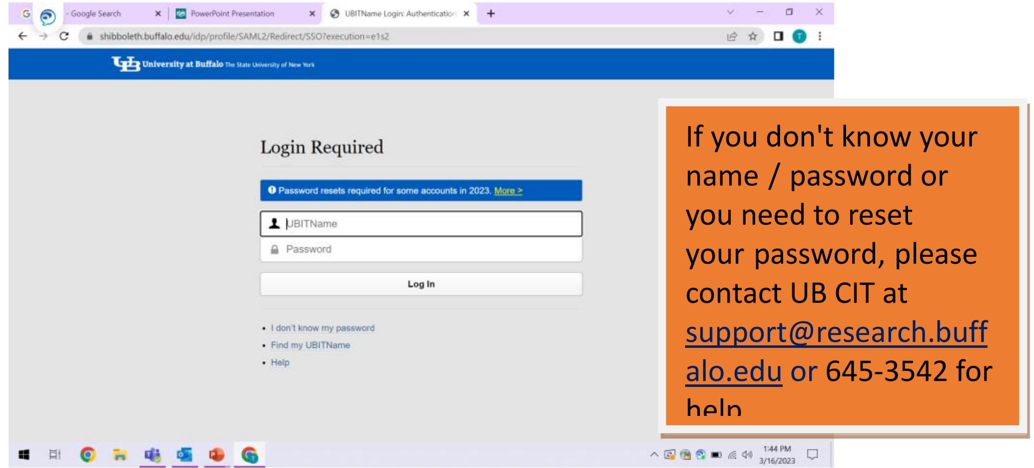
Quick Reference Guide: How to Add a PI Proxy

<table>
<tr>
<td>1. Log in to Click with UBIT name and password</td>
<td>
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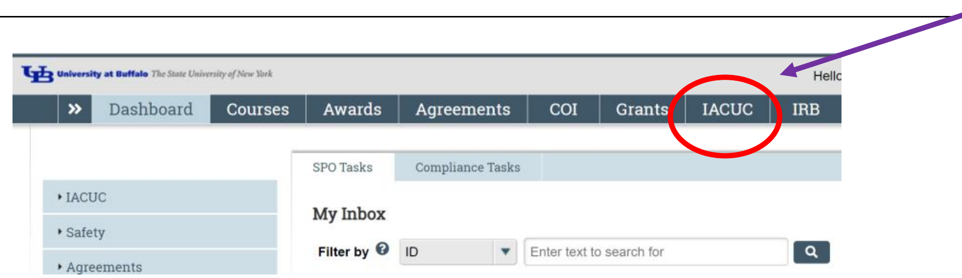
<td>2. Click on the IACUC tab in the bar across the top of the page</td>
<td>
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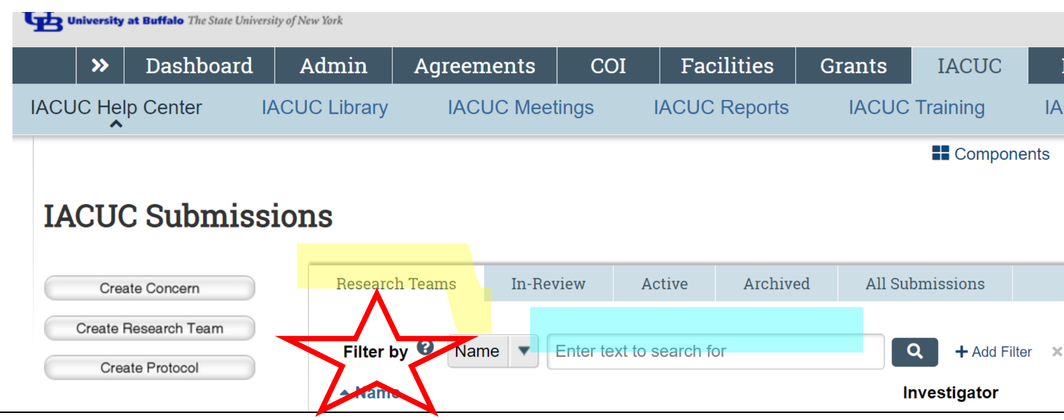
<td>3. Click on your Research Team – You can filter the Team Names for an easier find</td>
<td>
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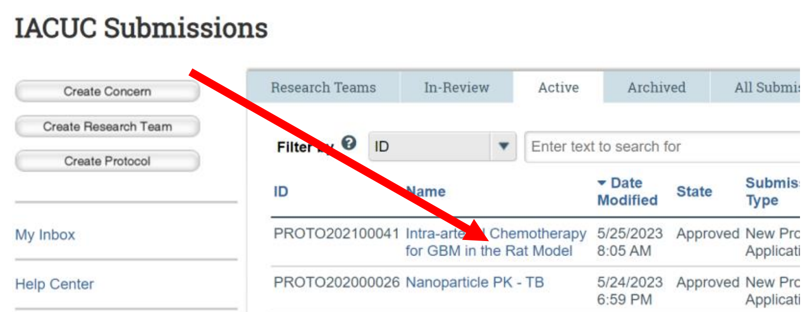
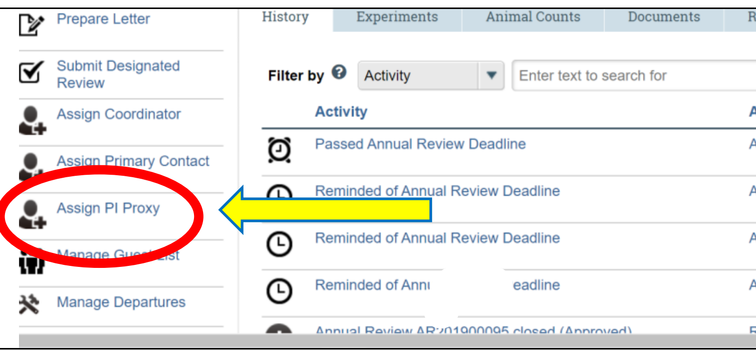
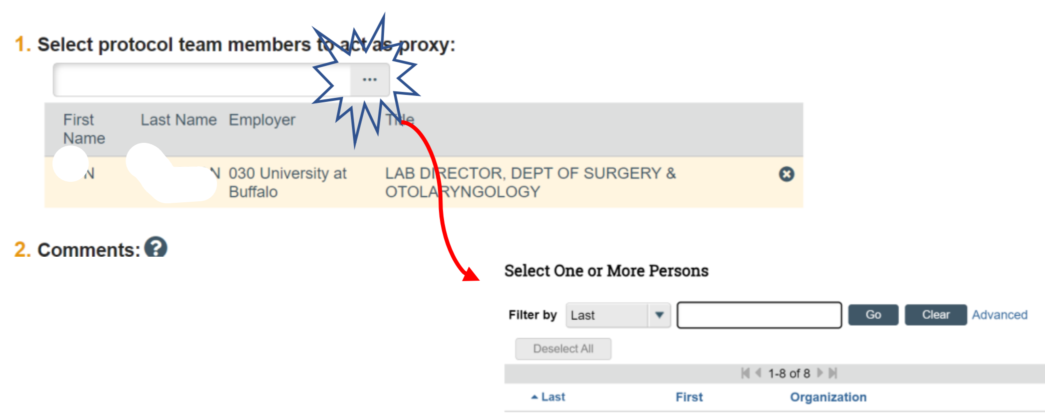
4. Find your study that you want to remove a **PI Proxy** for. Click on the **Name** of the study.



