

Start a New Proposal *(not NIH system to system)*

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Start a New Proposal *(not NIH system to system)*

Get Started

1. Contact SPA Research Administrator

SPA recommends you contact your assigned SPA Research Administrator at least four (4) weeks ahead of your sponsor deadline.

SPA Research Administrator - Departmental Assignments

http://www.uvm.edu/spa/?Page=contactus_bydepartmentassignments.html&SM=contact_submenu.html

2. SPA Research Administrator Services

- Interpret the sponsor guidelines
- Provide information for some of the application pages
- Prepare the SPA Budget Worksheet (excel document)
- Upload the sponsor guidelines to InfoEd (if there are any)
- Convert final version of SPA Budget Worksheet to pdf format and upload to InfoEd
- Preliminary review and approval of proposal at the start of the route
- Final review and approval of final version of proposal at end of the route
- Obtain UVM institutional approval signature

3. SPA InfoEd Support Team Services

- How to upload your proposal document to InfoEd
- How to complete the on-line Routing Form
- How to electronically route the proposal
- Provide help and training for InfoEd Proposal Development and Proposal Tracking systems

4. SPA Web Site

- Submit Proposal steps can be located on SPA web site

The screenshot shows the SPA website interface. At the top, there is a navigation bar with 'APPLY', 'SEARCH', and 'MYUVM' buttons. Below this is the University of Vermont logo and the URL 'www.uvm.edu/spa'. The main content area is titled 'Sponsored Project Administration - SPA' and includes a 'SPA A-to-Z topics' link. A red arrow points to the 'Submit Proposal' link in the left-hand navigation menu. Another red arrow points to the 'InfoEd Login' link in the 'Logins' section of the main content area. The page also features sections for 'Research at UVM', 'UVM Fact Sheet', and 'News'.

Start a New Proposal *(not NIH system to system)*

InfoEd Version 15 Upgrade - Three New Features

UVM's InfoEd system was upgraded to Version 15 in June, 2017. This upgrade provide three new features that will help to reduce redundancy and streamline the proposal development and submission process.

1. Investigators can start their own proposal records in InfoEd

Principal Investigators and Department Administrators can now start their own proposal records in InfoEd.

SPA expects that most Principal Investigators and Department Administrators will choose to start their own proposal records.

However, this is not a requirement.

Feel free to ask your SPA Research Administrator to start the proposal, if that is easier.

Once a new proposal is started, the SPA Research Administrator will contact the person who started the new proposal record to plan and coordinate the proposal development and submission process.

2. The SPA Routing Form will become an electronic form within InfoEd

The SPA Routing Form is no longer part of the excel Routing Packet

It is now an electronic form embedded within InfoEd.

3. NIH Pre-Submission Validations from NIH eRA Commons

This upgrade will provide a new pre-validation feature for NIH proposals which will allow us to “pre-test” the submission before we submit the final proposal to the NIH eRA Commons.

This will help us to identify and eliminate any potential errors or warnings before the proposal is submitted to the NIH eRA Commons.

No training is required for PIs and DAs as this step will be performed the SPA RA at time of proposal submission.

What Does Not Change?

SPA Research Administrators will continue to provide their usual services for their assigned units, and will continue to work closely with Investigators in the budget preparation process using the excel Budget Worksheet

Chairs and Deans will continue to review and approve proposals in Review Dashboard. The process remains unchanged.

Start a New Proposal *(not NIH system to system)*

Assemble your Proposal Information

Before creating a proposal record in InfoEd, you should have ready some key pieces of information about your project.

This information does not need to be final.

After creating the proposal, you may continue to make changes until you are ready to submit.

To start your proposal in InfoEd, you must provide the following details:

Principal Investigator

Proposal Department

Proposal Center/Program (if applicable)

Proposal Type: New Proposal or Competitive Renewal

Sponsor Name

Originating Sponsor Name - If your proposal is a flow-through project, you need the name of the originating sponsor.

