

Proposal Screens – Create & Setup Questions

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Created: 10-15-2023

Reviewed: 12-14-2023

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General Notes

This document is intended to describe the initial steps in creating a proposal. Capitalized words indicate an object in InfoEd. Italicized words indicate a field or parameter in that object or additional reference documentation. Bold is used for emphasis in lists.

Common Objects or Terms in InfoEd

User: A person who can log in and use InfoEd

Portal: The landing page that is first seen after login, a.k.a. the Home page

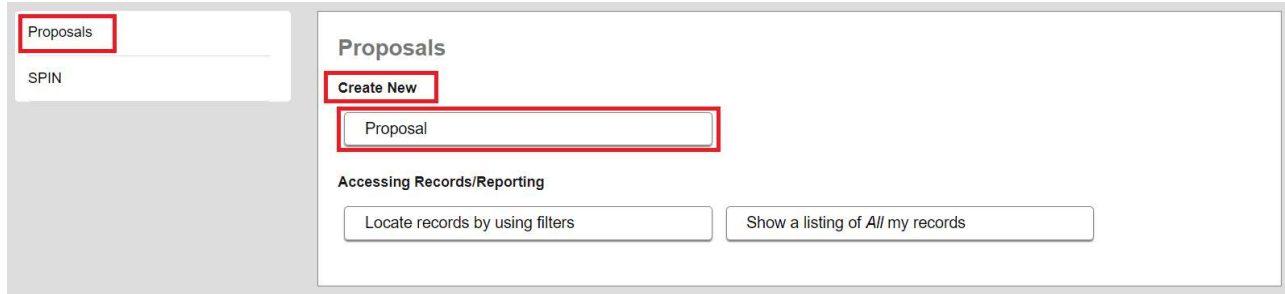
Record: A generic term for an object in the system such as a Proposal or a COI Disclosure

S2S: An abbreviation for system-to-system submissions when a proposal can be sent directly from InfoEd to the sponsor

Widget: A generic term for the white text boxes on the portal screen (a wide variety of widgets are available in InfoEd with additional widgets developed as needed)

Creating a New Proposal

Getting to the Create Screen



1. From the left menu of the Portal, click “Proposals.”
2. Under the Create New section, click the “Proposal” button.

Create New Proposal Screen

The create screen has eight required fields. Once all fields are completed, click “Create Proposal” in the lower right corner to create a proposal record and move on to the Setup Questions screen. Note: A grants coordinator will only be assigned AFTER the Setup Questions screen has been completed.

A screenshot of the 'Create New Proposal' form. The form has a dark blue header with the title 'Create New Proposal'. Below the header are several sections:

- 'Please type and select the PI Name' with a text box containing 'PI, Demo'.
- 'Please select "New" proposal or "Copy from Existing"' with a dropdown menu showing 'Create a New Proposal' and 'Copy From Existing Proposal'.
- 'Proposal Type' with a dropdown menu showing 'New'.
- 'Please select from Grants.gov or SPIN opportunities or choose "Setup Proposal Manually" to select a specific sponsor (including URFO programs).' with a dropdown menu showing 'Select from Grants.Gov Opportunities', a text box with 'S25', a checked checkbox, and a 'Search' button.
- A note: 'Type URFO to see a selection of the RSP internal funding opportunities. If you cannot locate the sponsor you need, please select "To Be Determined" from the sponsor list, then contact rsp.admin@utoledo.edu with sponsor details including a sponsor name, address, URL, a copy of the opportunity announcement and/or contact person for the program or opportunity.'
- 'Please enter the proposed project title' with a large text area.
- 'Please Enter the Projected Project Start / End Dates. Note: Calendar display begins on MONDAY.' with 'Start:' and 'End:' date pickers.
- 'Number of Project Periods' with a dropdown menu showing '1'.

A 'Create Proposal' button is located at the bottom right of the form.

PI Name: This field defaults to the logged in user. If the logged in user is not the PI, begin typing the PI’s name in the text box and select the appropriate person from the list.

