How to Assign a PI Proxy

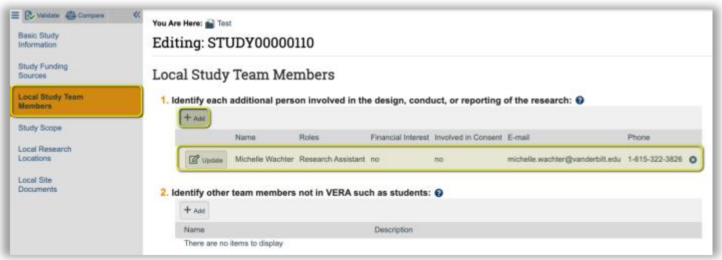
REQUIRED: For student principal investigators, their faculty advisors are required to be added as a **PI Proxy**.

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.

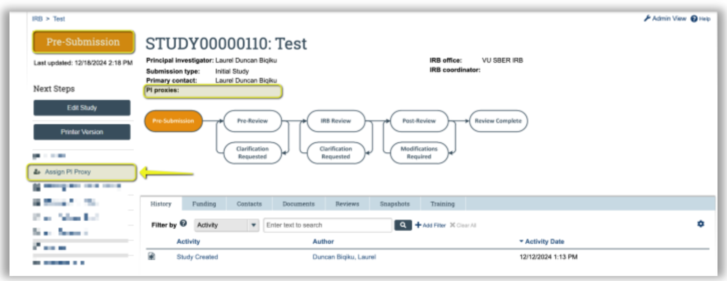
- **Click** the "**+Add**" button.

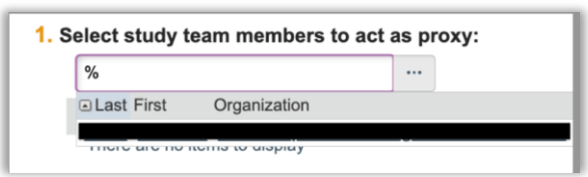


Once you enter the person that you want as your PI Proxy in the **Local Study Team Members SmartForm**, move to Step 2.

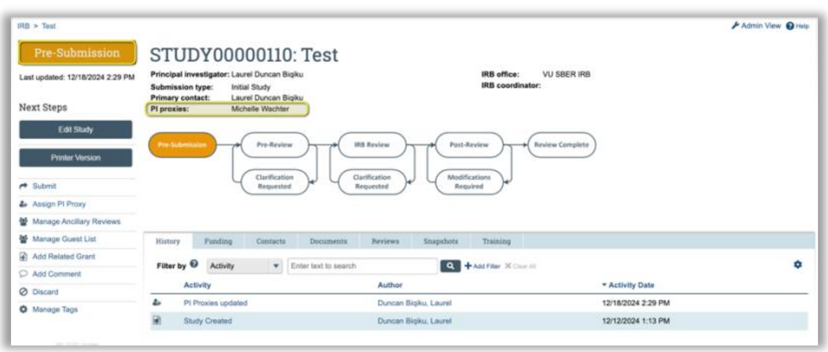
STEP 2

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





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



Note:
If you do not find who the person you want to list as your PI Proxy, then **return to Step 1 and follow the instructions.**