Project Title

Project Start and End Dates

Submission Deadline

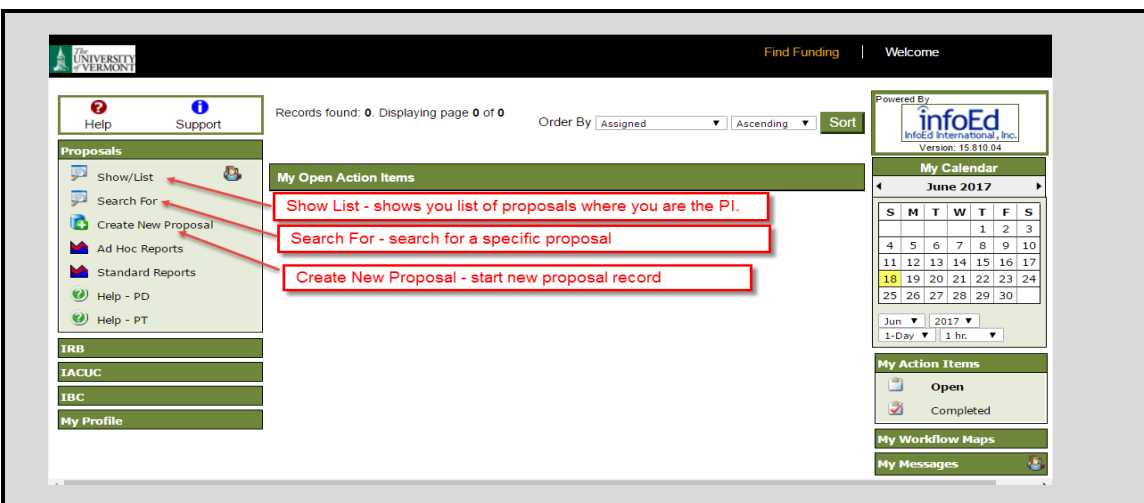
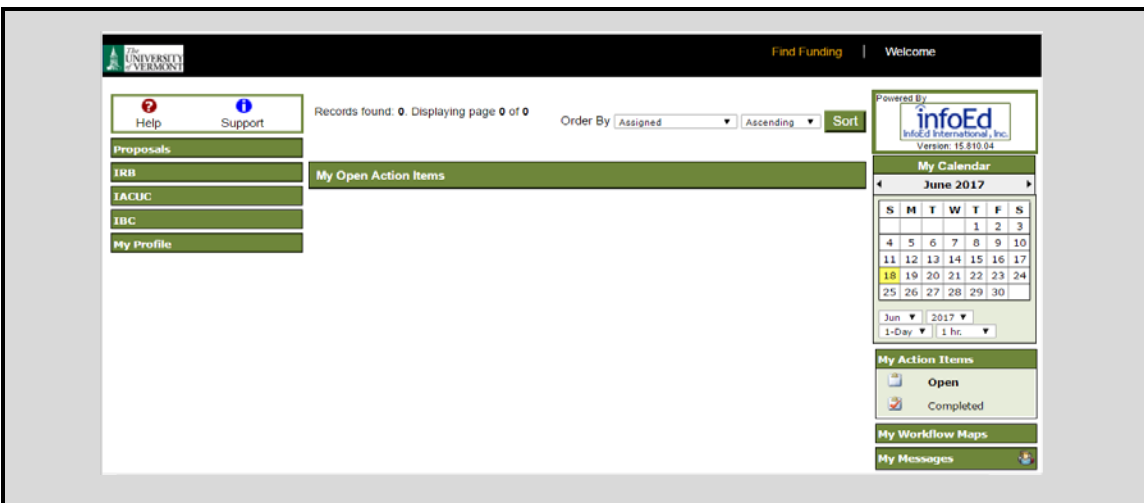
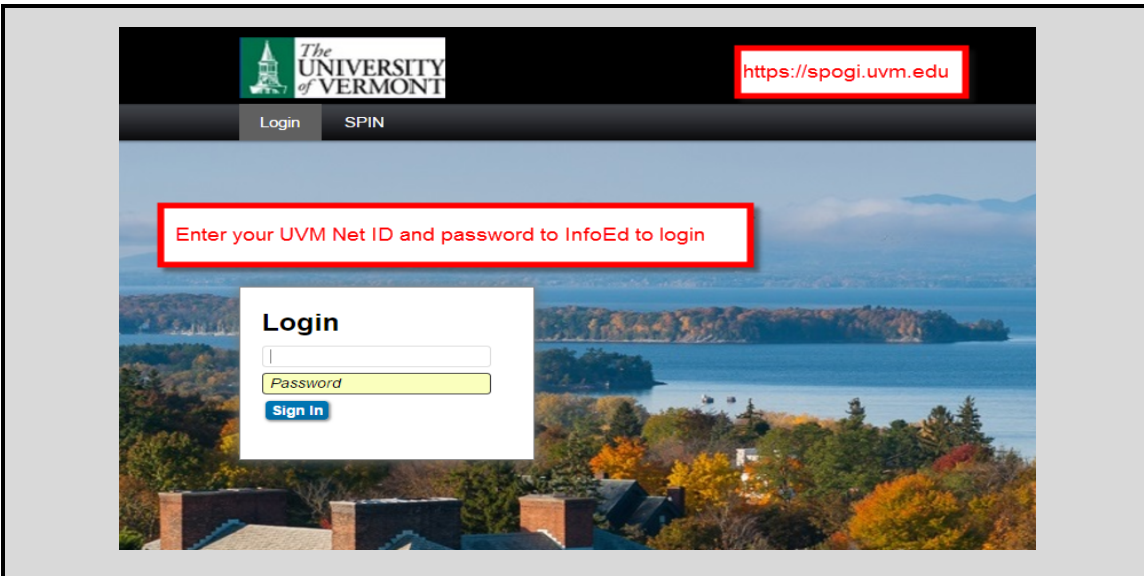
F&A Rate Type (Research on Campus, for instance)

