

Primary Contacts and PI Proxies – Quick Reference

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Important Terms

- **Primary Contact.** The person who will act as the study's main point of contact for communications with the IRB. When the RCS communicates a decision or requires action by the study staff, the primary contact receives notifications in addition to the principal investigator (PI) and PI proxy(ies). The Primary Contact may initiate submissions to the IRB (e.g., Modifications and Continuing Reviews) and edit submissions. However, the Primary Contact cannot submit on behalf of the PI unless they are also listed as a PI Proxy. *There can only be one primary contact listed on each study.*
- **PI Proxy(ies).** PI proxy(ies) may act on behalf of the Principal Investigator (PI) of the study. PI proxy(ies) may submit a study for initial review, modify the study, or submit for continuing review. Please note that the Principal Investigator is ultimately responsible for the conduct of the research, as well as reviewing and permitting changes to the research. While the system allows the PI to assign more than one proxy, ***it is highly recommended to have just one PI Proxy.*** Proxies must be listed as team members within the study. The PI Proxy should be well qualified, and act only based on direction from the PI. If a person should not be allowed to submit on behalf of the PI, but you want them to know about IRB communications, they should be assigned primary contact instead. Faculty Advisors must be PI Proxies for their student PIs.

General Information

- The Primary Contact is not required to be listed on the study. *However*, if the Primary Contact participates in human subjects research, they must also be listed as a [UO study team member](#).
- To be assigned as a PI Proxy, the individual must be listed as a [UO study team member](#).
- After initial approval, PI proxies can only be selected from individuals previously approved (i.e., if adding a study team member via a modification, that individual can only be selected to be a PI Proxy *after* the modification has been approved).
- Only the IRB Coordinator (RCS Staff) and the PI can assign/change PI Proxies.
- The Primary Contact and PI Proxies can be assigned/changed at any time and does not require a modification.

How to change the Primary Contact/PI Proxy:

- You must be in the parent study. If you are in a Modification or Continuing Review submission, click on the hyperlink to the parent study at the top of the workspace.

Next Steps

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[Create Modification/CR](#)

[Report New Information](#)

[Assign Primary Contact](#)

[Assign PI Proxy](#)

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- Choose "Assign Primary Contact" or "Assign PI Proxy" from the left menu on the study workspace. A pop-up window will appear.
- Select the individual you wish to be Primary Contact/PI Proxy. You can search by first or last name. The person you are adding must have a DuckID. If you have trouble finding the person, you can use % to help your search (e.g. %Smith%).
- Select "OK" at the bottom right side.