


How to Designate a PI Proxy in the new Georgetown-MedStar IRB System

November 30, 2018

Georgetown-MedStar IRB System

When you log into the system, you will be brought to your inbox.
Select the IRB tab on the top of the screen.

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 MedStar Health

**Georgetown-MedStar
IRB System**

Hello, Principal30 Investigator30

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My Inbox

IRB

Components

Create New Study

Report New Information

My Inbox

Filter by ID Enter text to search for + Add Filter × Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
CR00000002	Continuing Review for Study Test PI30 Study	10/15/2018 2:50 PM	10/15/2018 2:54 PM	Pre-Submission	

1 items

« page 1 of 1 »

25 / page

Submissions

Meetings


Reports

Library

Help Center

Once you are in the IRB tab, you will want to select the **“Active” tab**, indicated by the red arrow on the image. Once in the active studies tab, you can select the study you are submitting the amendment for by **clicking on the study title**.

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My Inbox

IRB

Submissions

Meetings

Reports

Library

Help Center

IRB

Create New Study

Report New Information

In-Review

Active

Archived

New Information Reports

External IRB Studies

Sites

All Submissions

Filter by ?

ID

Enter text to search for

Q

+ Add Filter

✕ Clear All

ID	Name	Date Modified	State	PI First Name	PI Last Name	Coordinator First Name	Coordinator Last Name	Submission Type
STUDY00000185	Training	11/19/2018 1:44 PM	Pre-Review	Principal30	Investigator30			Initial Study
STUDY00000138	job performance	11/14/2018 2:42 PM	Pre-Review	Principal30	Investigator30			Initial Study
STUDY00000116	STARA	11/14/2018 1:44 PM	Pre-Review	Principal30	Investigator30			Initial Study
STUDY00000084	yyy	11/13/2018 2:51 PM	Pre-Review	Principal30	Investigator30			Initial Study
MOD00000011	Modification #1 for Study Test PI30 Study	10/15/2018 3:12 PM	Pre-Review	Principal30	Investigator30			Modification
CR00000002	Continuing Review for Study Test PI30 Study	10/15/2018 2:54 PM	Pre-Submission	Principal30	Investigator30			Continuing Review
STUDY00000043	Test AC study 20181015	10/15/2018 2:41 PM	Pre-Review	Principal30	Investigator30			Initial Study

7 items


« page 1 of 1 »

25 / page

Once you arrive in the study workspace, you will have the option to **Assign a PI Proxy** on the left side of the workspace (indicated by a red arrow here).

Note: only individuals listed on the study can be assigned as PI proxy.

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My Inbox

IRB

Submissions

Meetings

Reports

Library

Help Center

Approved

Entered IRB: 10/15/2018 1:16 AM

Initial approval: 10/15/2018

Initial effective: 10/15/2018

Effective: 10/15/2018

Approval end: 10/14/2019

Last updated: 11/29/2018 6:08 PM

STUDY00000024: Test PI26 Study

Principal investigator: Principal26 Investigator26

Submission type: Initial Study

Primary contact: System Administrator

PI proxies:

IRB office: MHRI IRB

Committee:

IRB coordinator:

Letter: Correspondence_for_STUDY00000024.pdf(0.01)