If you have preliminary answers to all of the above, you are ready to begin.

Start a New Proposal *(not NIH system to system)*

Login to InfoEd

<https://spogi.uvm.edu/>



Start a New Proposal *(not NIH system to system)*

Create New Proposal

1. Login to InfoEd using the link on the UVM SPA Home Page - <https://spogi.uvm.edu>
2. Click the "Proposals" button at top left corner (see below).
3. Click the "Create New Proposal" button (see below).

If you do not have a "Proposal" button or a "Create New Proposal" button, please contact SPA for assistance.

The screenshot displays the InfoEd Proposal Development System interface. At the top, there is a navigation bar with 'Find Funding', 'Welcome', and 'Logout'. Below this, a sidebar on the left contains several menu items: 'Proposals' (highlighted with a red box), 'IRB', 'IACUC', 'IBC', and 'My Profile'. The 'Proposals' menu is expanded, showing options like 'Show/List', 'Search For', 'Create New Proposal' (indicated by a red arrow), 'Ad Hoc Reports', and 'Standard Reports'. The main content area shows 'Records found: 0. Displaying page 0 of 0' and a search bar. On the right side, there is a 'My Calendar' for May 2017 and 'My Action Items'.

Start a New Proposal *(not NIH system to system)*

New Proposal Questionnaire

The New Proposal Questionnaire takes you step- by-step through the essential details of your proposal.

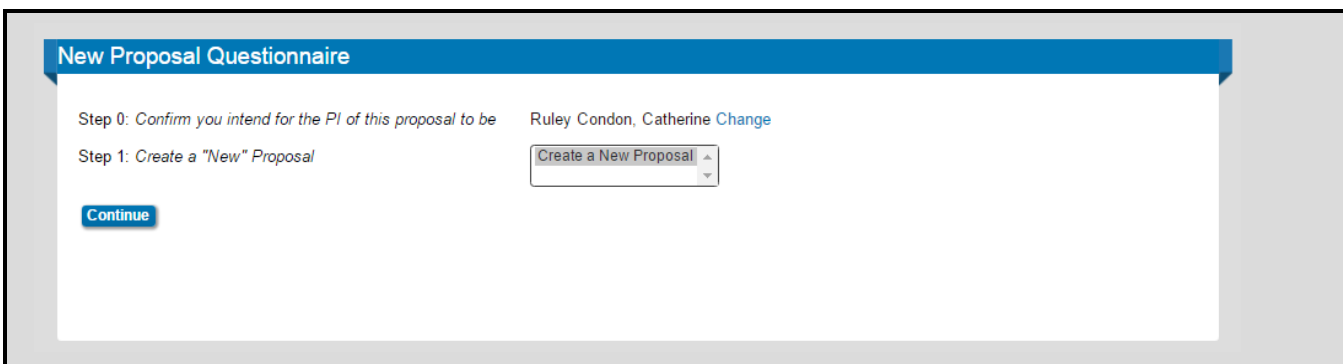
Answer each question with the most current information you have, then click “continue” to go on to the next question.

Remember, you may still correct or change this information after you create the proposal.

