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.
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
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.