Click IRB **Reference Guide**
Assigning PI Proxy or Primary Contact

This Guide will help me to know?

- How to assign a PI Proxy
- How to assign a Primary Contact

Click IRB is designed so that studies and follow-on actions are submitted by the Principal Investigator or a study team member(s) assigned as PI Proxy. The PI Proxy can submit all actions to the IRB on behalf of the PI.

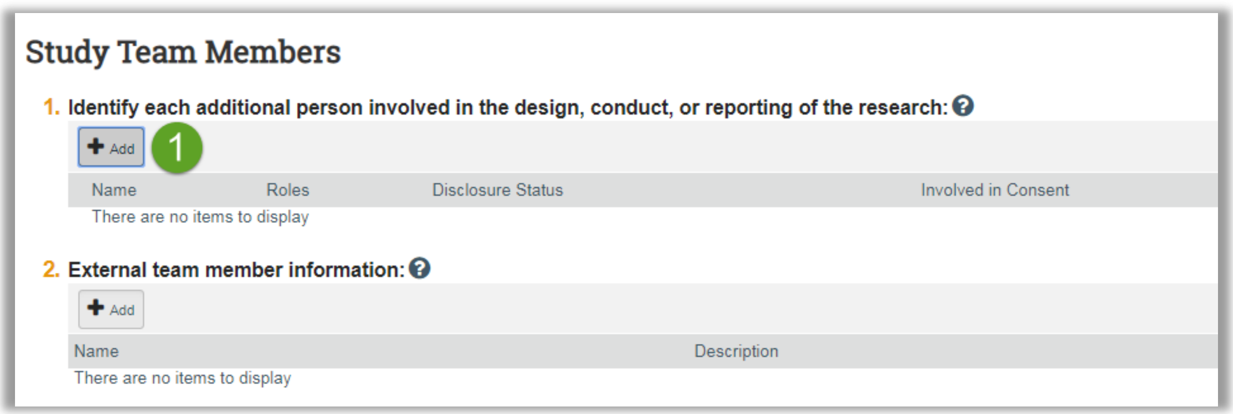
To Assign a PI Proxy

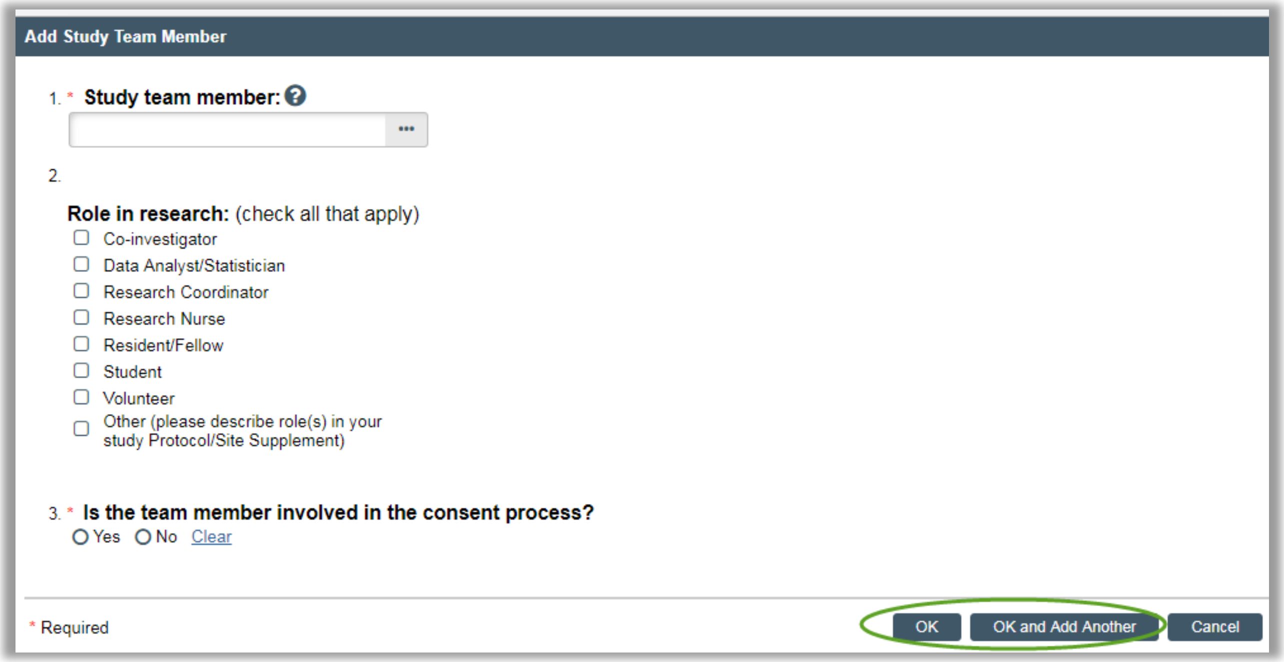
Step 1

Steps 1 and 2 are only for initial study submissions.

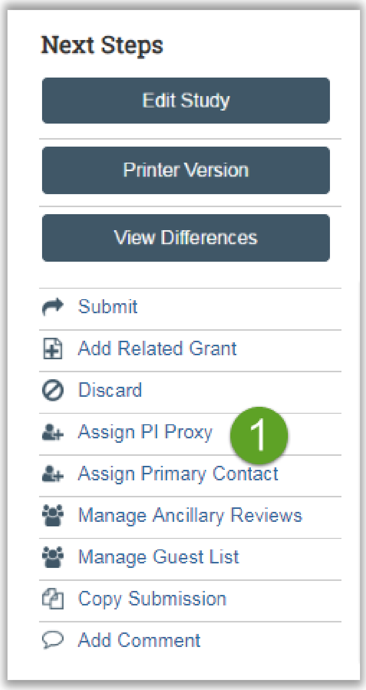
If your study is already approved and the prospective PI proxy is already an approved team member, you can skip to **Step 3**.

From the Study Team Members page, click **Add.** Select the appropriate person and answer the questions. Click **OK** if adding only one study team member or choose **OK and Add Another** to select additional study team members.





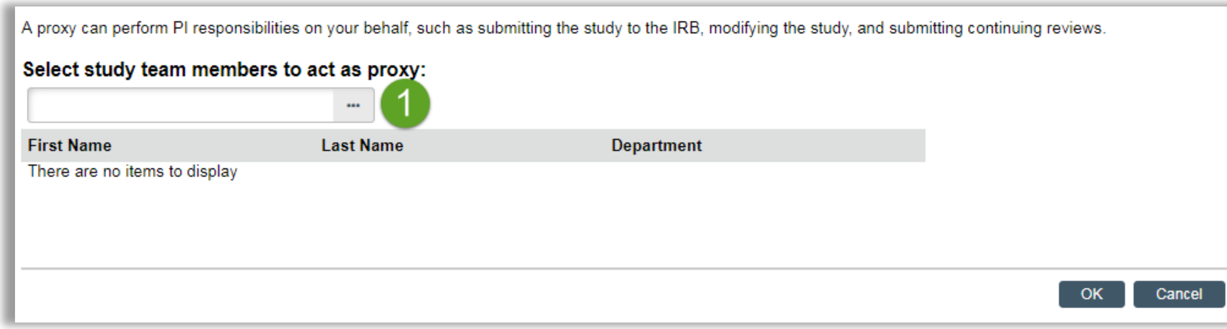
Step 2	When returned to the **Study Team Members** page, use the **Continue** button to navigate through the remaining pages of the SmartForm. On the last page, select **Save and Close** to return to the study workspace.

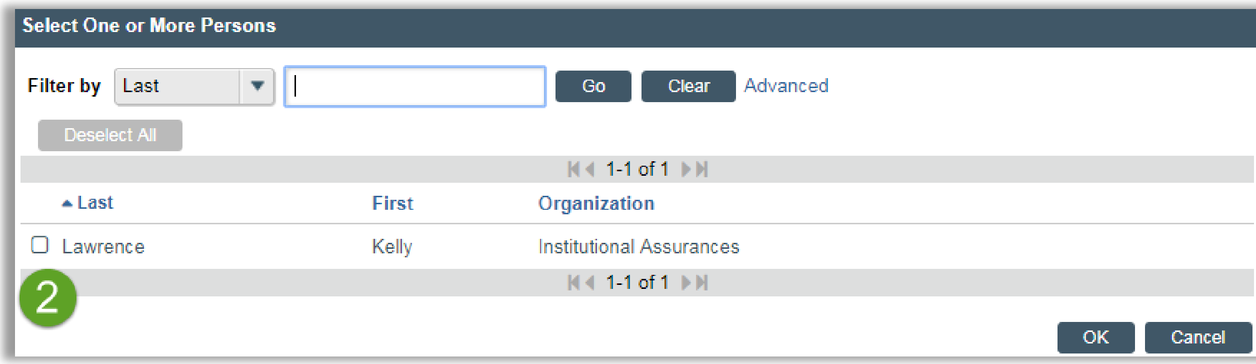
Step 3	From the Study Workspace, in the sidebar **Next Steps** Menu, choose **Assign PI Proxy.** **Tip**: If you are dealing with an external IRB study, this activity is only available on the Site Record and not the Study record. Please see the External IRB Reference Guide on the Click IRB Resources page for more information about Site and Study records.. 

Assigning PI Proxy or Primary Contact

Step 4

On the **Assign PI Proxy** pop-up, check the box next to the person(s) to be assigned as PI Proxy. You can choose as many as desired.





