Overview

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

Please note, PI proxy(ies) cannot complete the PI assurances on behalf of the PI.

Assigning PI Proxy(ies)

On the main study page, the Principal Investigator will have an activity called Assign PI Proxy.

The Assign PI Proxy activity will appear in a pop-up:

1. Select study team members to act as proxy:
   - First Name
   - Last Name
   - Department
   - There are no items to display

2. Select personnel who act as proxy on the lead site:
   - First Name
   - Last Name
   - Department
   - There are no items to display
All PI proxy(ies) should be added to #1. Start by typing the Local Study Team Members name in the box and select the appropriate staff.

If the staff members name is not appearing, this means they have not been listed in the Local Study Team Members. Please stop here, return to the smartform or utilize the Edit Study Personnel activity to add the staff. Once added, you will now be able to add them to option #1.