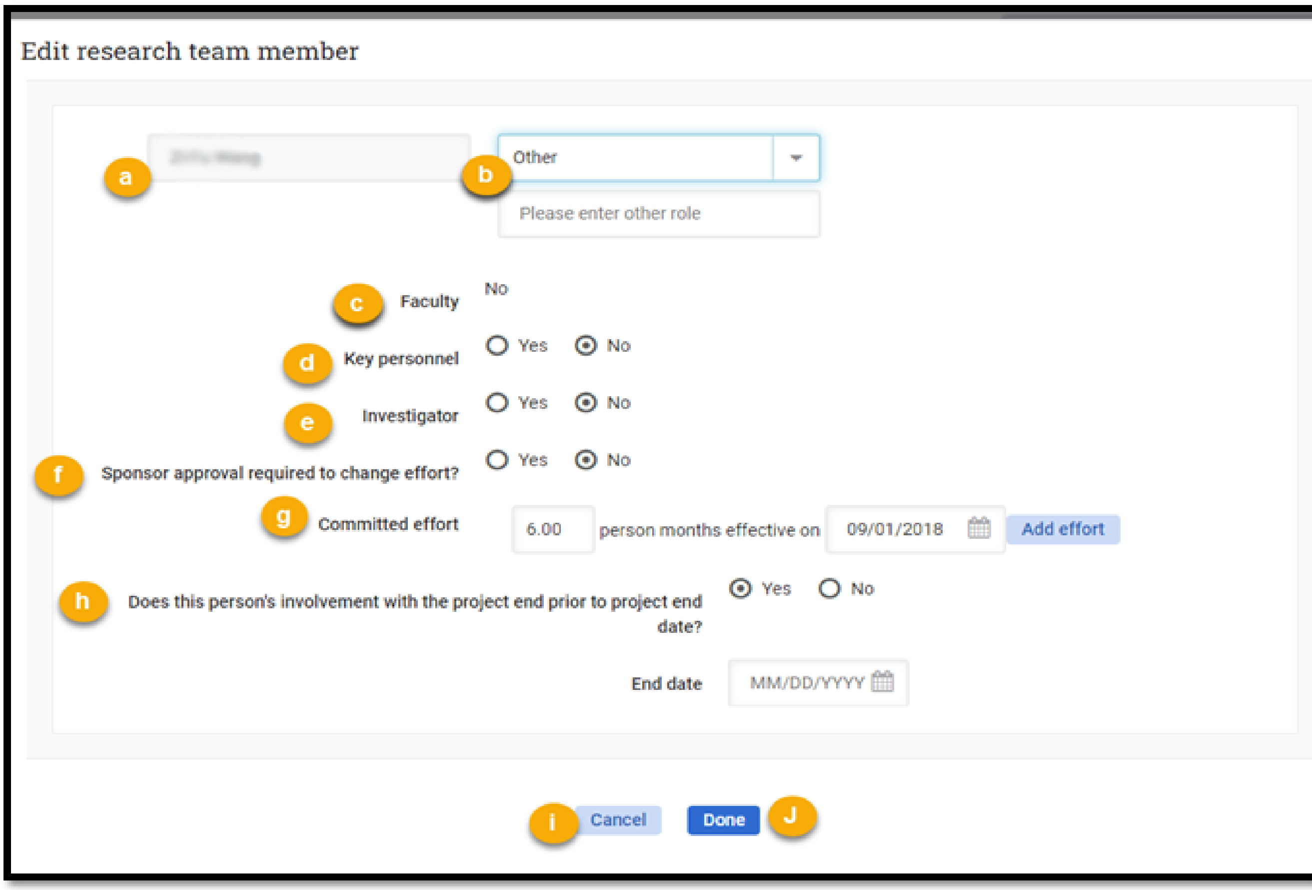
Name	Role	Faculty	Key	Inv	Spon approval	Committed effort	
	Post-Doctoral Fellow	No	No	No	No	1.20 person months effective on Oct 1, 2020	Edit
	Investigator	Yes	No	No	No	1.80 person months effective on Sep 1, 2019	Edit
	Principal Investigator	Yes	Yes	Yes	Yes	2.40 person months effective on Sep 1, 2018	Edit
	Investigator	Yes	No	Yes	No	2.40 person months effective on Sep 1, 2018	Edit
	Post-Doctoral Fellow	No	No	No	No	6.00 person months effective on Sep 1, 2018	Edit
	Investigator	Yes	No	No	No	1.20 person months effective on Sep 1, 2018	Edit
	Post-Doctoral Fellow	Yes	No	No	No	12.00 person months effective on Apr 1, 2019	Edit
	Post-Doctoral Fellow	No	No	No	No	6.00 person months effective on Jan 1, 2021	Edit