5. Click on **Assign PI Proxy** in the list of ***Current Actions*** on the left side of the screen. A window will pop up.



6. Click on the "…" to the right of the white rectangle in question 1 to view a list of the **Team Members**. In the pop-up window, click the box to the left of the **Name** to select that person.



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7. If a person’s name does not appear on this list, they will need to be added to the list of **Team Members**.

a. Click on the **IACUC** tab in the navigation bar across the top of the page.

b. Click on the **Name** of your **Research Team**.

c. Click the **Edit Research Team** button on the left side of the screen, under ***My Current Actions***.

d. Under Item 3, click on **+ Add** to open a pop-up window.

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e. Click on “…” to open a list of Click account holders.

f. Type the last name of your **Team Member** in the Filter box at the top of the page to shorten the list.

g. When you find your **Team Member** on this list, click the box to the left of their **Name** and click **OK**.

h. If your **Team Member** cannot be found in this list, they need to apply for a Click account, please ask them to go to https://www.buffalo.edu/research/research-services/click-implementation.html fill out the **Account Request.**

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8. Click **OK** in the bottom right of the **Assign PI Proxy** window to complete the process.

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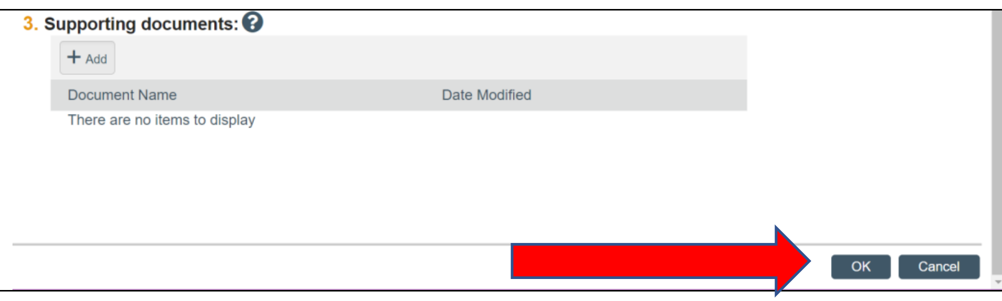

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