Creating a New IRB Application by Proxy

Authorized research staff may develop research protocols on behalf of the Principal Investigator (PI). When a user identifies a PI other than them, the system will enforce a proxy rule that will require that the identified principal investigator approve the application before the application process may begin. The PI may elect to cancel, modify or submit the application.

To Create a New IRB Application by Proxy:

1. Choose Create New from the menu bar.
2. Click on IRB Application.

3. Enter the Protocol Title in the field provided.
4. Click on Lookup to select the PI.

NOTE: When another user is creating a new IRB protocol on behalf of the PI, the statement, “Note: When the application is complete, it will be sent to the PI for submission,” will appear.
5. The **Find PI** popup screen is displayed. Enter the last name of the PI in the **Lookup** field provided.

![Find PI popup screen](image)

**NOTE:** This field is **CASE SENSITIVE** – Please begin typing a name by capitalizing the first letter.

**NOTE:** The last name of the logged in user will be the default value. If a name is not listed, please contact CUNY HRPP at hrpp@cuny.edu.

6. Click **Go** to locate the profile.
7. Click on a name to select the PI
8. Once selected, you may change the Principal Investigator by clicking on **Replace** and repeating steps 5 through 7.

![Create a New IRB Protocol](image)

9. Select the PI’s Department by clicking on the dropdown list provided and clicking on a value.
10. Click **Begin Application** when all information has been entered.
11. Click **Cancel** at any time to abandon the process.
PI Notification of Proxy Application

Once the proxy submits an application on behalf of the PI, the PI will receive the following task to revise and/or submit:

Opening the task will provide the following message:

To Continue with the Application:

1. In the Decision section select Yes.
2. Enter Comments to provide to the creator of the application in the field provided.
4. Review and revise the application as necessary.
5. To submit the application for review, click on the Submit tab.
The following screen will appear:

**Initial Application Submission**

<table>
<thead>
<tr>
<th>Submission Notes</th>
</tr>
</thead>
</table>

---

I certify that the statements herein are true, complete and accurate to the best of my knowledge.

☐ I Agree

6. Enter **Submission Notes**, if any, in the field provided.
7. Click the **I Agree** check box to accept the certification statement.
8. Click **Send for Review** to submit the application.