1. The research panel will display a list of team members defaulted in from the Initial or Competing Renewal Proposal.
2. The counts in the panel heading will display the:
   - Total – displays the total number of members on the research team.
   - Updated – displays the number of members that have been edited.
   - Added – displays the number of research members that been added to the research team.
   - Removed – displays the number of research members that have been removed from the research team.

Back to top

Edit research team members

3. To make edits to the existing research team member select “Edit”. Selecting “Edit” will open-up a modal with information related to that particular research team member.



a. Displays the research member’s name in the edit modal, this field is disabled unless the research member is TBD.
    - Note that TBD members on a research team can be changed to a person by unchecking the “Team member is TBD” checkbox.
b. Displays the current role associated to the research team member.
    - When editing this field, a drop down will appear with a list of all roles that are research team roles, except for PI and Mentor.
    - If editing the PI or Mentor, this field displays as text only.
    - If "Other" is selected, an additional text box appears to enter the name of the role.
c. Displays whether the research member is a faculty member. This is a pre-determined field and is not editable.

- Faculty is defined as individuals that are active Harvard employees with an employment classification of ‘Faculty’, ‘Junior faculty’, or ‘Other’.

d. Displays the response whether the research member is considered key personnel
   - The response is editable and can be changed to “Yes” or “No”.
   - This field is set to “Yes” and disabled for the PI.

e. Displays the response of whether this research member is considered an investigator.
   - The response is editable and can be changed to “Yes” or “No”.
   - This field cannot be edited and will always be answered as “Yes” for the PI.
   - Note: Changing a prepopulated research team member’s investigator flag will have an impact to OAIR approvals (switching to “Yes” may generate OAIR approvals, switching to “No” may withdraw existing OAIR approvals).

f. Displays the response which identifies whether an individual requires sponsor approval to change their committed effort.
   - The response is editable and can be changed to “Yes” or “No”.

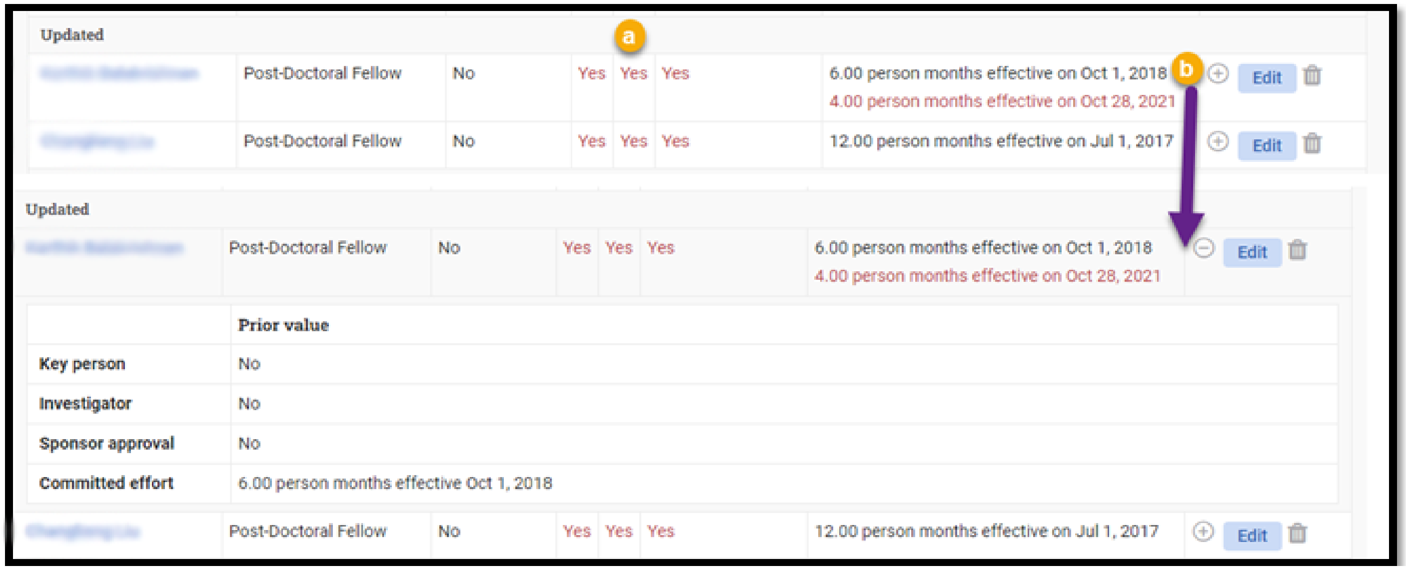
g. Displays the committed effort associated to the research member.
   - The committed effort is editable.
   - Selecting the date picker allows you to add the effective date of the commitment.
   - Selecting “Add effort” will generate a new row where you can add additional committed effort.

