Instructions for Approving a Proxy Request

1. Run the query in PeopleSoft to identify all those who are requesting proxy access to certify effort.
2. This should be done once in the morning (around 9am) and once in the afternoon (around 2pm).

You can approve a proxy request for the following:
1. The individual is a department chair, dean, or center director
2. The individual is the employee’s direct supervisor
3. The individual is the lab manager of where the research is being conducted for any staff EXCEPT for faculty.
4. The effort coordinator can certify for any Clinical Faculty ONLY with no grant activity.

The following proxy requests should not be approved:
1. The proxy request is the effort coordinator (unless for clinical faculty see note above)
2. The proxy requested does not have suitable means of verification
   a. Not a supervisor or has no contact with the employee to be able to answer questions if audited.

An email must be sent to departments when a proxy is not approved. They would not get any notification if the request is denied from the system. This is a common courtesy to our customers. To deny the request, verify that all boxes are checked for “Inactive” and “Reviewed” and it will no longer show on the query results.