1. Please go to Path BioResource home page at https://somapps.med.upenn.edu/pbr/portal/

2. In order to reach **PI Management** page:
   a. *If you are PI:* From Left hand side menu Click on **PI_Principal Investigator,** the first link under **Project Management**
   b. *If you are Lab manager:* Click on **Lab Manager** Link, the second link under **Project Management.** If you are lab manager for only one PI, you will go directly to PI page and if you manage more than one PI you will see a list of PIs and you can select one.
   c. *If you are BA:* Click on **BA-Business Administrator** link-- the third link under **Project Management.** At the bottom of the page, select the PI you want to manage and click on **List Projects** button.

3. Once you arrive at PI management page, hover over the top section of page **Additional Management Tools**. The page will extend and from new controls please click on **CAMRIS Protocol**.

4. On the next page, all the protocols for which the PI is given as main or Co-investigator are listed. Each table row presents one protocol.

5. Under **Current Funding source** the nickname of 26 digit number that will pay activities on this protocol for CAMRIS studies is listed. If there is no funding assigned, there will be a text in yellow background indicating **No funding source assigned**. If there is already a funding source assigned, you can see the 26 digit fund number by hovering with your mouse over the project nickname.

6. Under **Other Available Funding Source**, all available funding for Main and Co-investigator are listed. You can select a funding source from that list and click **Submit** to assign a new funding account to the protocol.

    Note: You can assign funding source to one or many protocols at once.
    Note: After a funding source is changed, any protocol activity will be billed to that account.

7. If desired funding source it not listed, you can go back to **PI Management** page and add award grant or non-grant funds through **Add Project Section.**

8. Click on each protocol number to see detail about protocol members

9. If you click on the protocol number, a popup will open and list protocol members. The first section lists those who are assigned through IRB protocol and you cannot add or remove them. If there is someone who needs access to this protocol and not listed in first section, please enter his/her PennKey or PennID and click on **Add New Member**. In the third section, all the users who are assigned to this protocol outside of the IRB will be listed. To remove a user, click on the

red X. Example below.