This quick guide provides information about who receives system generated Click notifications and how to add individual(s) to receive the notifications (e.g., when clarification is requested, when a comment is added to the study, notice of IRB determinations such as exemptions and approvals, continuing review reminders).

By default, the Principal Investigator (PI) receives all system generated Click notifications. Action(s) must be taken to identify additional individuals to receive the system generated Click notifications; these actions are either “Assign Primary Contact” and/or “Assign PI Proxy.” The PI will continue to receive notifications, even if a Primary Contact and/or PI Proxy are designated.

WHO:

- Principal Investigators (PIs)
- Study Teams

WHEN:

- Adding or updating who should receive Click system generated notifications.

HOW:

Assign Primary Contact

1. Create a new study submission and identify the PI on the “Basic Information” SmartForm page.

NOTE:

- While any individual on the study team may create the study submission, only certain individuals may serve as PI on an IRB submission. See HRPP Manual Section 4-9, Designation as PI, for who can serve as PI on an IRB submission.
2. Identify key project personnel on the “Study Team Members” SmartForm page. Be sure to save this page if you intend to exit the submission. This will provide the study team with the ability to assign a Primary Contact.

Note:

- See HRPP Manual 4-10, Designation as Key Project Personnel on Non-Exempt IRB Projects for who must be listed on non-exempt IRB projects.

3. To designate the Primary Contact, the PI or a member of the study team logs into Click and navigates to the study submission’s workspace (if they were not the individual creating the study submission).
4. The individual selects “Assign Primary Contact.”

5. To select the primary contact, select the “…” button. This will then display users in the Click system to select. Select the primary contact and select OK.

**Note:**
- The list of individuals that displays to select the primary contact is not limited to the study team; it populates with all users in the Click system.
Quick Guide

How to Receive System Generated Click Notifications

6. Select “OK” to complete the “Assign Primary Contact” action.

![Assign Primary Contact](Image)

Note:
- Only one primary contact may be designated on a study.

**Update or Remove Primary Contact**

1. The “Assign Primary Contact” action can be taken at any point in the study. To do so, the PI or study team member would access the study workspace, select “Assign Primary Contact,” and select a new individual; this would update the Primary Contact.

2. To remove a Primary Contact and not assign another individual, select the “x” button to remove the individual and select “OK.”

![Assign Primary Contact](Image)

**NOTE:**
- Removing an individual as Primary Contact does not remove the individual from the study if listed; to remove an individual from the Study Team, a MODIFICATION must be submitted.
- The “Assign Primary Contact” activity is only available on the STUDY workspace; it is not available on a MODIFICATION or CONTINUING REVIEW workspace. The PI or study team member must navigate to the main STUDY workspace to perform the “Assign Primary Contact” activity.

**Assign PI Proxy(ies)**

1. PI Proxy(ies) also receive communications sent to the PI. See *Quick Guide: How to Designate, Update, or Remove a PI Proxy* for step by step instructions on how to designate PI Proxy(ies).