

## What is a Proxy?

A Proxy is an optional security role assigned by the PI to another member of the registration team which allows them to create, edit, and submit new submissions on the behalf of the PI on that one registration.

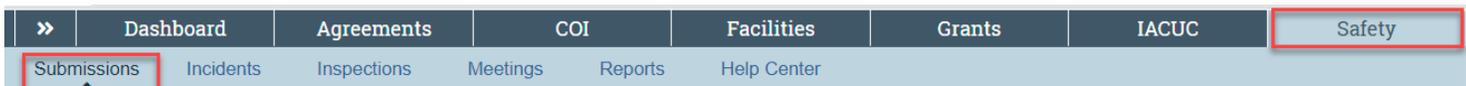
## General Guidance:

- PIs assign Proxies
- Proxies are assigned on each registration
- All Proxies MUST be names as Registration Team Members first (See IBC User Guide- How to Create and Submit Key Personnel Changes)
- There can be more than one Proxy assigned to each registration
- The Proxy is cc'ed on all notifications sent to the PI

## How to Assign a Proxy:

### Step 1

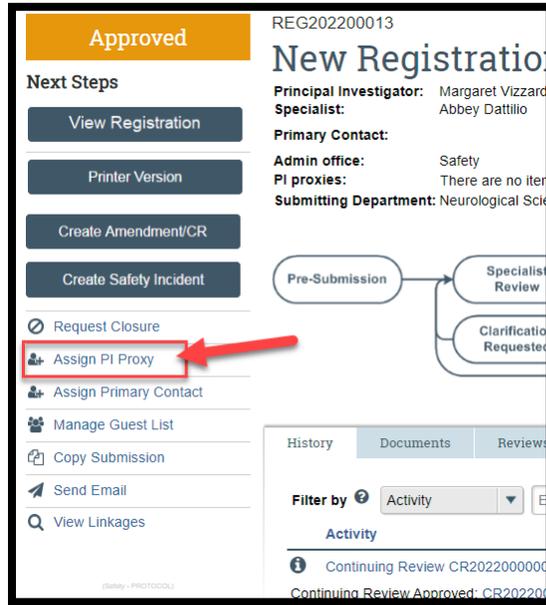
- The PI must log into UVMClick
- Search for the applicable registration and click the registration name to open it
- 



| In-Review    |                  | Active             | Archived | Suspended or Lapsed | All Submissions |                        |                       |                  |                    |                 |
|--------------|------------------|--------------------|----------|---------------------|-----------------|------------------------|-----------------------|------------------|--------------------|-----------------|
| ID           | Name             | Date Modified      | State    | PI First Name       | PI Last Name    | Coordinator First Name | Coordinator Last Name | Submission Type  | Safety Review Type | Expiration Date |
| REG202200013 | New Registration | 11/27/2022 8:07 AM | Approved | Margaret            | Vizzard         | Abbey                  | Dattilio              | Initial Protocol | Biosafety          | 11/26/2023      |

## Step 2

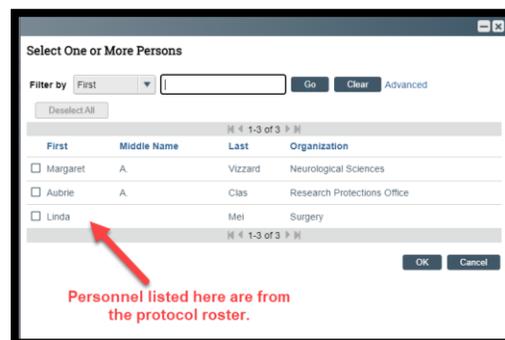
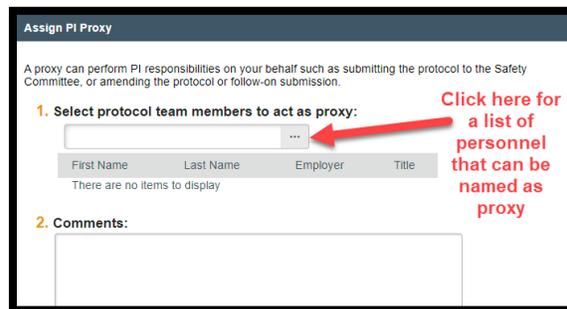
On the left side of the screen, click the activity called “Assign PI Proxy”



## Step 4

A pop-up window will open. Click the “...” to bring up a list of personnel that can be named as proxy. Choose a name and click “ok” at the bottom of the window.

**NOTE:** if the person you would like to name as proxy is not listed here, it means they are not listed on the roster. Please see instructions for “How to Change Key Personnel”.



## Step 5

Your new proxy will now be listed on the main page of the protocol.

**Approved** REG202200013

### New Registration

**Principal Investigator:** Margaret Vizzard  
**Specialist:** Abbey Dattilio  
**Primary Contact:**  
**Admin office:** Safety  
**PI proxies:** Aubrie Clas  
**Submitting Department:** Neurological Sciences

**Next Steps**

- View Registration
- Printer Version
- Create Amendment/CR
- Create Safety Incident
- Request Closure
- Assign PI Proxy

Pre-Submission → Specialist Review → Clarification Requested → Specialist Review