Principal Investigator Manual – Add a Proxy
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Instructions regarding Proxy assignments and procedures:
A Principal Investigator can select another Principal Investigator or administrative personnel to review an effort report that is certified, but a proxy can only be granted by Principal Investigators that meet the following conditions:

- Proxy has a direct knowledge of the individual’s effort or worked performed on the grant
  - Proxy should work in close proximity of individual on a daily basis in order to support the claim that the Proxy is in direct knowledge of the individual’s effort
  - Proxy should have a working knowledge of the grant expenditures and personnel assigned to tasks in the grant / fund
- Review of the Effort Reporting Procedure - Proxy Identification
- Completion of the Assignment of Proxy form
- Submission of the Assignment of Proxy form and approval by Effort Certification Administration

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A – Logging into the Effort Reporting Certification System Banner Self-Service GUI

A1) Logon onto Banner Self-Service Module

A2) Click on “Employee” tab
A3) Click on “Effort Reporting”
B – Principal Investigator Steps:

B1) In the Effort Certification Homepage, there is a link to identify a Proxy:

a) Click on the link titled: Proxy or Superuser:

b) Select “Add Proxy”: 
c) A box will appear that allows you to select the Proxy

d) Use the ellipsis to obtain a list of Rowan University employee

e) After clicking on the ellipsis, go to the employee and click on that employee, and that employee’s name now appears in the box

f) Click “Save”
C – Administrator/Proxy Steps:

C1) Follow steps A1 through A3 above, then continue on to step C2

C2) In the Effort Certification Homepage, there is a link to identify a Proxy:

a) Click on the link titled: Proxy or Superuser:

b) Click on the box next to the text “Act as Proxy For”:

c) The Principal Investigator (PI) must complete steps listed above in section B prior to this step, then this box should include an option to select the PI and act as a Proxy

d) Select the PI’s name and then click Save on the screen

e) Use the PI Certifier and Review Manual – Abridged Version to review the steps to bring up all the effort reports associated with the PI’s grants / funds