

Selection the 'People' section

PROCES

The screenshot shows a software interface. On the left is a sidebar menu titled "Jump to..." with several items: "General Information" (checked), "General Questionnai..." (checked), "People" (checked, highlighted with a red arrow), "General details", "Study description", "Study sites" (checked), "Funding" (checked), and "Conflict of interest". The main content area on the right shows "Version: 1 (In Pr)" and "Submission Type: New". Below this, there is a section titled "General Informat" and "Only the Principal I" and "Principal Investigat".

You then click on '+ Add Line'

The screenshot shows a table titled "People" with the following text: "University of Waterloo research team", "Ensure you update the PI record by clicking the edit icon.", and "Please 'Add line' for each research member". Below the text are two buttons: "Columns" and "+ Add Line", with a red arrow pointing to the "+ Add Line" button. Below the buttons is a table header with the following columns: "PERSON", "WATERLOO DEPARTMENT", "RESEARCHER ROLE", "PERMISSIONS", and "HAS THIS PERSON COMPLETED THE CORE (TCPS2) TUTORIAL?".

Which opens up the 'Add' information box. You complete the information but remember you need to scroll to the bottom of the box to provide the answers to the questions.

The image shows a modal window titled "Add" with a close button in the top right corner. The window contains several sections for data entry:

- Person:** A text input field with a placeholder text: "If your search doesn't find a person (e.g., undergrad), ask them to simply login to the system as this will add their name so you can now find them in the search. Alternatively, send a request to [Research Ethics](#) to add them to the system."
- Waterloo Department:** A dropdown menu.
- Email Address:** A text input field.
- Phone:** A text input field.
- Researcher Role:** A section with a "+ Add" button.
- Permissions:** A section with the instruction "Be sure to select the permissions you wish to give this person. The PI/Faculty Supervisor must always be granted Full Access." and two checkboxes: "Full Access" and "Read-Only".

At the bottom of the form area, there is a dark grey button labeled "Scroll for more" with a downward arrow. A red arrow points to this button from below. At the bottom of the modal, there are two buttons: "Cancel" (with a yellow 'X' icon) on the left and "Done" (with a checkmark icon) on the right.

Permissions
Be sure to select the permissions you wish to give this person. The PI/Faculty Supervisor must always be granted Full Access.

Full Access

Read-Only

Has this person completed the CORE (TCPS2) tutorial?

Yes

No

As per the Waterloo policy on [mandatory research ethics training](#), if you completed the TCPS2 tutorial more than 5 years ago, you may be asked to update your training within the next 6 months. You will be notified by email if this is the case.

Once you click on the 'Yes' to completion of the TCPS2 tutorial it will open up additional fields

Has this person completed the CORE (TCPS2) tutorial?

Yes

No

Date of completion on TCPS2 certificate (Required)

Upload a copy of the TCPS2 certificate (Highly recommended, optional at this time)
File name should include document purpose, version number, and date (e.g., RecruitmentPoster_version1_20180425)
PDF format is preferred

As per the Waterloo policy on [mandatory research ethics training](#), if you completed the TCPS2 tutorial more than 5 years ago, you may be asked to update your training within the next 6 months. You will be notified by email if this is the case.

Click 'Done' when you have add all the information.

Currently, there is not a centralized 'researcher profile' that stores the information to be populated on subsequent protocols. You must add this information for each **new** protocol.