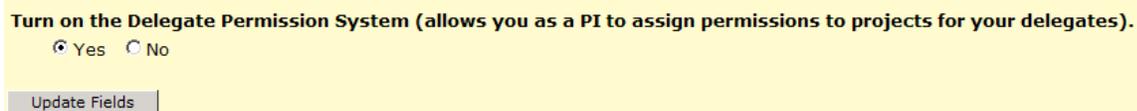# myIRB Delegate Permission System (DPS)

By default, when a delegate is added to act on behalf of the Principal Investigator (PI) in myIRB, the delegate has access to all of the PI's projects and can submit forms, including new projects, under the PI's name. Delegates will also be copied on all notices for those projects. The Delegate Permission System (released on 3/11/2011) allows PIs to specify which projects a delegate can access and be notified about. The following information explains how to activate the DPS and how to edit the delegate settings.

Important things to consider before activating the delegate system:

- *When the DPS is turned on, it requires ongoing maintenance by the PI. By default myIRB grants all delegates the ability to access all of a PI's studies and create drafts on a PI's behalf. The DPS works by allowing the PI to remove permissions. This means the PI will need to login and update the delegate settings each time…*
  - *a new project is created*
    -and/or-
  - *a new delegate is added.*

- *Once a delegate's permissions have been removed from a project she or he will not be able to draft __any__ forms for that project. The delegate may or may not be able to see the project listed in the PI's inbox depending on the setting chosen by the PI on the Update my delegates page.*

How a PI can activate the Delegate Permission System

1. The PI should login to myIRB as usual.
   Login instructions are available at https://hrpo.wustl.edu/faq/how-do-i-access-myirb-and-begin-filling-out-a-new-project-application/

2. Once inside myIRB, select Personalize (from the red, top menu).

3. Click Update my Profile.

4. Towards the bottom of the profile page, look for "Turn on the Delegate Permission System (allows you as a PI to assign permissions to projects for your delegates)." Choose Yes then click Update Fields.

How PIs can edit the delegate settings

1. In the red menu bar, click on Personalize.

2. Click on the link to Update my Delegates.

3. The upper region of this page allows you to add new delegates and choose how your inbox should appear when it's opened by a delegate.

4. To <u>restrict access to all projects by all delegates</u>, clear the check mark in the box beside "Check/Uncheck all permissions for all delegates (see field circled in blue below).

5. To <u>restrict specific delegates from accessing all of your projects</u>, go to that individual's name on the delegate list and clear the check mark in the box beside "Projects" (see field circled in red below) or scroll to the right and click on the remove link to remove the person as a delegate.

6. To <u>specify which projects a delegate can access</u>, go to that individual's name on the delegate list and clear the check mark that appears in the box beside the projects you do not want the person to access (see fields circled in green).

7. Click on the Save Permission Information.