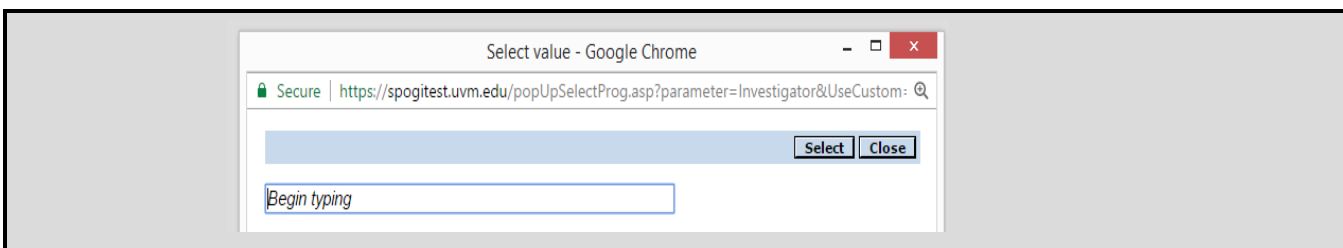
Principal Investigator

The PI name will default to the name of whoever has logged in to InfoEd to create the proposal. If you are a PI starting your own proposal, your name should appear correctly at the top of the page (see below). If you are a Department Administrator creating a proposal on the PI’s behalf, you will need to change the name as follows:

1. Click the “Change” hyperlink.
2. Begin typing the PI’s name until the name appears in the drop-down list.
3. Select the name and click “Continue.”
4. If the PI name does not appear in the drop-down list, please contact SPA for assistance.
5. Click continue



The screenshot shows the 'New Proposal Questionnaire' interface. At the top, there is a blue header with the text 'New Proposal Questionnaire'. Below the header, the interface is divided into two steps. Step 0 is 'Confirm you intend for the PI of this proposal to be' followed by the name 'Ruley Condon, Catherine' and a 'Change' hyperlink. Step 1 is 'Create a "New" Proposal' followed by a dropdown menu with the text 'Create a New Proposal' and a blue 'Continue' button.



The screenshot shows a browser window titled 'Select value - Google Chrome'. The address bar shows the URL 'https://spogitest.uvm.edu/popUpSelectProg.asp?parameter=Investigator&UseCustom:'. The browser content shows a dropdown menu with a search bar containing the text 'Begin typing'. To the right of the search bar are 'Select' and 'Close' buttons.

Select the Correct Setup Template

1. For a proposal that is not an NIH system-to-system proposal, you will select "Setup Proposal Manually."
2. If your proposal is an NIH system-to system, please pause here, return to the SPA Web Site and fine the "Start a new proposal (National Institutes of Health - System-to-System)" Step by Step Guide.
3. Click continue

New Proposal Questionnaire Back

Step 0: *Confirm you intend for the PI of this proposal to be* Ruley Condon, Catherine [Change](#)

Step 1: "New" Create a New Proposal

Step 1: *Continued* Setup Proposal Manually ▼

[Continue](#)

Select "Setup Proposal manually" for all other proposals
(Not System-to-System to Grants.gov)

Select Your Proposal Type

1. Most proposals will be either a New Proposal - Master Record or a Competitive Renewal - Master Record.
2. Select the appropriate type and click "Continue."
3. Note: If you are working with a Continuation or a Supplement on an existing award, please contact your SPA Research Administrator.
4. Click Continue

New Proposal Questionnaire Back

Step 0: *Confirm you intend for the PI of this proposal to be* Ruley Condon, Catherine [Change](#)

Step 1: "New" Create a New Proposal

Step 2: *Please Select a Proposal Type* New Proposal - master record ▼

[Continue](#)

Select New Proposal - master record
OR
Select Competitive Renewal - master record

Select the Sponsor

1. Begin typing the sponsor name. Once name appears, select it and continue.
2. If your sponsor name does not appear in the box, please contact SPA for assistance.
3. If you are not able to find your Sponsor's name in the list, please select "Unknown"
4. SPA will then reach out to you to get the sponsor name and will add that sponsor to the InfoEd list.
5. Click Continue

New Proposal Questionnaire Back

Step 0: *Confirm you intend for the PI of this proposal to be* Ruley Condon, Catherine [Change](#)

Step 1: "New" Create a New Proposal

Step 2: *Proposal Type* New Proposal - master record

Step 3: *Select a Sponsor* Massachusetts B

[Continue](#)

- Massachusetts Bar Foundation
- University of Massachusetts Boston

Enter Your Project Title

1. Please enter your proposal title with the major words capitalized. Please be sure there are no punctuation marks or extra spaces at the end.
2. Click continue.

