What is a Proxy?

A Proxy is an optional security role assigned by the PI to another study team member giving them authority to edit and submit new protocol submissions on behalf of the PI for that one protocol.

General Guidance

- PIs assign Proxies
- Proxies are assigned on each protocol
- All Proxies MUST be named as Study Team Members first (See IRB Quick Guide - How to Add a Study Team Member)
- There can be one, multiple, or no Proxies assigned to a protocol
- All notifications that go to the PI will also go to the Proxy

How to Assign a Proxy

Step 1

Search for the applicable study (protocol) and click the study name to open it.

**TIP** Don’t forget! You can use the % character as a wildcard when searching for a protocol (see IRB Quick Guide - Searching for a Protocol - for more details)
Step 2

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

Assign PI Proxy

Step 3

In the subsequent pop-up click the ellipse (…)

Step 4

A second pop-up will present. Select the name of the person you would like to name as a Proxy by checking the appropriate checkbox next to their name and click OK.
Step 5

Click OK again

The new choice will now display at the top of the protocol

**TIP** If the person you want to choose to be a Proxy is not on the list to be checked, then a MOD submission to add that person to the study team member list (aka Key Personnel change) must be done first. See IRB Quick Guide - How to Add a Study Team Member. Once that MOD is approved, their name will be available to be selected as a Proxy as described in this quick guide.