Create a New Proposal or Copy from Existing: Select “Create a New Proposal” to create a new proposal that is empty of any data. Select “Copy From Existing Proposal” to copy a proposal previously created in InfoEd. When copying a previous proposal, enter the proposal number in the pop-up and click Select. To use filters to locate a desired record, click Browse for Proposals.

Funding Selection: Opportunities can come from three sources.

- *Select from Grants.gov Opportunities (default):* If the exact or partial grants.gov opportunity identifier is known, type the partial or full identifier into the text box and click Search to bring up a list of matching opportunities. The text box search can also be used to find matching text from the opportunity title, funding agency, or the CFDA number.

| Opportunity Number | CFDA Number | Competition ID | Competition Title | PackageID | S2S | Opening Date | Agency | Title |
|-------------------------------------|-------------|----------------|-------------------|-------------|-------------------------------------|--------------|-------------------------------|--|
| PA-FN-R21 Select | 93.855 | FORMS-F | | PKG00055331 | <input checked="" type="checkbox"/> | 09-Oct-2019 | National Institutes of Health | G.g. Training and NIH Ext-UAT FOA (R21-Clinical Trial Not Allowed) |

- **Select from all SPIN Opportunities:** Use a SPIN search to find the opportunity.
- **Setup Proposal Manually:** This option is used for non-Grants.gov or SPIN opportunities such as industry sponsored opportunities or internal (URFO) programs. In this case, the text box becomes a search for a sponsor entity in InfoEd. Begin typing the sponsor name and select from the list as it filters
Note: If the sponsor you are looking for is not available, you can select TBD as a placeholder and contact InfoEd@utoledo.edu to request the sponsor be added.

Proposal Type: Select the type of proposal record.

- **New:** an application not previously submitted to the sponsor
- **Renewal:** an application requesting additional funding for a period subsequent to that provided by a current award. Renewal applications compete for funds with all other peer reviewed applications and must be as fully developed as if the applicant is applying for the first time.
- **Resubmission:** an application that was previously submitted but not funded and is being resubmitted for new consideration
- **Revision:** defined in Federal wide SF424 (R&R) as an application that proposes a change in 1) the Federal Government's financial obligations or contingent liability from an existing obligation, or 2) any other change in the terms and conditions of the existing award.
- **Supplement:** new funding requested for an existing grant. May be a competitive or administrative supplement.

Project Title: Enter the title of the project in the text area. It can be a working title to start but should be easily identifiable. Changes to the title can be made if needed.

Project Start/End Dates: Enter the start and end date for proposals by typing or selecting from the calendar.

Note: Typed dates must be formatted in one of the following ways: 03/09/74, 03/09/1974, 030974, 03091974, or 09-Mar-1974.

Number of Project Periods: The system will calculate the number of budget periods based on the start and end dates. Number of periods can be adjusted (if needed) before moving on.

Setup Questions Screen

After clicking "Create Proposal," the system generates a list of "Setup Questions" based on the opportunity selected.

Note: Depending on the opportunity selected, not all the below questions will appear. The proposal record number is also generated and appears in the upper right corner of the screen as P-XXXXXX. The proposal number should be referenced in communications with ORSP staff, including Grants Coordinators.

Submission Mechanism/Form Information

Proposal Sponsor: Reflects the sponsor associated with the opportunity selected on the "Create Proposal" screen. If the sponsor is changed, all questions on the Setup Questions tab will be reset.

Is this a Flow Through Project?: Answer "Yes" if UT is a subcontractor on another applicant's proposal to this program. You will be asked to find the flow through sponsor.

Temporary Note: *These type of proposals (where UT is a subcontractor) will NOT be done though InFoEd until Spring 2024.*

Please Select a Submission Mechanism/Screen Template: This question changes the application template, which is used to determine screens and submission requirements. Do not change this unless under the direction of a grants coordinator or system admin.

Is this a US federal sponsored project: Select "Yes" if the originating sponsor is a federal entity.

Will this be a proposal to PHS, NIH, or one of the branches of NIH?: Is the proposal going to the Public Health Service, National Institutes of Health or one of the specific agencies under the National Institutes of Health (e.g National Institute of Mental Health)

Has your sponsor given a specific reference for this proposal?: Select “Yes” when there is an identifier for the opportunity, and select “No” when there is not.

Is this an un-solicited application?: Answer “Yes” if this is an investigator-initiated proposal and not a solicitation for an existing opportunity.

Opportunity Number: Reflects the opportunity selected on the “Create Proposal” screen.

- **Get Opportunity Number:** Opens a pop-up with information related to the funding opportunity. Allows for changes to Sponsor, Proposal Type, Opportunity Number, and Flow Through Project.
- **Spin Opportunity Information:** Opens a SPIN document about the opportunity
- **Grants.gov Opportunity Instructions:** Opens a pop-up window with instructions from Grants.gov

[Grants.Gov Submission Information \(for System-to-System Submissions\)](#)

This section provides detailed information about the opportunity and submission, including required and optional forms that will be sent via S2S.

[Validations List](#)

By default, the proposal applies validation checks before submission.

The *Mechanism Opt In/Out* link can be used to remove one or more of the applied validations. Consult with grants coordinator or system admin before making changes to this list.

[Forms List](#)

Lists the forms included in the submission package. Depending on the schema for the opportunity, some forms are required and included by default and other forms are optional.

[Deadline Information](#)

Grant applications and associated documents are due to the sponsor on this date.

Mechanism: Indicates the submission method. For grants.gov applications this will say System to System. For non-S2S sponsors, this may be another electronic portal or email or other method.

Note: Typed dates must be formatted in one of the following ways: 03/09/74, 03/09/1974, 030974, 03091974, or 09-Mar-1974. Times must be typed with the AM/PM designated with a space after the time, e.g. 5:00 PM, or can be entered in military time, e.g. 17:00.

[General Proposal Properties](#)

Human Subjects: Asks whether the proposal involves the use of human subjects.

Laboratory Animals: Asks whether proposal involves the use of animals.

Multiple PI: Asks whether proposal involves multiple principal investigators.

Training Grant: Asks whether proposal is a training grant.

Associated Departments: Lists the department(s) associated with the proposal/submission. By default, the PI’s department is listed. One can add departments by clicking “Add” and selecting the appropriate department. When multiple departments are selected, one must be designated as Primary. This may be needed if a PI has a formal appointment in more than one department.

PI Departments: Lists departments associated with the PI of the proposal. By default, the PI’s department is listed. One can add departments by clicking “Add” and selecting the appropriate department. When multiple departments are selected, one must be designated as Primary. This may be needed if a PI has a formal appointment in more than one department.

Link to existing proposal: When a proposal is of a type that requires a parent record, such as a supplement or revision, this question provides the mechanism to connect the created record to its parent. Click “Look Up” to get a list of the eligible proposals to link to. Click the proposal number to select and bring back the parent proposal.

[PHS/NIH \(for PHS/NIH Submissions using System-to-System\)](#)

Will this proposal involve human embryonic stem cells?: Asks whether the proposal involves human embryonic stem cells.

Is this proposal funding a Clinical Trial?: Asks whether the proposal involves clinical trials.

Is this proposal an NIH-defined Phase III Clinical Trial?: Asks whether the proposal is a Phase III Clinical Trial specifically.

Will this proposal be using a Modular budget?: Asks whether the proposal will be using NIH modular budget.

Will this proposal involve the Cumulative Inclusion Report?: When the proposal is a clinical trial, you may need to answer this question “yes.”

[Budget Setup Information](#)

Select the Program Type: Defines the Facilities & Administrative (F&A) Cost Rates depending on the On-Campus and Off-Campus activities.

- HSC Organized Research
- Main Campus Organized Research
- HSC Other Sponsored Activities
- Main Campus Other Sponsored Activities
- Instruction
- Internal Funding (URFO)

The majority of the research will be conducted: Indicates whether research activities are primarily being held on or off campus, which changes the allowed F&A rate.

[Save and Continue](#)

When the Setup Questions are complete, click “Save & Continue” in the bottom right corner to complete setup and reveal the opportunity and sponsor specific screens.