What is a Proxy?

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

General Guidance

- PIs assign Proxies
- Proxies are assigned on each registration
- All Proxies MUST be named as Registration Team Members first
  (See IBC User Guide - How to Create and Submit an Amendment)
- There can be one, multiple, or no Proxies assigned to a registration
- All notifications that go to the PI will also go to the Proxy

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.

**TIP** Don’t forget! You can use the % character as a wildcard when searching for a registration (see IBC User Guide - Searching for a Registration or Submission - for more details)
Step 2
On the left side of the screen, click the activity called “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 registration workspace
**TIP**  If the person you want to choose to be a Proxy is not on the list to be checked, then an Amendment submission to add that person to the registration team member list (aka Key Personnel change) must be done first. See IBC User Guide - How to Create and Submit an Amendment. Once that Amendment is approved, their name will be available to be selected as a Proxy as described in this user guide.