Regulatory authority: Pre-2018 Requirements

Next Steps

View Study

Printer Version

View Differences


Create Modification/CR

Report New Information

Assign Primary Contact

Assign PI Proxy

Manage Guest List



History

Funding

Contacts

Documents

Follow-on Submissions

Reviews

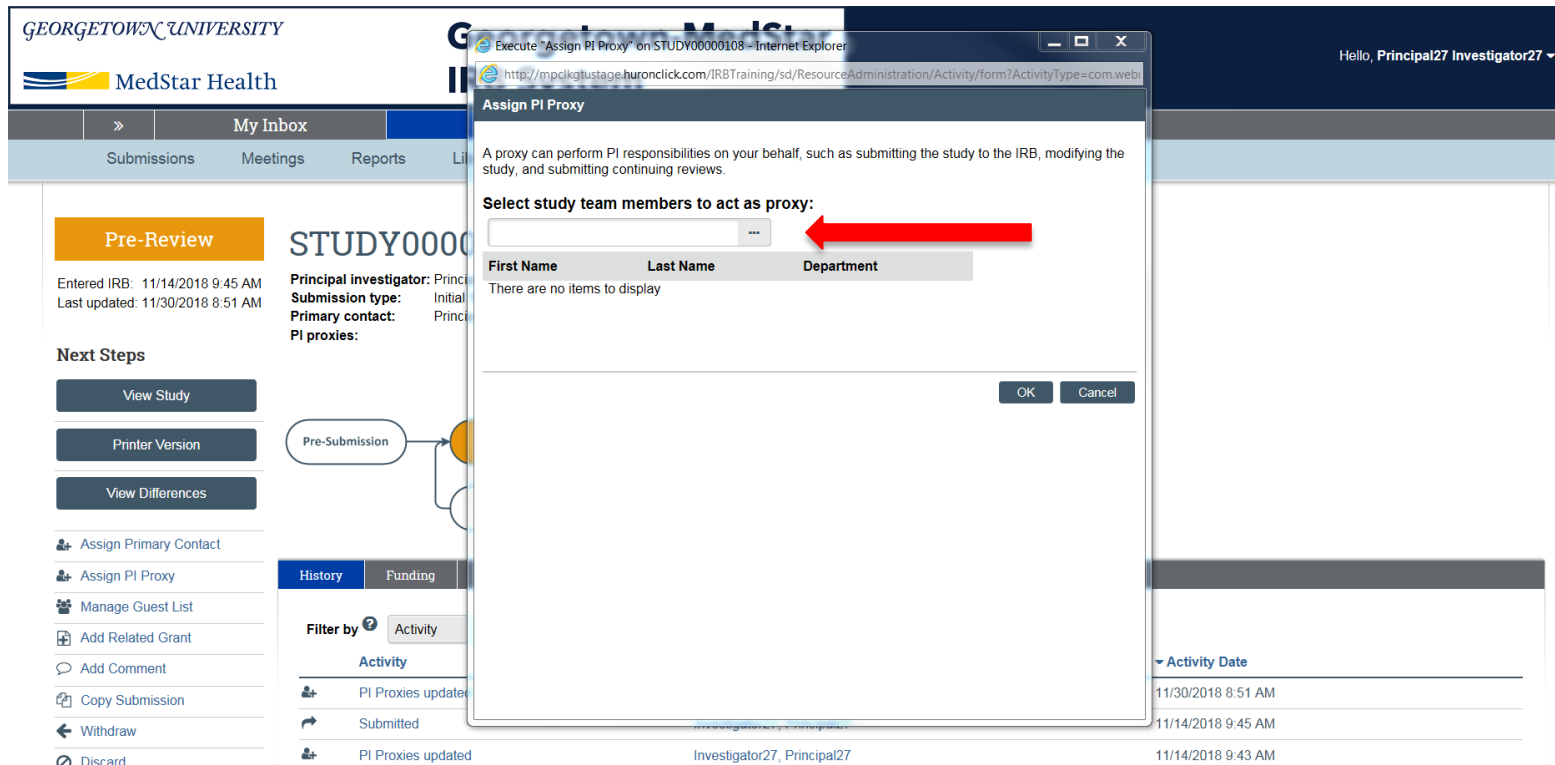
Snapshots

Training

Filter by [?] Activity ▾ Enter text to search for 🔍 + Add Filter ✕ Clear All

Activity	Author	Activity Date
Modification MOD00000033 Opened	Investigator26, Principal26	11/29/2018 6:08 PM
Modification: MOD00000033		
Modification MOD00000032 Opened	Investigator26, Principal26	11/29/2018 6:08 PM
Modification: MOD00000032		
Letter Sent	Administrator, System	10/15/2018 10:53 AM

Once you select Assign PI Proxy, a pop up window will appear. **Click on the three dots** in the drop down menu.



