

To: Deans, Director and Department Chairs with Sponsored Project Proposal Approval Responsibilities  
 From: Jennifer Gagnon, Associate Vice President of Research Administration  
 Date: October 10, 2014  
 Re: New Delegation Features in InfoEd for Proposal Routing and Approvals

I am writing to let you know about a new delegation feature in InfoEd that will be useful in the proposal review process.

### **For Deans, Director, Department Chairs**

Deans, Directors and Department Chairs may now assign delegates to help with proposal review and approvals.

1. Delegates can be assigned to automatically receive a carbon copy of the proposal review/approval emails that are sent to Deans, Directors and Department Chairs.
2. Delegates can also be given authority to approve proposals on behalf of the Deans, Directors and Department Chairs.

With the old delegation features, delegates received automatic FYI emails and their names appeared in the route, which created some slowness within the system and confusion about roles. With this new feature, we have been able to preserve the notifications while eliminating the names from the route.

For Deans, Directors and Department Chairs, there is no need to adjust your delegate selections, unless you wish to make a change to current assignments.

### **For Investigators**

Investigators may also assign delegates to help with proposal development and document uploads. This is not a new feature, but is now more granular in that an Investigator can now assign a delegate for to a specific InfoEd module and with specific rights.

For example, a delegate can be assigned to the Proposal Development system but not to the Proposal Tracking System. This would allow the delegate to help with proposal uploads and forms, but would not allow the delegate access to proposal tracking history.

For Investigators, there is no need to adjust your delegate selections, unless you wish to make a change to current assignments.

If you wish to change delegates for proposal routing

1. Open the Delegation page on the SPA/InfoEd web site at <https://www.uvm.edu/~infoed/?Page=delegates.html>
2. Click the "Delegates – proposal routing" link to see routing delegates for Deans, Directors and Department Chairs
3. Determine who (if anyone) should receive a carbon copy on the proposal routing/approval emails you receive.
4. Decide who (if anyone) should have "signing authority" to review and approve proposals on your behalf as Dean, Director of Department Chair.
5. Contact Catherine.Ruley@uvm.edu or at 656-5560 in SPA for help updating your delegate list and delegate options.
6. Or, follow the instructions on the Delegation page to make those selections yourself. <https://www.uvm.edu/~infoed/?Page=delegates.html>

### **The Review Dashboard "FYI Steps" have been eliminated**

SPA has removed the below list of "FYI" steps which were previously "hard coded" into the route. Administrators can now be informed via the delegation features described above.

Step Name	Person	Action
SPA Initial Review	Proposal, Research Administrator	Approval Required
Multi Principal Investigators	Proposal, PI	Approval Required
Gund Institute Program Step	Ricketts, Taylor	Approval Required
Anesthesiology - FYI Step	Dutra, Kellie	No Action Required - Notification Only
Biochemistry - FYI Step	Green-Putnam, Yvonne	No Action Required - Notification Only
CDCC - FYI Step	Ransaul, Stephen	No Action Required - Notification Only
Medicine - FYI step	Carney, Bridget	No Action Required - Notification Only
	Gagnon, Eric	No Action Required - Notification Only
Neuro Science - FYI Step	Fay, Deborah	No Action Required - Notification Only
	Bossick, Sandra	No Action Required - Notification Only
	Miller, Daniel	No Action Required - Notification Only
	Holmes, Gregory	No Action Required - Notification Only
	Stetson, Joanne	No Action Required - Notification Only
Med Biostatistics - FYI Step	Ledoux, Suzanne	No Action Required - Notification Only
OBGYN - FYI Step	Gross, Carol	No Action Required - Notification Only
Pathology - FYI Step	Richardson, Dawn	No Action Required - Notification Only
Pediatrics - FYI Step	Victory, Susan	No Action Required - Notification Only
Psychiatry - FYI Step	Briggs, Glen	No Action Required - Notification Only
Rehab Movement FYI Step	Baldwin, Patricia	No Action Required - Notification Only
Radiology - FYI step	Ellingsworth, Linda	No Action Required - Notification Only
Surgery - FYI Step	Paris, Julie	No Action Required - Notification Only
	Russell, Sheila	No Action Required - Notification Only
Transp Rarch Ctr - FYI Step	Leopold, Jacob	No Action Required - Notification Only
VCC - FYI Step	Cote, Brooke	No Action Required - Notification Only
RSENR FYI Step	Feenan, Rose	No Action Required - Notification Only
Dept Chair Review	Proposal, PI Dept Head	Approval Required
	Proposal, Record Dept - Dept Head	Approval Required
	Proposal, Co-Inv Dept Head	Approval Required
CEMS - FYI Step	Ursiny, Monika	No Action Required - Notification Only
	Fouche, Moncarm Anthony	No Action Required - Notification Only
CALS - FYI Step	Fanus, Richard	No Action Required - Notification Only
COM - FYI Step	Cote, Brian	No Action Required - Notification Only
	Randall, Mauris	No Action Required - Notification Only
EXT - FYI Step	Trono, Diane	No Action Required - Notification Only
	Lantagne, Douglas	No Action Required - Notification Only
LIR - FYI Step	Gordon, Sarah	No Action Required - Notification Only
VP Research - FYI Step A	Harvey, Daniel	No Action Required - Notification Only
	Burkins, Melody	No Action Required - Notification Only
VP Research - FYI Step B	Burkins, Melody	No Action Required - Notification Only
	Harvey, Daniel	No Action Required - Notification Only
Dean Review	Proposal, PI Direct Parent Dept - Dept Head	Approval Required
	Proposal, Record Direct Parent Dept - Dept Head	Approval Required
	Proposal, Co-Inv Direct Parent Dept - Dept Head	Approval Required
COM HMG to CALS Dean	Vogelmann, Thomas	Approval Required
	Fanus, Richard	No Action Required - Notification Only
SPA Final Approval	Proposal, Research Administrator	Approval Required