h. Displays the response of whether this research member’s involvement ends prior to the project’s end date.
   - The response is editable and can be changed to “Yes” or “No”
   - Selecting “Yes” opens-up a date picker to assign the date that this member’s involvement ends.
   - Selecting “No” assumes the research member will be involved until the project’s end date.
   - This field defaults to ”No” and is disabled for the PI.

i. Select “Cancel” to close and delete any changes made in the modal.

j. Select “Done” to close and save any changes made in the modal.

Any changes to an existing research team member will now move that member to the “Updated” section within the panel.

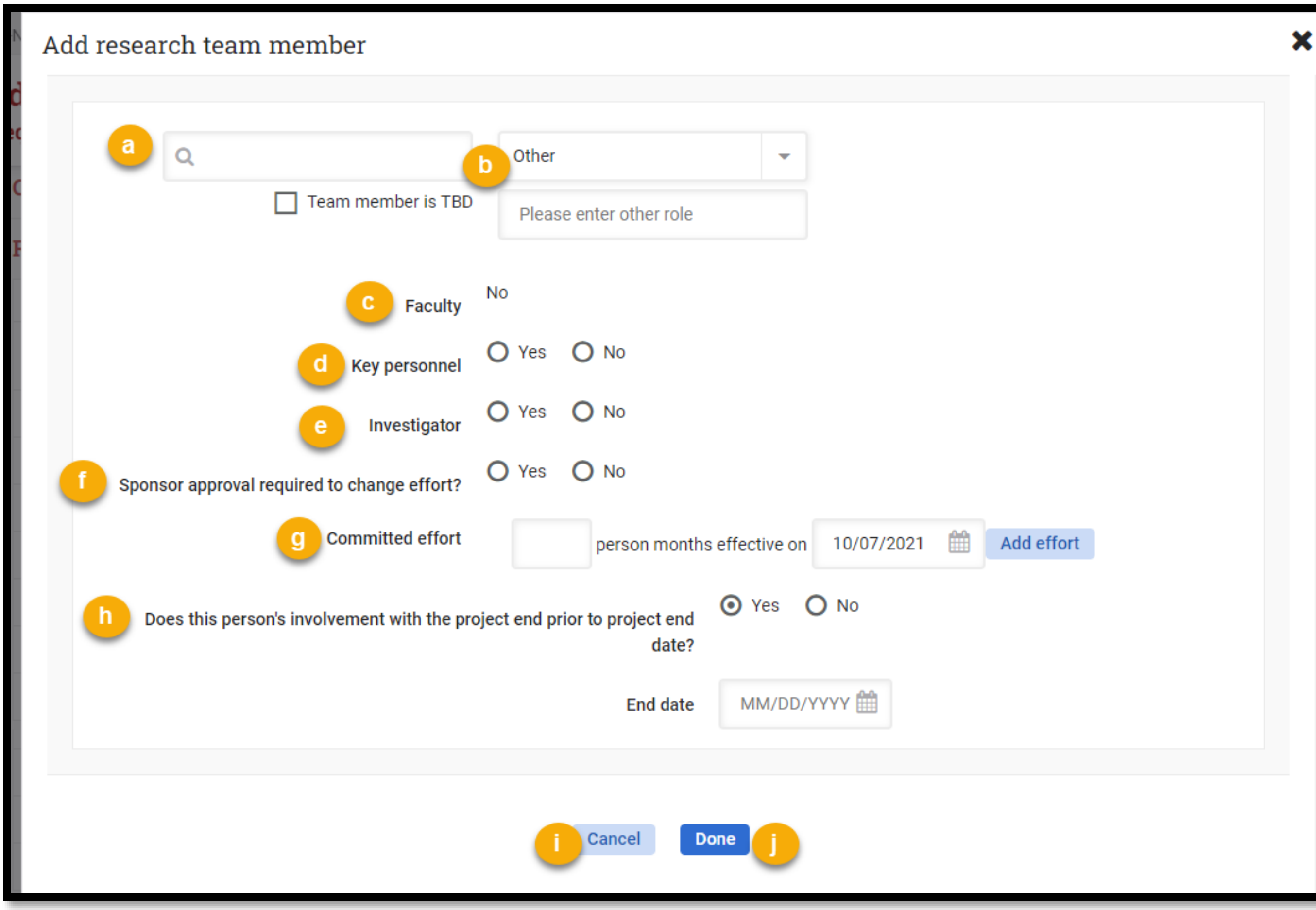


a. The updated section will display the new changes made to the research team members in red text.
b. Selecting this drop down will expand the row of an edited research member and display the prior value section. The prior value section will provide the original responses or values of the fields that were edited (highlighted in red) to compare/view what was updated

[Back to top](#)

Add research team members

4. To add a new member to the research team select “Add”. Selecting “Add” will open-up a modal which contains no data.



a. Displays a person look-up to add a new research member.
   - The person look-up can be used to identify the new research team member.
     i. If the person is not determined, instead of performing a person look-up, select the “Team member is TBD” checkbox.
     ii. TBD profiles can be changed to a specified individual by unchecking the “Team member is TBD” box in the edit modal at a later time once they are identified.
     iii. If “Team member is TBD” box is checked a TBD placeholder will fill in the person name.
   - A research team member cannot be added to the research team multiple times/in multiple roles.

