**Overview:**

Describes how to update unit details for an investigator or key person.

**Note:** Principal Investigator must be a CSU Employee located in the Person Table, or a Non-Employee, in the Address Book.

**Procedure:**

The **Key Personnel** panel contains the **Personnel** subpanel where the Principal Investigator, Co-Investigators, and Key Personnel are specified. Sometimes it is necessary to update the unit details that automatically pull in when the investigator or key persons are added.

**To Update a Principal Investigator (PI) to your proposal:**

1. Click the **Key Personnel → Personnel** subpanel on the **Navigation** panel.

   **Key Personnel** screen will open. While in the **Key Personnel** screen, click the arrow to expand the person details.

   ![Figure 1 Expand Details](image1)

2. Click on one of the tabs (Details, Organization, Extended Details, Degrees, Unit Details, Person Training Details) additional information about that person.

   ![Figure 2 Unit Details](image2)

3. To modify the **Unit Information** (e.g. if the proposal should route to additional units for approval), click the **Unit Details** tab.
4. If the proposal should route to additional units for approval, click the **Lookup/Add Multiple Lines** link and search for and return the Unit(s) you want to add.

![Figure 3 – Adding Unit(s)](image)

5. Alternatively, if a Unit is listed that should not be included in the routing for approval, click the **Delete** button in the **Actions** column for the Unit to remove.

6. Click the **Save** button.

>Note: Adjustments made to the default Person information in these tabs is **only valid** for this proposal; these changes are not saved to CSU’s Person’s Institutional records.