Adding PI Proxies in ERMS - Agreements

For help please email contracts@uthscsa.edu

1 First, on the General Information SmartForm, on question 6 Agreements Collaborators, add the person to be named proxy. Save your changes and exit to the Agreement Workspace.

2 Click on Assign PI Proxies. This will open a new window with a list of the people who are Agreement Collaborators

3 Tick the checkbox in front of the name of the person(s) you want to name as a Proxy and click okay.

4 You can add and remove proxies by clicking Assign PI Proxies whenever it is available in the list of Activities for that Status.