b. Displays a drop down that lists all of the roles that are research team roles, except for PI and Mentor.
   - If "Other" is selected, an additional text box appears to enter the name of the role.

c. Displays whether the research member is a faculty member. This is a pre-determined field and is not editable.
   - Faculty is defined as individuals that are active Harvard employees with an employment classification of 'Faculty', 'Junior faculty', or 'Other'.

d. Displays the question asking whether the research member is considered key personnel.
   - The response is editable and can be "Yes" or "No".

e. Displays the question asking whether this research member is considered an investigator
   - The response is editable and can be "Yes" or "No".
   - Note: Adding a new segment research team member and marking their investigator flag as "Yes" will generate OAIR approvals.

f. Displays the question which identifies whether an individual requires sponsor approval to change their effort.
   - The response is editable and can be "Yes" or "No".

g. Displays the committed effort field, the committed effort entered here will be associated to the research member.
   - The committed effort field is editable.
   - Selecting the date picker allows you to add the effective date of the commitment.
   - Selecting "Add effort" will generate a new row where additional committed effort can be added.

h. Displays the question of whether this research member's involvement ends prior to the project's end date.
   - The response is editable and can be "Yes" or "No".
   - Selecting "Yes" opens-up a date picker to assign the date that this member's involvement ends.
   - Selecting "No" assumes the research member will be involved until the project's end date.

i. Select "Cancel" to close and delete any changes made in the modal.

j. Select "Done" to close and save any changes made in the modal.

