

ASSIGNING A PI PROXY

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Browsers Currently Supported: Windows and Macintosh - Mozilla Firefox; Google Chrome


Please **do not** use Microsoft Internet Explorer or Microsoft Edge

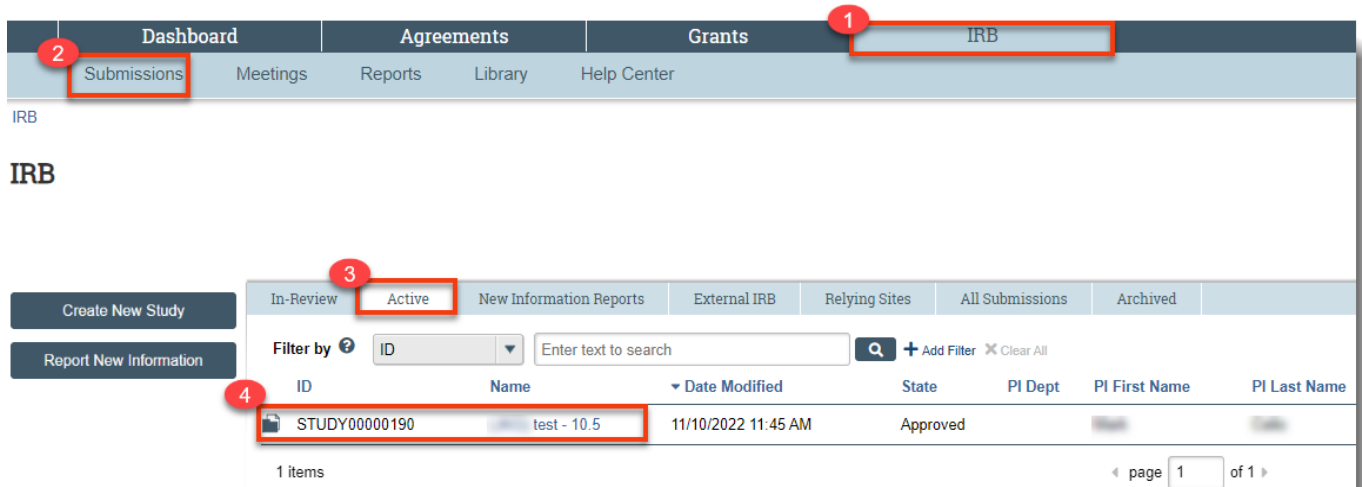
When you [log in](#) with your Brown credentials, your landing page will be your Dashboard.

Assigning a PI Proxy from an Active Study

Step	Action to be Taken with Screenshot
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1

1. Navigate to the **IRB** workspace,
2. Select **Submissions** tab,
3. Select **Active** tab,
4. Click on the **folder symbol** () or the **Name** of the submission to open.



The screenshot shows the IRB workspace interface. At the top, there are navigation tabs: Dashboard, Agreements, Grants, and IRB. The IRB tab is highlighted with a red box and a red circle labeled '1'. Below the IRB tab, there are sub-tabs: Submissions, Meetings, Reports, Library, and Help Center. The Submissions tab is highlighted with a red box and a red circle labeled '2'. Below the sub-tabs, there are buttons for 'Create New Study' and 'Report New Information'. Below these buttons, there are filter tabs: In-Review, Active, New Information Reports, External IRB, Relying Sites, All Submissions, and Archived. The Active tab is highlighted with a red box and a red circle labeled '3'. Below the filter tabs, there is a search bar with the text 'Enter text to search' and a search icon. Below the search bar, there is a table with columns: ID, Name, Date Modified, State, PI Dept, PI First Name, and PI Last Name. The first row of the table is highlighted with a red box and a red circle labeled '4'. The first row contains the following data: ID: STUDY00000190, Name: test - 10.5, Date Modified: 11/10/2022 11:45 AM, State: Approved, PI Dept: [redacted], PI First Name: [redacted], PI Last Name: [redacted]. Below the table, there is a footer that says '1 items' and 'page 1 of 1'.

2

● Select **Assign PI Proxy**

Next Steps

- [View Study](#)
- [Printer Version](#)
- [Create Modification/CR](#)
- [Report New Information](#)
- [Assign Primary Contact](#)
- [Assign PI Proxy](#)
- [Manage Ancillary Reviews](#)
- [Manage Guest List](#)
- [Add Related Grant](#)
- [Add Comment](#)
- [Copy Submission](#)

3

A pop-up window appears

1. Either type in the proxy's name or click on the ... to find the individual from the drop-down list
2. Click **OK** to save

Assign PI Proxy

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

1. Select study team members to act as proxy:

1 ...

First Name	Last Name	Department
There are no items to display		

2

- *Note: The top of the study record will now populate with the proxy name under PI Proxies as a confirmation*

STUDY00000200: jkg test

Principal investigator: J	IRB office: IRB
Submission type: Initial Study	IRB coordinator:
Primary contact:	
PI proxies:	

Assigning a PI Proxy at time of Modification / Update

1 If new study team members are to be added at the time of a modification request / study update, and one or more are to be a PI Proxy, then during the modification / update:

Choose **Study Team Member Information** (as your only option or in addition to the other option available depending on the type of changes being made to your active study).

Modification / Continuing Review

Creating New: IRB Submission

Modification / Continuing Review / Study Closure

* What is the purpose of this submission? (DO NOT USE Modification and Continuing Review) ?

