

## 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

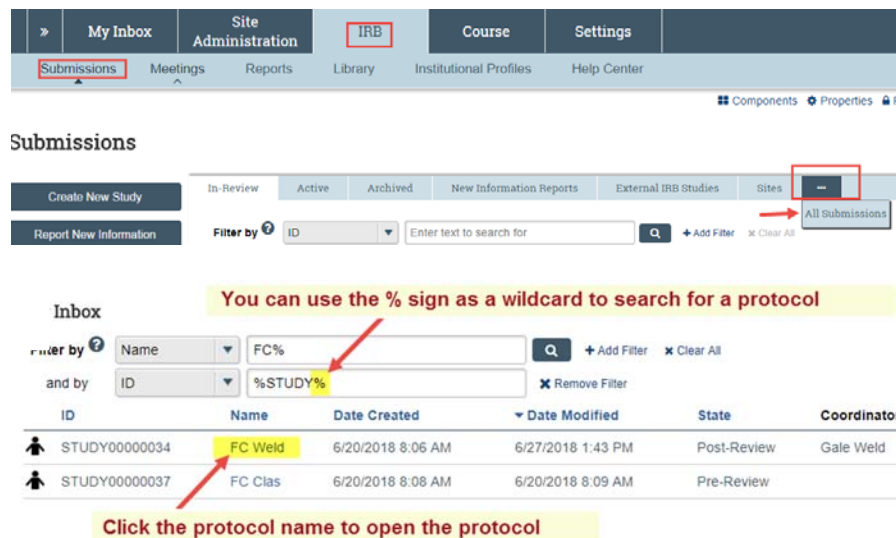
- PIs assign Proxies
- Proxies are assigned on each protocol
- All Proxies MUST be named as Study Team Members first  
(See IRB Quick Guide - How to Add a Study Team Member)
- There can be one, multiple, or no Proxies assigned to a protocol
- All notifications that go to the PI will also go to the Proxy

### 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)



**You can use the % sign as a wildcard to search for a protocol**

ID	Name	Date Created	Date Modified	State	Coordinator
STUDY00000034	FC Weld	6/20/2018 8:06 AM	6/27/2018 1:43 PM	Post-Review	Gale Weld
STUDY00000037	FC Clas	6/20/2018 8:08 AM	6/20/2018 8:09 AM	Pre-Review	

**Click the protocol name to open the protocol**

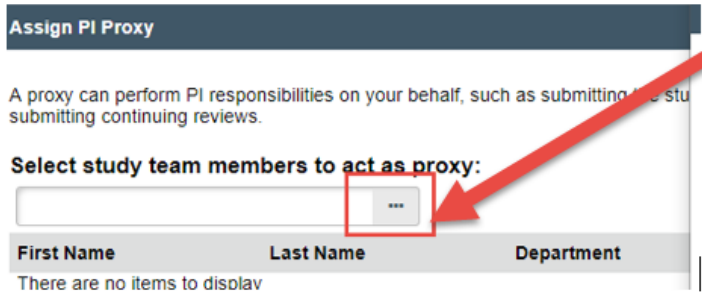
## Step 2

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 (...)



**Assign PI Proxy**

A proxy can perform PI responsibilities on your behalf, such as submitting the study or submitting continuing reviews.

Select study team members to act as proxy:

...

First Name	Last Name	Department
There are no items to display		

A red arrow points to the ellipse (...) button in the search input field.

## 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.



**Select One or More Persons**

Filter by Last

Total Selected: 1

Last	First	Organization
<input checked="" type="checkbox"/> Abajian	Michael	Nursing
<input type="checkbox"/> Abajian	John	Anesthesiology

Total Selected: 1

A red arrow labeled '1' points to the checkbox for Michael Abajian. Another red arrow labeled '2' points to the OK button.

## Step 5

Click OK again

### Assign PI Proxy

A proxy can perform PI responsibilities on your behalf, such as submitting the study to the IRB, modifying the study, and submitting continuing reviews.

Select study team members to act as proxy:

First Name	Last Name	Department
Michael	Abajian	Nursing

OK

Cancel

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

## STUDY00000041: FC Weld

Principal investigator: System Administrator  
IT Administrator

IRB office: CHRMS (Medical)

IRB coordinator: Sarah Wright

Submission type: Initial Study

Primary contact: System Administrator

PI proxies: Michael Abajian  
John Abajian

Submitting Department: Huron Consulting, Inc.

**\*\*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.