Any research team members that were added in this request will now appear in the "Added" section within the panel.

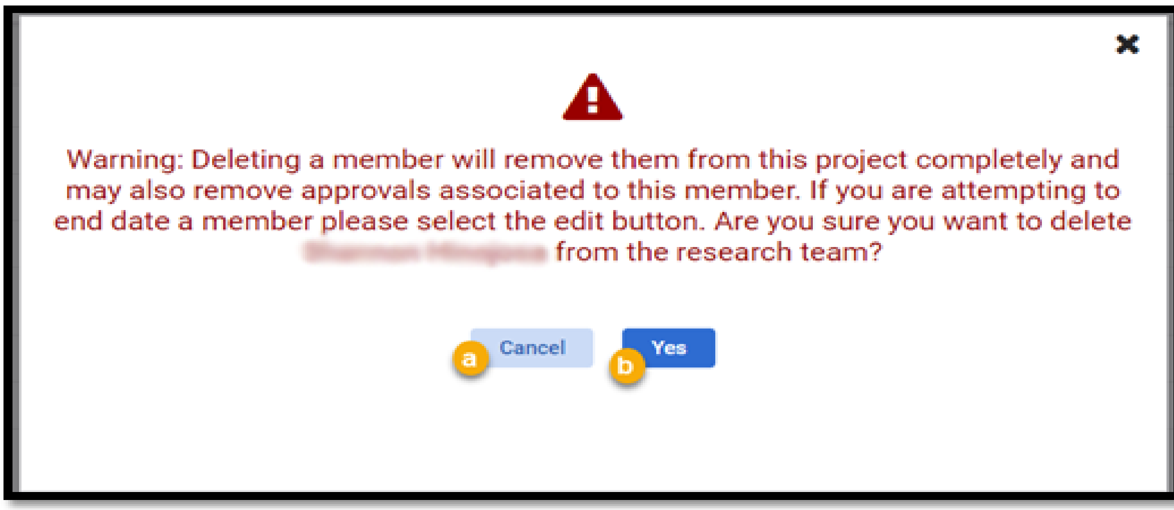
Added

[illegible]	Research Assistant	Yes	No	Yes	No	7.00 person months effective on Oct 4, 2021	Edit
[illegible]	Developer	No	Yes	Yes	Yes	1.00 person months effective on Oct 4, 2021 1.00 person months effective on Oct 26, 2021	Edit

[Back to top](#)

Deleting research team members

5. To delete a research team member, select the trashcan icon. Selecting the trashcan icon will open a warning message confirming that the removal is appropriate.
   - Note: Deleting will remove the research member from this project completely and may also remove approvals associated to this member.
   - Deleting research team members who prepopulated from the original proposal research team will not remove the research team record or related person approvals from the originating proposal, but will remove them from the segment research team once the Edit research team is finalized/awarded.



a. Select "Cancel" to close warning message and keep research member on the team.
b. Select "Yes" to close and permanently remove the research member from the team.

Any research team members that were deleted in this request will now appear in the "Removed" section within the panel.

Removed							
[illegible] Non-HUID	Lab Assistant	No	No	Yes		1.00 person months effective on Jul 1, 2021	
[illegible]	Statistician	No	Yes	Yes		1.00 person months effective on Jul 1, 2021	

Back to top

Additional people with payroll costing

Individuals listed in the 'Additional people with payroll costing for this segment' section of the segment research team screen can also be added to the segment research team by clicking the button next to the individual. Their correct person profile will default in the name field of the pop-up. For instruction on how to add research members please go to the Research team panel section.

