Quick Reference Guide: How to Add a PI Proxy

1. Log in to Click with UBIT name and password

2. Click on the IACUC tab in the bar across the top of the page

3. Click on your Research Team – You can filter the Team Names for an easier find

If you don't know your name / password or you need to reset your password, please contact UB CIT at support@research.buffalo.edu or 645-3542 for help.
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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.
   
   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](https://www.buffalo.edu/research/research-services/click-implementation.html) fill out the **Account Request**.

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