



Enterprise Research
Management System
(ERMS)

BULLETIN

August 31, 2023

ERMS-Agreements Module Tips and Tricks

PI Proxies – What are they, what can they do, and how are they selected?

ERMS- Agreements provides principal investigators many features to ease the administrative burden of agreements management. One of those features is the ability to appoint proxies to assume a variety of roles and responsibilities in the system on behalf of the PI. While proxies may not approve ancillary reviews on behalf of the PI, they can perform many tasks throughout the review process. A proxy can:

- Submit an agreement or amendment request
- Create ancillary reviews
- Respond to requests for clarification
- Manage access to add collaborators
- Manage relationships (allowing related agreements to be cross-referenced)

To assign a proxy, the PI must first name an individual as an “Agreement Collaborator” on the agreement or amendment request Smart Forms. The individual may then be assigned as a proxy for the agreement or amendment request.

Want more information?

Detailed instructions can be found [here](#) and a short demonstration video of this feature are available [here](#).

New Conflict of Interest Disclosure System to Replace iDisclose 6.0

Effective October 2023, a new Conflict of Interest disclosure system will replace iDisclose 6.0. The new COI solution is part of the integrated Enterprise Research Management System (ERMS) suite of applications.

The ERMS-COI module will improve the user experience and simplify the disclosure process for faculty and staff across UT Health San Antonio. In the new ERMS-COI module, you will be able to:

- Request permission to participate in outside activities
- Disclose outside activities, business relationships, and financial interests that have the potential to create a conflict of interest
- Track the review status of your disclosures

- Assign proxies to input disclosure details on your behalf

Please [join](#) us for a virtual VPR Town Hall [Thursday, September 7th at 1:00pm](#) to learn more about ERMS-COI.

Questions about the ERMS-COI module and the upcoming transition can be sent to COI@uthscsa.edu.

ERMS giving time back for mission-focused research activities.

Learn more at <https://www.uthscsa.edu/vpr/erms>.

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