Help Guide – How to Submit Your URFO Letter of Intent

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Logging In To InfoEd

URL: infoed.utoledo.edu
This will take you to the tower login page. Log in using your normal UTAD username and password.

To Find an LOI Proposal You Have Already Started

Depending on how many proposals and other types of records you have in InfoEd, there are several options for finding your records.

Option 1: Locate My Records

1. Simply click "Locate My Records" from the top menu of the portal. This will bring back all the records on which you are the Record Owner. In the context of Proposals, the Record Owner is always the PI. If you are not the PI, or there is an overwhelming number of records in this list, you can use option 2.

Option 2: Locate Records

1. Click "Locate Records" in the top menu of the portal. This will bring up a smaller search window with attributes you can use to limit the results of your search.
2. Select "Proposals" to limit your search to just proposal records. This will bring up additional attributes by which you can further limit the results.
3. To find an URFO application, it is easiest to search by "Record Primary Sponsor" so click that box.
4. Type "URFO" in the resulting text box and select "URFO – LOI for Major Programs – Due Oct" from the list.
5. Click the "Search" button.

Option 3: Quick Find

1. If you remember your record number or part of your title, you can type it into the Quick Find box in the blue menu bar and hit enter.

Results List

After searching using any of the above options you will see a list of the matching results in a list in the middle of the portal.

1. In the results list, click the record number link in the first column. This will reveal a "flyout menu."
2. From the flyout menu, hover over "Proposal Development", this will reveal another flyout menu.
3. Click "Edit" to open the record for editing or "View" to simply look at the record.

To Start a New LOI Proposal

1. In the Left Menu, click "Proposals"
2. In the resulting content pane, under the heading "Create New", click the "Proposal" button.
3. A new window will pop up with the required fields for starting a proposal.
4. PI Name: Defaults to the logged in user. For LOI proposals, the project PI needs to be the creator of the record.
5. Leave the next field defaulted to "Create a New Proposal."
6. Leave the Proposal Type field defaulted to "New."
7. In the next drop down, select "Setup Proposal Manually."
8. In the text box underneath, type URFO. You will be presented with 3 options. Select "URFO – LOI for Major Programs – Due Oct."
9. Next type the proposal title in the box under the instructions "Please enter the proposed project title." This will become the title of the record in InfoEd. You will have the opportunity to update the title later.
10. Enter a Start and End Date. For the LOI itself these dates do not matter. You can select dates that reflect the project dates if you are chosen to submit a full proposal, or you can just select any span of time that is convenient.
11. Number of Project Periods will default based on how many years are in the span between start and end date. It does not matter for the LOI process.
12. Click the "Create Proposal" button at the bottom right of the window.

LOI Proposal Components

1. Setup Questions – This is a page with instructions for completing your LOI Proposal. There is nothing to enter on this page, it is simply there for reference.
2. Personnel – This screen allows you to add the other researchers who will be engaged in the project if you are selected to submit a full proposal. Note that the IRIA program has specific requirements regarding the number of people and the number of departments involved.
   To add another person to your proposal:
   a. Leave "Proposal Element" drop down defaulted to "Prime."
   b. Leave the "Personnel Type" defaulted to "Key."
   c. Begin typing the last or first name of the person you wish to add. The selection list will continue to narrow as you type more letters.
      i. If you cannot find the person you are looking for, contact infoed@utoledo.edu. It is possible they do not yet have a profile in InfoEd.
   d. Select the person you wish to add from the list.
   e. Choose the role that most closely describes their relationship to the future proposal.
   f. When you have finished adding people, click the Complete checkbox in the upper right corner.
3. Letter of Intent – This screen is an eForm and has 3-4 questions on it to complete.
   a. Review the title brought in from the Create Screen. It can be changed here if desired.
   b. Choose the Major Program you are interested in applying to.
   c. Confirm that you are a full time tenured or tenure track faculty member at UToledo.
   d. Upload your Project Description file.
      i. Click the "upload" icon which will open a smaller file upload window.
      ii. Click the "Choose file" button to open the file search.
      iii. Navigate to the file and select it.
      iv. Click "Open" in the file search.
      v. Click "Upload" in the upper right corner of the file upload window.
      vi. The file will now display along with the upload time in the eForm.
   e. When you have finished the eForm, click the "Complete" checkbox in the upper right corner of the eForm. The eForm will warn you if you have left any required questions blank.

Important Pause: Do not proceed to the Submit Screen until you have completed all three previous screens. Once you submit to route for the review, you will NOT be able to edit your proposal.

4. Submit for Review – This screen has 3 sections. Because the LOI is a very simple proposal, the first section is unnecessary, and the page automatically places you on the second section entitled "Assemble Application."
    a. Click the "Build" button to generate a single document from the eForm and the attached project description. You will be automatically sent to the third section.
    b. Leave the Pre-Review Route to the defaulted "URFO Major Programs LOI Route" and click the "Submit" button.
    c. A smaller routing window will pop up. You can review the steps and personnel that will be involved with the review here. In the case of an LOI, the route only involves an administrative review before being sent to the committee for decision.
    d. Click the "Submit" button in the smaller window.

Following your Proposal Through the Review Process

You can use the Proposal Development Record to track the progress of your proposal through the route. On the submit for review screen you can see the currently active route in progress in the box label "Active Routing Progress". If the proposal has been in route before and was returned for revisions, you can see the full route history by clicking the yellow "scroll" icon.

Upon submission to route, your proposal will go directly to administrative review. The status of your record will become "URFO – Endorsed, In Administrative Review". If your proposal does not comply with program guidelines but can be corrected and there is still time prior to the deadline, the administrative reviewer will return the proposal to you for editing with comments and the status will return to "Initiated in PD – GC Unassigned."

If the proposal fails administrative review in way that is not correctable (e.g., the PI is ineligible) or if the deadline has passed, the administrative reviewer will put the proposal in a status of "URFO – Failed Administrative Review." This is a final status and you will not be able to edit the proposal again, but it will be available to you in the system in perpetuity.

If the proposal passes administrative review, the assembled application will be sent on for committee review. The status of your proposal will become "URFO – In Committee Review."

Subcommittees of the research council review all LOI proposals and determine which proposals to invite to apply to the selected major program in January. LOI decisions are made in November.

If your proposal is selected to apply for the major program, the status will be updated to "URFO – LOI Approved for Full Proposal" and you will receive an email informing you of your selection and next steps.

If your proposal is not selected to apply for the major program, the status will be updated to "URFO – Proposal Declined." You will receive a communication from the URFO team regarding the decision.