Back to top

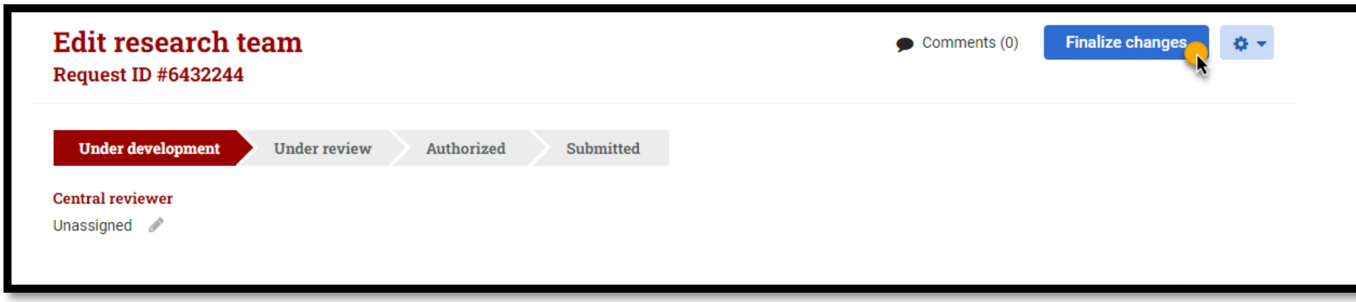
Edit research team document repository

For detailed instructions around the document repository please access the job aid below.
https://gmas.fss.harvard.edu/document-repositories

Finalizing changes

If the edits made on a Edit research team request were **not** made to a faculty member or to a member that requires sponsor approval to change effort, the main action will be "Finalize changes" instead of "Lock and route for signatures" (see "Lock and route for signature" section below) . The "Finalize changes" button should be selected by the individual who is completing the request (mainly department administrators).

- Selecting "Finalize changes" will update the segment research team to reflect all the changes made in the Edit research team request and will change the request status to "Awarded"



Back to top

Lock and route for signature

If changes were made to research team members that are faculty and/or those that require sponsor approval to change effort, the action button available will be "Lock and route for signatures" instead of "Finalize changes" because the request requires central review.

Once the request has been locked and routed, the central office representative will roll the request back for changes if needed, award the request internally if the changes made do not require sponsor approval, or submit the request to the sponsor if they need to approve the changes.