The screenshot displays the Georgetown-MedStar IRB System interface. A pop-up window titled "Assign PI Proxy" is overlaid on the main page. The pop-up contains the following text:

A proxy can perform PI responsibilities on your behalf, such as submitting the study to the IRB, modifying the study, and submitting continuing reviews.

Select study team members to act as proxy:

Below this text is a search bar with three dots (three dots icon) to its right. A red arrow points to this three dots icon. Below the search bar is a table with the following headers: First Name, Last Name, and Department. The table currently displays "There are no items to display". At the bottom of the pop-up are "OK" and "Cancel" buttons.

The background interface shows the "STUDY0000108" page. The left sidebar includes a "Next Steps" section with buttons for "View Study", "Printer Version", and "View Differences". Below this is a list of actions: "Assign Primary Contact", "Assign PI Proxy", "Manage Guest List", "Add Related Grant", "Add Comment", "Copy Submission", "Withdraw", and "Discard". The main content area shows the "Pre-Submission" workflow and a table of activities.

Activity	Activity Date
PI Proxies updated	11/30/2018 8:51 AM
Submitted	11/14/2018 9:45 AM
PI Proxies updated	11/14/2018 9:43 AM

Georgetown-MedStar IRB System

A second pop up window will appear, which will include the names of all individuals you have added to the study. Select the individual you wish to assign as PI proxy by **checking the box** next to their name. Then click **OK**.

The screenshot displays the Georgetown-MedStar IRB System interface. A pop-up window titled "Select One or More Persons" is open, showing a table of individuals. A red arrow points to the checkbox next to the name "Abalos, Kathleen" in the "Last" column. The background shows the main IRB system interface with a sidebar containing "Next Steps" and a main content area with a "Pre-Submission" button.

Next Steps

- View Study
- Printer Version
- View Differences
- Assign Primary Contact
- Assign PI Proxy
- Manage Guest List
- Add Related Grant
- Add Comment
- Copy Submission
- Withdraw
- Discard