Continuing Review

Modification / Update

Modification and Continuing Review

[Clear](#)

i To change the PI, choose 'Other parts of the study/site' scope

Modification scope:

Study team member information

Other parts of the study

1. Navigate to the **Local Study Team Members** page
2. Click on **+Add**
3. Complete the **Add Study Team Member** required questions
4. Click **OK** to save

BROWN

Local Study Team Members

You Are Here: Minimum Wage L

Editing: IRB000008

Local Study Team

1. Identify each additional

2 + Add

Name	Roles
There are no items to display	

2. Identify each additional

+ Add

3 Add Study Team Member

1. * Study team member: ?

2. Role in research: (check all that apply)

Co-investigator

Research Assistant

Department Admin

Faculty Advisor

Project Admin

3. * Is the team member involved in the consent process?

Yes No [Clear](#)


4. * Does the team member have a financial interest related to this research? ?

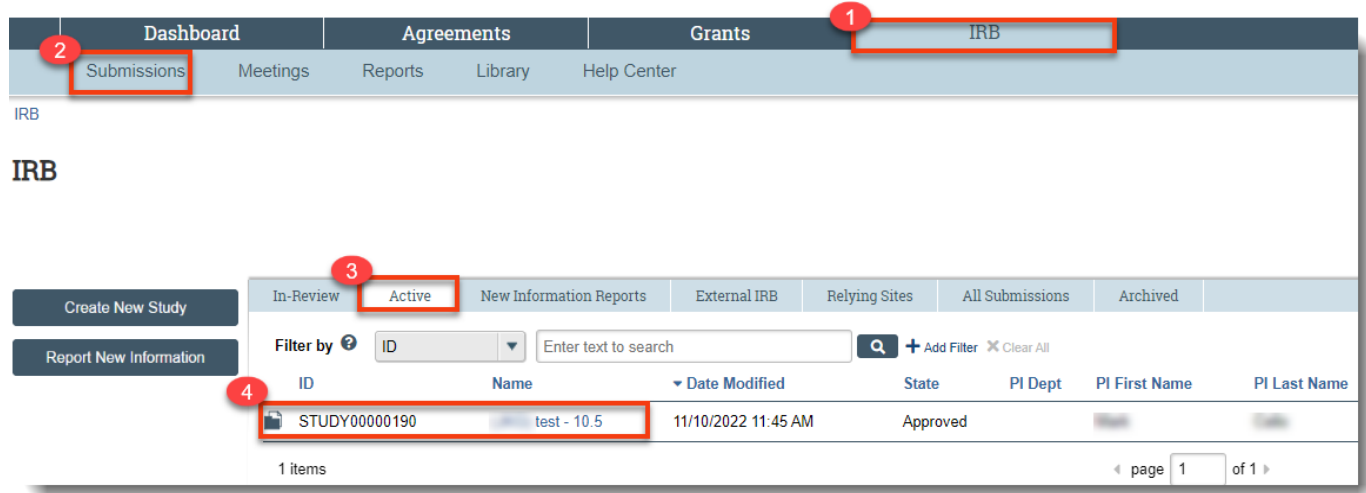
Yes No [Clear](#)

4 OK OK and Add Another Cancel

3

Once the modification request is reviewed and approved by either the HRPP or IRB, then:

1. Navigate to the **IRB** workspace,
2. Select **Submissions** tab,
3. Select **Active** tab,
4. Click on the **folder symbol** () or the **Name** of the submission to open.



The screenshot shows the IRB workspace interface. At the top, there is a navigation bar with tabs for Dashboard, Agreements, Grants, and IRB. The IRB tab is highlighted with a red box and a red circle labeled '1'. Below this, there is a sub-navigation bar with tabs for Submissions, Meetings, Reports, Library, and Help Center. The Submissions tab is highlighted with a red box and a red circle labeled '2'. On the left side, there are two buttons: 'Create New Study' and 'Report New Information'. The main content area shows a filter menu with 'Active' selected, highlighted with a red box and a red circle labeled '3'. Below the filter menu is a search bar and a table of submissions. The table has columns for ID, Name, Date Modified, State, PI Dept, PI First Name, and PI Last Name. The first row is highlighted with a red box and a red circle labeled '4', showing the ID 'STUDY00000190', Name 'test - 10.5', Date Modified '11/10/2022 11:45 AM', and State 'Approved'. At the bottom, it says '1 items' and 'page 1 of 1'.

4

- Select **Assign PI Proxy**

Next Steps



The 'Next Steps' menu contains several options, each in a dark blue button:

- View Study
- Printer Version
- Create Modification/CR
- Report New Information

Below these buttons is a list of actions with icons:

- Assign Primary Contact
- Assign PI Proxy** (highlighted with a red box)
- Manage Ancillary Reviews
- Manage Guest List
- Add Related Grant
- Add Comment
- Copy Submission

5

A pop-up window appears

1. Either type in the proxy's name or click on the ... to find the individual from the drop-down list
2. Click **OK** to save

Assign PI Proxy

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

1. Select study team members to act as proxy:

1

First Name

Last Name

Department

There are no items to display

2

OK

Cancel

- *Note: The top of the study record will now populate with the proxy name under PI Proxies as a confirmation*

STUDY00000200: jkg test

Principal investigator: J [redacted]

Submission type: Initial Study

Primary contact: [redacted]

PI proxies:

IRB office: IRB

IRB coordinator: