How to Assign a PI Proxy

<u>REQUIRED</u>: For student principal investigators, their faculty advisors are required to be added as a **PI Proxy**.

Note: The PI Proxy performs the same activities as the PI.

STEP 1

The **PI Proxy** must be entered in the Local Study Team Members SmartForm before assigning the PI Proxy on the Main Workspace.

• Click the "+Add" button.

Basic Study Information	Editing: STU	JDY00000	110				
Study Funding Sources	Local Study	Team Me	mbers				
Local Study Team Members	1. Identify each a	additional pers	on involved in th	e design, cond	uct, or reporting	of the research: 📀	
Study Scope	+ Add	Name	Roles	Financial Interest	Involved in Consent	E-mail	Phone
Study Scope Local Research Locations	+ Add	Name Michelle Wachter	Roles Research Assistant	Financial Interest	Involved in Consent	E-mail michelle.wachter@vanderbill.edu	Phone 1-615-322-3826
Study Scope Local Research Local Site Documents	+ Add Update 2. Identify other + Add	Name Michelle Wachter team members	Roles Research Assistant not in VERA suc	Financial Interest	Involved in Consent	E-mail michelle.wachter@vanderbill.edu	Phone 1-615-322-3826

Once you enter the person that you want as your PI Proxy in the Local Study Team Members SmartForm, move to Step 2.

STEP 2

On the Main Workspace of the New Study Submission, click Assign PI Proxy.

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Pre-Submission	STUDY00000110: Test		
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	Study Created Duncan Bigku, Laurel 12/12/2024 1:13 PM		more are no items to display

• An "Assign PI Proxy" pop-up window will open:

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- Item 1. Select study team members to act as proxy:
 - Enter "%FirstName LastName" or "%Last Name"
 - Note: The person you added on the Local Study Team Members SmartForm will show up here to select.
 - Click on OK
 - Back on the Main Workspace, you will see a status update of the PI Proxy you assigned

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Submit Assign PI Proxy	Clarification Requested	Carification Requested		
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Note:

If you do not find who the person you want to list as your PI Proxy, then return to <u>Step 1</u> and follow the instructions.