New Proposal Questionnaire Back

Step 0: *Confirm you intend for the PI of this proposal to be* Ruley Condon, Catherine [Change](#)

Step 1: *"New"* Create a New Proposal

Step 2: *Proposal Type* New Proposal - master record

Step 3: *Selected Sponsor* Massachusetts Bar Foundation

Step 4: *"Tracking" Number or "Proposal" Number* This proposal will be automatically numbered.

Step 5: *Proposal's Title*

[Continue](#)

Project Dates

1. Enter the anticipated start and end date for your proposal and click "Continue."
2. Be sure that your proposed start and end dates fall within the sponsor's guidelines.
3. Click continue.

New Proposal Questionnaire Back

Step 0: *Confirm you intend for the PI of this proposal to be* Ruley Condon, Catherine [Change](#)

Step 1: *"New"* Create a New Proposal

Step 2: *Proposal Type* New Proposal - master record

Step 3: *Selected Sponsor* Massachusetts Bar Foundation

Step 4: *"Tracking" Number or "Proposal" Number* This proposal will be automatically numbered.

Step 5: *Proposal's Title* This is a test proposal

Step 6: *What are the project start and end dates?*

From

To

[Continue](#)

Confirm the Number of Budget Periods You Would Like

1. Confirm the number of budget periods is correct
2. Click continue

New Proposal Questionnaire Back

Step 0: *Confirm you intend for the PI of this proposal to be* Ruley Condon, Catherine [Change](#)

Step 1: "New" Create a New Proposal

Step 2: *Proposal Type* New Proposal - master record

Step 3: *Selected Sponsor* Massachusetts Bar Foundation

Step 4: *"Tracking" Number or "Proposal" Number* This proposal will be automatically numbered.

Step 5: *Proposal's Title* This is a test proposal

Step 6: *Project Start and End Dates* 01-Jul-2018 to 30-Jun-2022

Step 7: *How many years and/or budget periods would you like?*

***NOTE:** If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.

[Continue](#)

Is all the above Information Correct?

1. Review the information you provided in Questions 1 through 7
2. Use Back button at top right corner to step back though responses for any needed corrections.
3. Confirm the information you have entered or use the "Step back through responses" button to make corrections. Click Create Proposal button.

New Proposal Questionnaire Back

Step 0: *Confirm you intend for the PI of this proposal to be* Ruley Condon, Catherine [Change](#)

Step 1: "New" Create a New Proposal

Step 2: *Proposal Type* New Proposal - master record

Step 3: *Selected Sponsor* Massachusetts Bar Foundation

Step 4: *"Tracking" Number or "Proposal" Number* This proposal will be automatically numbered.

Step 5: *Proposal's Title* This is a test proposal

Step 6: *Project Start and End Dates* 01-Jul-2018 to 30-Jun-2022

Step 7: *Number of Budget Periods* 4

Is all of the above information correct? ***NOTE:** Clicking "Create Proposal" will create a new proposal with the properties you have indicated above. There is one final screen of questions to be completed before you can start entering your new proposal. Again, you will be able to change the properties of the proposal once it has been created if need be.

[Step back through responses](#) [Create Proposal](#)

InfoEd Proposal Number Assigned

1. InfoEd will assign a new proposal number.
2. Write down the proposal number so you can easily find it later on.

Start a New Proposal (not NIH system to system)

Setup Questions Tab

The InfoEd "Setup Questions Tab" will prompt you for responses to the questions

What is a Flow Through Project? A Flow Through Project means that UVM will be a subawardee/subrecipient under the Sponsor's project, which is in turn funded by another organization or by a federal agency.

Originating Sponsor Name - Flow Through Project

Is this a Flow Through Project? Select Yes or No

If yes, a new window will open. Just to the right of the Originating Sponsor field. Click the "Change" hyperlink

Select the first letter of the Originating Sponsor's name.

If you are not able to find the Originating Sponsor's name in the list, please select "Unknown"

SPA will then reach out to you to get the Originating Sponsor's name and will add that sponsor to the InfoEd list.

Click Continue

The screenshot shows the 'Sponsor/Template Selection' form with the following fields: Proposal Sponsor (Massachusetts Bar Foundation Change), Originating Sponsor (Not Set), Is this a Flow Through Project? (radio buttons for Yes/No), Proposal Type (New Proposal - master record), and Opportunity Number. A 'Change' link is next to the Originating Sponsor field. A pop-up window titled 'University (or Inst.) -Select Sponsor' is open, showing a list of letters (A-Z) and a search bar. The letter 'E' is selected, and the 'Environmental Protection Authority (NSW)' is visible in the dropdown. A 'Select' button is next to the dropdown. A red box highlights the 'Opportunity Number' field with the text 'Do NOT enter any data into Opportunity Number field'.

Deadline Date

Enter the sponsor's deadline date

If there is no deadline, enter the date you intend to submit the proposal

The screenshot shows the 'Deadline Information' form with the 'Deadline Date' field set to '01-Jun-2017'.

Associate Department

The Associated Department will automatically default to the Principal Investigator's Home Department.

If the proposal should be setup up in a department other than the Principal Investigator's home department, click the Add button to add the correct department.

Then save the page, using the save button at top left corner.

Then click the radio dial to change the Associated Department to the new Department. Save the page again, using save button at top left corner.

Finally, use the "remove" button next to the incorrect department to remove it. There should only be one department listed here.

Associate Centers/Programs

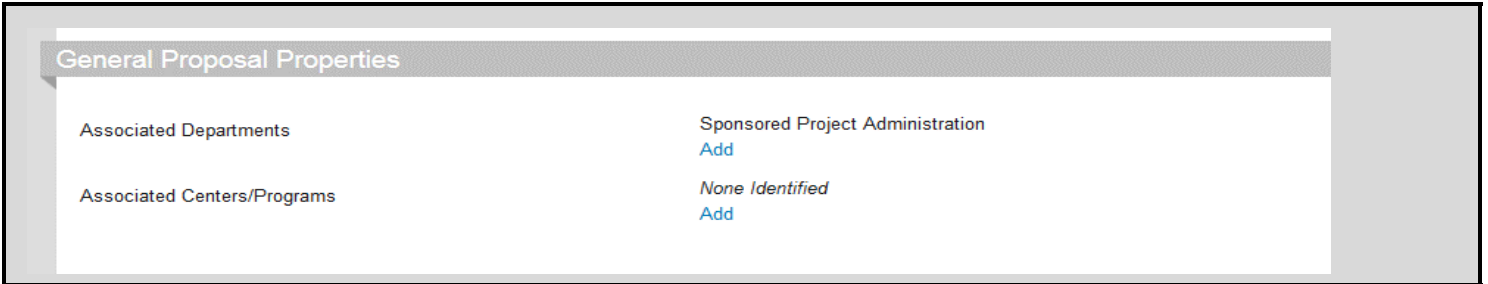
The Associated Centers/Programs will automatically default to "None Identified".

For most proposals, you need not do anything else with this field. Leave it as "None identified."

However, if you intend to use the PeopleSoft "Program" Chartfield, click the Add button and locate the Center/Program from the list.

Then save the page, using the save button at top left corner.

If you cannot find the appropriate Center/Program, please contact SPA for assistance.



General Proposal Properties	
Associated Departments	Sponsored Project Administration Add
Associated Centers/Programs	None Identified Add

Program Type - UVM F&A Rate

Select Program Type - Select from drop box the appropriate F&A Rate to be used.