Pre-Submission

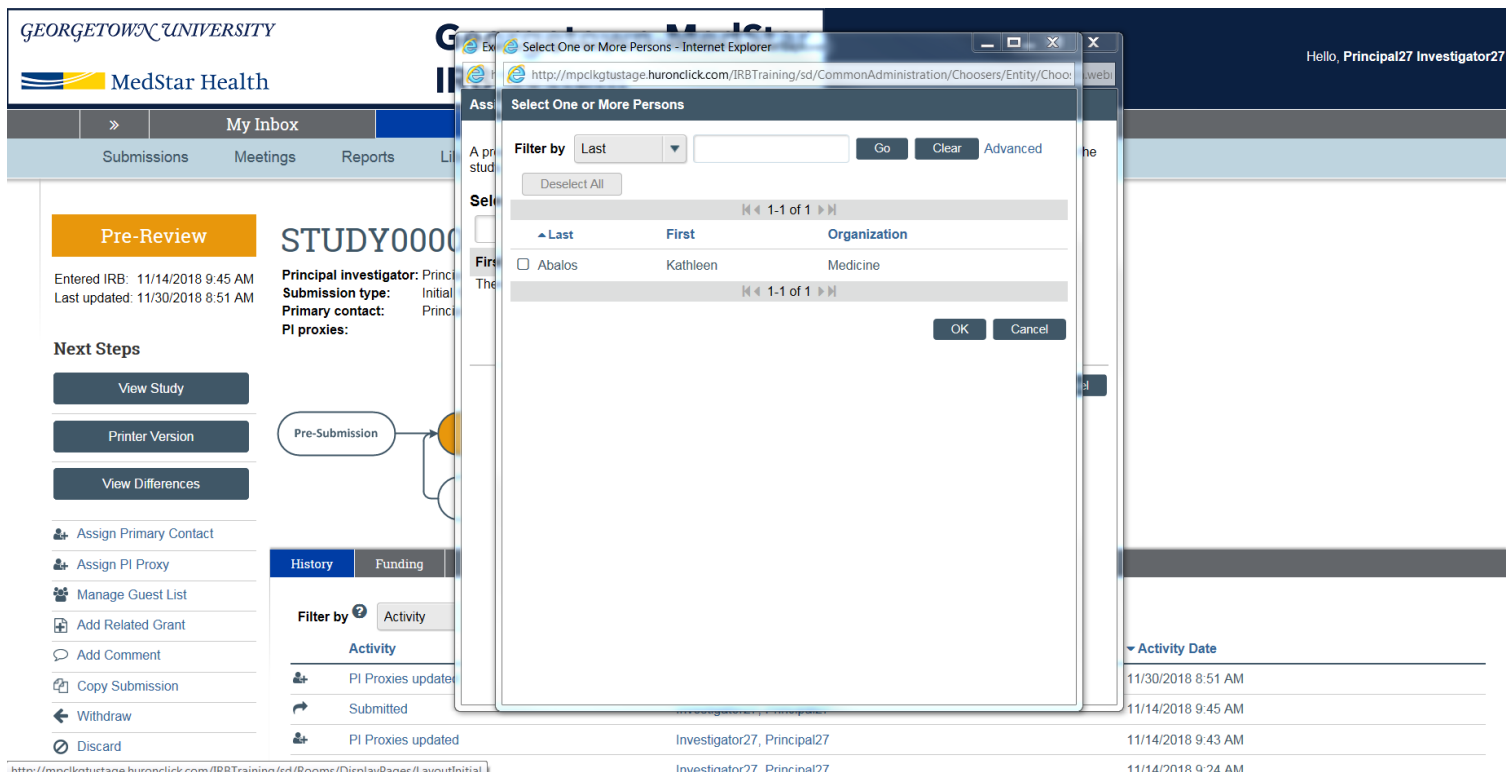
History **Funding**

Filter by **Activity**

Activity	Activity Date
PI Proxies updated	11/30/2018 8:51 AM
Submitted	11/14/2018 9:45 AM
PI Proxies updated	11/14/2018 9:43 AM
Investigator27, Principal27	11/14/2018 9:24 AM

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Note: Only individuals listed as study team members can be assigned as PI proxy. If there are no names in this pop up window, you will need to add people to your study before you can make this assigned. Refer to the guide on how to add a study team member to complete this task.



The screenshot displays the Georgetown-MedStar IRB System interface. The main page shows the 'Pre-Review' status for 'STUDY0000'. The 'Next Steps' section includes buttons for 'View Study', 'Printer Version', and 'View Differences'. A 'Pre-Submission' workflow diagram is visible. A pop-up window titled 'Select One or More Persons' is open, showing a list of individuals with columns for 'Last', 'First', and 'Organization'. The list includes 'Abalos, Kathleen' from 'Medicine'. The 'Filter by' dropdown is set to 'Last'. The 'OK' and 'Cancel' buttons are at the bottom of the pop-up.

STUDY0000

Entered IRB: 11/14/2018 9:45 AM
Last updated: 11/30/2018 8:51 AM

Principal Investigator: Principal Investigator
Submission type: Initial Review
Primary contact: Principal Investigator
PI proxies:

Next Steps

- View Study
- Printer Version
- View Differences

Pre-Submission

History **Funding**

Filter by **Activity**

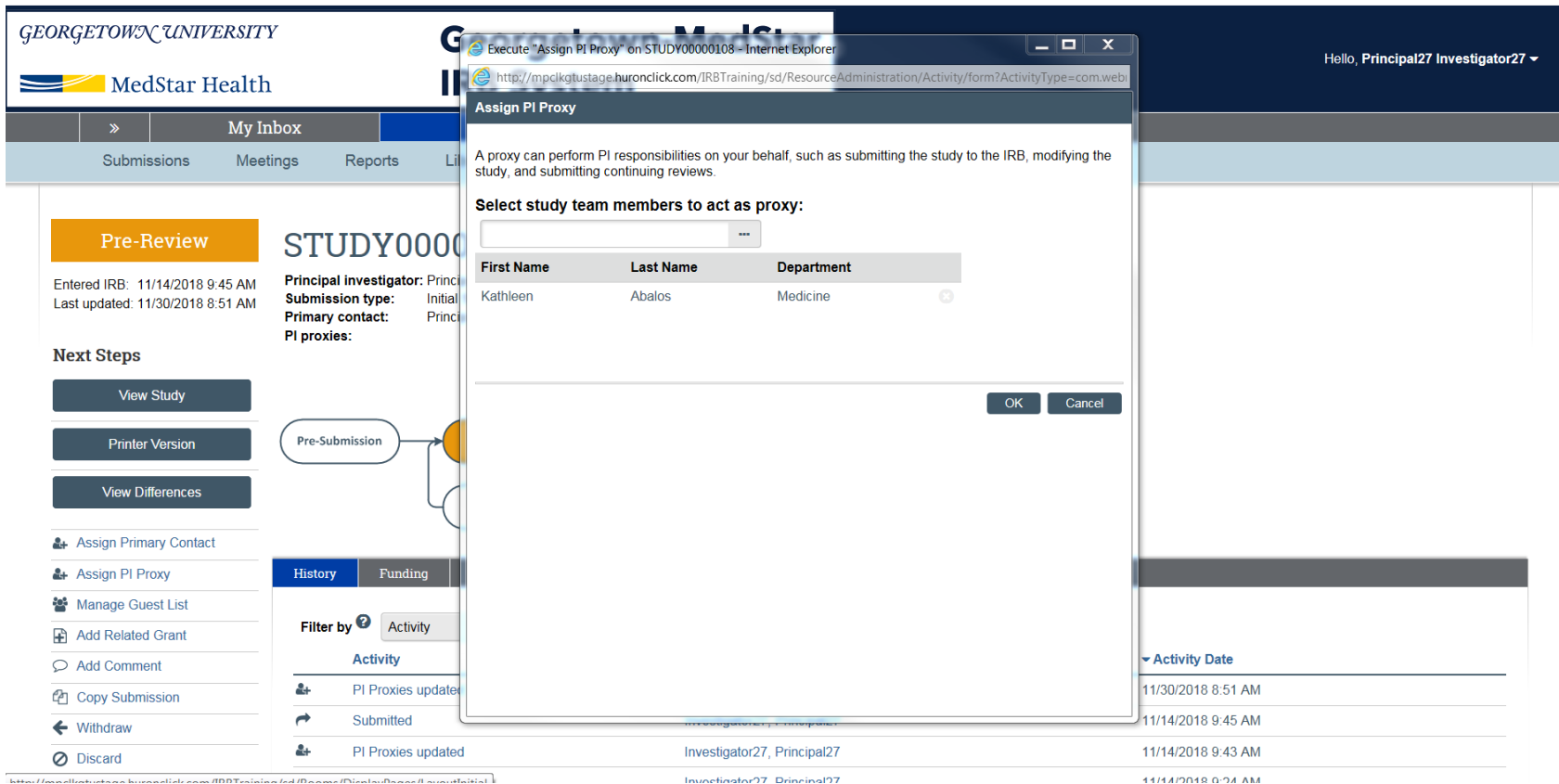
Activity	Activity Date
PI Proxies updated	11/30/2018 8:51 AM
Submitted	11/14/2018 9:45 AM
PI Proxies updated	11/14/2018 9:43 AM
	11/14/2018 9:24 AM

Investigator27, Principal27

Investigator27, Principal27

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The individual you selected in the previous window should now appear in the list of PI proxies. If that person is now listed, click OK.



