

# How to add a PI Proxy and Primary Contact to an IRB study

**This is a quick 4 slide guide to help you add a PI Proxy and Primary Contact to an IRB study**

## **Important to note:**

- Only the PI may assign the PI Proxy and Primary Contact.
- There may only be one Primary Contact per study.
- You **must** be in the study workspace to add the PI Proxy and Primary Contact. If you are trying to add a PI Proxy and/or Primary Contact during a follow on submission (such a modification), you will need to navigate back to the study workspace to assign these roles. You cannot add a PI Proxy or PI Contact in the follow up submission. See [Slide 4](#) for guidance.

## How to assign a PI Proxy

The PI proxy(ies) may act on behalf of the Principal Investigator of the study. PI proxy(ies) may submit a study for initial review, modify the study, or submit for continuing review. The PI may assign more than one proxy, but all proxies must be listed as team members within the study.

From the IRB Workspace

1. Click **Assign PI Proxy**
2. Select study team member to act as proxy  
**IMPORTANT!** Only individuals listed as study personnel in the IRB application, under **Local Study Team Members**, may be assigned as PI proxy.

The screenshot shows the IRB workspace interface. On the left, a sidebar contains a 'Next Steps' section with buttons for 'Edit Study', 'Printer Version', 'Submit', 'Assign PI Proxy', and 'Manage Ancillary Reviews'. The 'Assign PI Proxy' button is highlighted with a red box and a red circle containing the number '1'. The main content area is titled 'Assign PI Proxy' and includes a search input field for selecting a team member to act as proxy, which is also highlighted with a red box and a red circle containing the number '2'. Below the search field is a table of team members with columns for 'Last', 'First', and 'Organization'. The table lists three members: Avila, Joshua, Vice President For Research; Drake, Kelly, Vice President For Research; and Murphy, Natalie, Vice President For Research.

Last	First	Organization
Avila	Joshua	Vice President For Research
Drake	Kelly	Vice President For Research
Murphy	Natalie	Vice President For Research

## How to assign a Primary Contact

The Primary Contact will receive study-related notifications, same as the PI, but they will not be able to submit on behalf of the PI.

From the IRB Workspace

1. Click **Assign Primary Contact**
2. Select individuals you want to assign as Primary Contact

The screenshot displays the IRB workspace interface. On the left, a vertical menu contains several options: 'Create Modification/CR', 'Report New Information', 'Assign Primary Contact', 'Assign PI Proxy', 'Manage Ancillary Reviews', 'Manage Guest List', and 'Add Related Grant'. A red circle with the number '1' is positioned to the left of the 'Assign Primary Contact' option, which is also highlighted with a red rectangular box. On the right, a modal window titled 'Assign Primary Contact' is open. It features a red circle with the number '2' above a red rectangular box that encloses a text input field. The input field is currently empty and has a dropdown arrow on its right side. Below the input field, there are 'OK' and 'Cancel' buttons. The browser's address bar at the top shows the URL: <https://hrsptamustage2.huronclick.com/IRB/sd/ResourceAdministration/Activity/form?ActivityType=com.webridge.entity.Entity%5B0ID%5BB07978C18037...>

How to navigate from a follow on submission back to the main study.

If you are currently working on a follow on submission and want to assign a PI Proxy or Primary Contact, you will need to navigate back to the main study. To do so, click on the name of your study above the submission state icon.

The screenshot displays a web application interface with a top navigation bar containing 'Dashboard', 'Admin', 'COI', and 'IRB'. Below this is a secondary menu with 'Submissions', 'Meetings', 'Reports', 'Library', 'Institutional Profiles', and 'Help C'. The main content area shows a breadcrumb trail: 'IRB > Study Test 123456 > Modification / Update #1 for Study Study Test 123456'. A red box highlights 'Study Test 123456', with a red arrow pointing from the text on the left to it. Below the breadcrumb is a large orange button labeled 'Post-Review'. To the right of this button, the title 'MOD00000017: Modification / U' is visible. Further right, details for the submission are listed: 'Principal investigator: Denise Puga', 'Submission type: Modification / Update', and 'Primary contact: Denise Puga'. Below these details is the 'PI Department: Research Compliance & Biosafety'. At the bottom right, a process flow diagram shows three rounded rectangular boxes: 'Pre-Submission', 'Pre-Review', and 'IRB Review', connected by arrows from left to right.

Dashboard Admin COI IRB

Submissions Meetings Reports Library Institutional Profiles Help C

IRB > **Study Test 123456** > Modification / Update #1 for Study Study Test 123456

**Post-Review**

Entered IRB: 10/19/2023 10:26 AM  
Last updated: 11/13/2023 8:55 AM

**Next Steps**

View Modification/CR

Printer Version

**MOD00000017: Modification / U**

**Principal investigator:** Denise Puga  
**Submission type:** Modification / Update  
**Primary contact:** Denise Puga

**PI Department:** Research Compliance & Biosafety

Pre-Submission → Pre-Review → IRB Review