Back to top

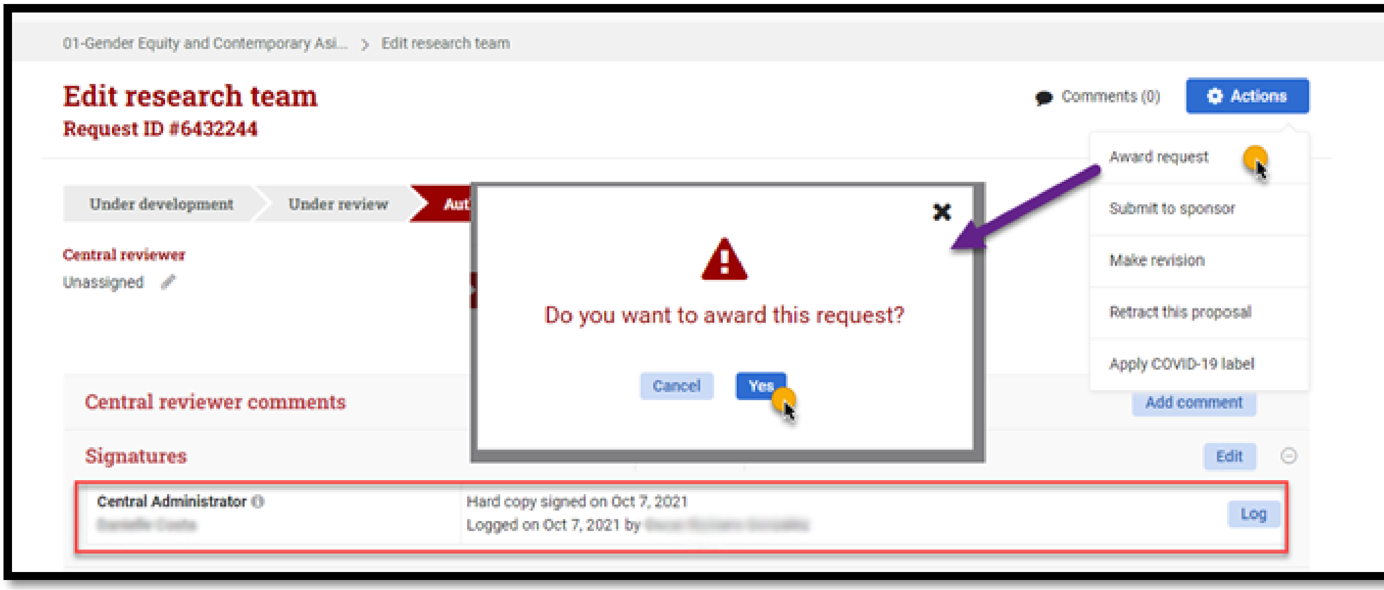
Signature on edit research team request

- When the request is Locked & Routed, the Edit research team request status will switch to "Under Review".
- Once all signatures have been obtained on the request, the request status updates to "Authorized".
- Please note:
  - Before signing ensure that all request components and uploaded documents are accurate. Signing indicates that you approve of the data that has been entered and/or that relevant documents are ready for submission to the sponsor.
  - If an Edit research team request is retracted in order to make edits, any signatures captured will be erased without notification. All required signatures will need to be re-recorded once corrected.

Back to top

Awarding the request/Submitting the request to sponsor

After the request has been locked and routed for signatures and all required signatures have been collected, the Edit research team request status will be "Authorized". If the edits made on the Edit research team request do not require sponsor approval, the central administrator can award this request by selecting "Award request" in the action button menu.



- Confirm all signatures are logged or signed.
- Select the action button and select "Award request"
- Selecting "Yes" on confirmation pop-up will:
  - Award the request.
  - Update the segment research team to reflect all the changes made in the Edit research team request.
  - Send out a notification to the department administrator that the request has been awarded.

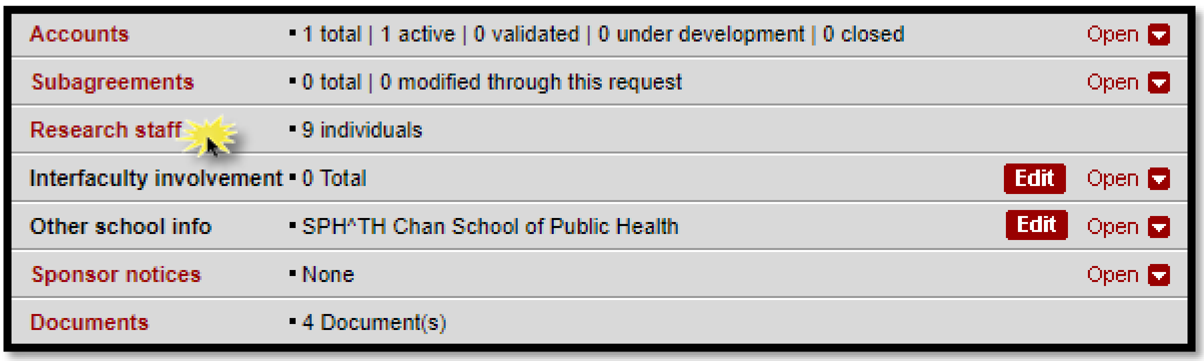
If the edits made on the Edit research team request require sponsor approval, the central administrator can submit the request by selecting "Submit to sponsor" in the action button menu. Additional requests to edit the research team cannot be made until the Edit research team request then moves to an awarded status.

Back to top

Continuation/Supplement requests

To make changes to a research team on a continuation or supplement you will need to select the "Research staff" panel from the request home. This will navigate you over to the request research team screen, this screen will display the research team panel. For instruction on how to make edit/add/delete research members please go to the Research team panel section.

- Please note that changes made to the research team via a Continuation/Supplement will not be applied until the request has been awarded.



Back to top

Segment revision

If the edits made on the research team require approval from the sponsor to update the segment research team, once approval is received the notice will need to be logged against the request and a revision will need to be committed. Once the revision has been committed and the request has been awarded, the segment research team will be updated to reflect the edits made on the request's research team.

Back to top