The screenshot displays the Georgetown-MedStar IRB System interface. A modal dialog box titled "Assign PI Proxy" is open, overlaying the main application. The dialog box contains the following text:

Execute "Assign PI Proxy" on STUDY00000108 - Internet Explorer
 http://mpeclgtustage.huronclick.com/IRBTraining/sd/ResourceAdministration/Activity/form?ActivityType=com.web...

Assign PI Proxy

A proxy can perform PI responsibilities on your behalf, such as submitting the study to the IRB, modifying the study, and submitting continuing reviews.

Select study team members to act as proxy:

Search: [text input field]

First Name	Last Name	Department
Kathleen	Abalos	Medicine

OK Cancel

The background interface shows the "STUDY00000108" page. The left sidebar includes a "Pre-Review" section with "Entered IRB: 11/14/2018 9:45 AM" and "Last updated: 11/30/2018 8:51 AM". Below this is a "Next Steps" section with buttons for "View Study", "Printer Version", and "View Differences". A "Pre-Submission" button is also visible. The main content area shows the "Principal investigator: Principal" and "Submission type: Initial". The "Primary contact: Principal" and "PI proxies:" sections are also present. The bottom of the screen shows a "History" tab with a "Filter by" dropdown set to "Activity". The activity list includes "PI Proxies updated" and "Submitted" with dates and times.

Confirm that your PI Proxy assignment appears listed above the workflow map for the study.

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My Inbox

IRB

Submissions Meetings Reports Library Help Center

Pre-Review

Entered IRB: 11/14/2018 9:45 AM
Last updated: 11/30/2018 8:59 AM

Next Steps

View Study

Printer Version

View Differences

- Assign Primary Contact
- Assign PI Proxy
- Manage Guest List
- Add Related Grant
- Add Comment
- Copy Submission
- Withdraw
- Discard

STUDY00000108: Biofreedom Track

Principal investigator: Principal27 Investigator27
Submission type: Initial Study
Primary contact: Principal27 Investigator27
PI proxies: Kathleen Abalos

IRB office: MHRI IRB
Committee:
IRB coordinator:

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graph LR
    A([Pre-Submission]) --> B([Pre-Review])
    B --> C([IRB Review])
    C --> D([Post-Review])
    D --> E([Review Complete])
    B --> B1([Clarification Requested])
    B1 --> B
    C --> C1([Clarification Requested])
    C1 --> C
    D --> D1([Modifications Required])
    D1 --> D
    
```


History Funding Contacts Documents Reviews Snapshots Training

Filter by **Activity** Enter text to search for **Q** **+ Add Filter** **✕ Clear All**

Activity	Author	Activity Date
PI Proxies updated	Investigator27, Principal27	11/30/2018 8:59 AM
PI Proxies updated	Investigator27, Principal27	11/30/2018 8:51 AM
Submitted	Investigator27, Principal27	11/14/2018 9:45 AM

You should then be taken back to the modification's workspace. The orange study status bar on the left side of your screen should now say "Pre-Review." The Pre-Review bubble on the workflow map will be highlighted orange.

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My Inbox

IRB

Submissions

Meetings

Reports

Library

Help Center

Pre-Review

Entered IRB: 11/29/2018 6:31 PM
Last updated: 11/29/2018 6:31 PM

Principal investigator: Principal26 Investigator26
Submission type: Modification
Primary contact: System Administrator

IRB office: MHRI IRB
Committee:
IRB coordinator:
Regulatory authority: Pre-2018 Requirements

MOD00000033: Modification #2 for Study Test PI26 Study

Next Steps

View Modification/CR


Printer Version

View Differences

Add Comment

Withdraw

Discard



History

Contacts

Documents

Related RNIs

Snapshots

Training

Filter by [?] Activity ▾

Enter text to search for

Activity	Author	Activity Date
Submitted	Investigator26, Principal26	11/29/2018 6:31 PM

Congratulations!

You have successfully submitted a new study in the Georgetown-MedStar IRB System!

If you have any questions about the steps described, please contact the Office of Research Integrity at MHRI-ORISHelpDesk@medstar.net.