Step 5

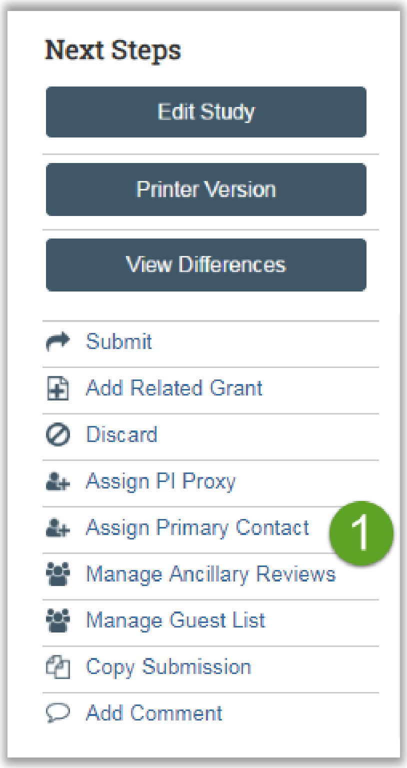
Click **OK.**

To Assign a Primary Contact

Click IRB also provides for the assignment of a Primary Contact who receives email notifications about the study. The PI and all designated Proxies will continue to receive notifications regardless of the Primary Contact assignment.

You can only assign one Primary Contact in Click IRB. By default, the person who created the study in the system is the Primary Contact, but this can be changed if desired. Modifications or continuing reviews have the same Primary Contact as the initial study.

Step 1	To change the Primary Contact, from the open study, click **Assign Primary Contact** from the **Next Steps** list on the left. **Tip**: If you are dealing with an external IRB study, this activity is only available on the Site Record and not the Study record. Please see the External IRB Reference Guide on the [Click IRB Resources page] for more information about Site and Study records.



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Assigning PI Proxy or Primary Contact

Step 2

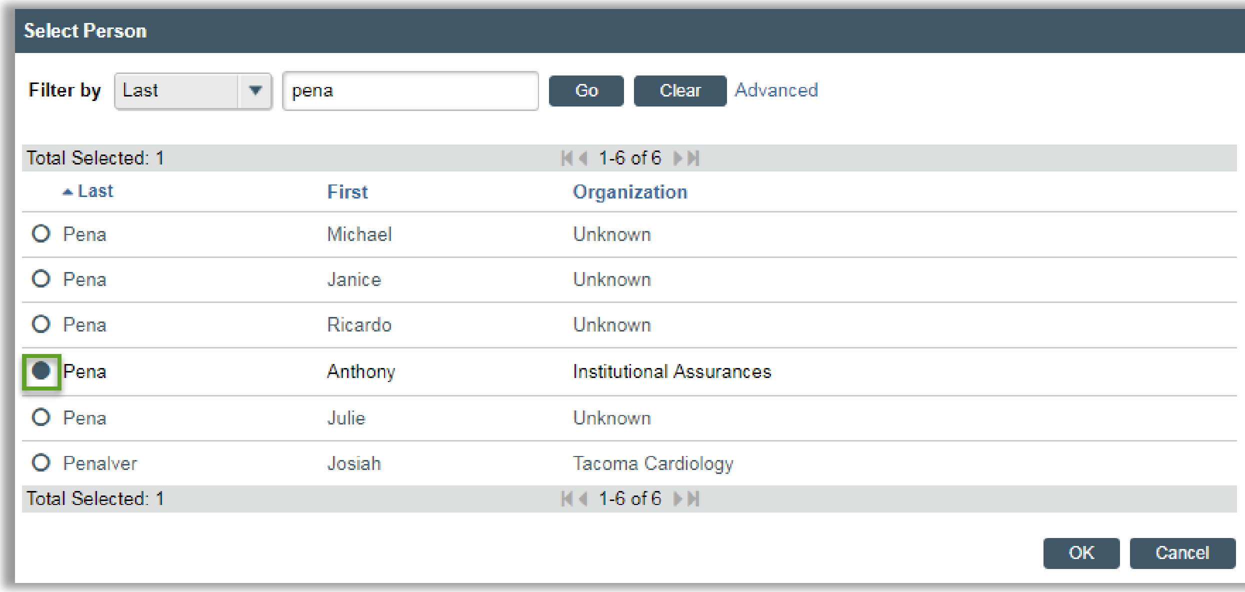
A new window opens. Click on the **X** button to remove the current contact or on the ellipsis to open a list of names to choose the new contact.

Step 3

Begin typing the name of the new contact. A list of matching names appears.

Step 4

Select the correct name



Step 5

Click **OK. Note:** If the Primary Contact is also engaged in the research, he/she should be listed as a study team member in the study SmartForm.

More questions? Contact the Institutional Review Board by email or at x77804.