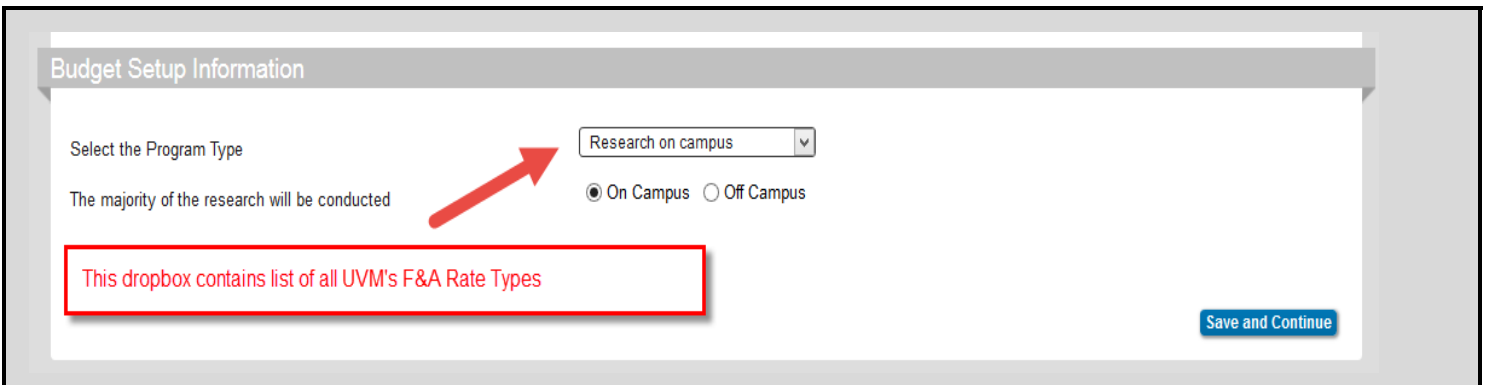
If you don't know which F&A Rate Type to pick, contact SPA for assistance

Indicate whether the majority of the work will be done On Campus or Off Campus.

This should match the F&A Rate you selected above.

Save and Continue

Your proposal record is now set up and you can begin completing the rest of the tabs.



Select the Program Type

The majority of the research will be conducted

On Campus Off Campus

This dropdown contains list of all UVM's F&A Rate Types

[Save and Continue](#)

Click Save and Continue. The proposal Setup Questions are now complete.

Start a New Proposal *(not NIH system to system)*

Personnel Tab

Please do not add Personnel to this Tab and please do not upload CV/Biosketch or Current/Pending Support.

The SPA Research Administrator will add all the personnel names on this tab and will complete the Tab.

Personnel
Completed

Edit Mode

Add Personnel [show]

Key									
PI	Name/Role	Mail	Alert	Order	Organization / Department	CV/Biosketch	Current/Pending Support	Remove Person	
<input checked="" type="radio"/>	Catherine Ruley Condon <i>PD/PI*</i>			0	The University of Vermont and State Agricultural College Sponsored Project Administration				
<input type="radio"/>	Julie A. Macy <i>Co-Investigator</i>			<input type="checkbox"/>	The University of Vermont and State Agricultural College Sponsored Project Administration				
<input type="radio"/>	Lynn Tracy <i>Co-Investigator</i>			<input type="checkbox"/>	The University of Vermont and State Agricultural College Research Integrity & Administration				

Non-Key									
PI	Name/Role	Mail	Alert	Order	Organization / Department	CV/Biosketch	Current/Pending Support	Remove Person	
<input checked="" type="radio"/>	Kerry R.Cyr <i>Technician</i>			<input type="checkbox"/>	The University of Vermont and State Agricultural College Sponsored Project Administration				

Start a New Proposal *(not NIH system to system)*

Internal Documents Tab

There are typically 3 or 4 documents uploaded at the bottom on this Tab.

1. Sponsor Guidelines (optional)

The SPA Research Administrator will upload the Sponsor Guidelines (if there are any) at the bottom of this Tab.

2. SPA Budget Worksheet (required)

The SPA Research Administrator work closely with Principal Investigator and Department Administrator to develop the proposal budget using the below excel SPA Budget Worksheet. Once the budget is completed, SPA will upload a pdf version of the spreadsheet to InfoEd.

3. SPA Routing Form (required)

The Principal Investigator or the Department Administrator will open and complete the SPA Routing Form, which is now an electronic form embedded within InfoEd on the Internal Documents Tab.

4. Proposal (required)

The Principal Investigator (PI) or PI delegate will upload the proposal document in keeping with the below requirements.

Once all required documents are uploaded, click the "Completed" box at the top right corner to the tab.

Internal Documents Completed

There are typically 2 or 3 documents uploaded at the bottom on this Tab.

- Sponsor Guidelines (optional) - The SPA Research Administrator will upload the Sponsor Guidelines (if there are any) at the bottom of this Tab.
- SPA Routing Packet (required) - The SPA Research Administrator will convert the final SPA Budget Worksheet from excel to pdf and will upload it at the bottom of this Tab.
- Proposal (required) - The Principal Investigator (PI) or PI delegate will upload the proposal document in keeping with the below requirements.

Uploaded Proposal Requirements

- Draft or Final Version: The PI may wish to continue working on the project plan after the routing process starts.
- Therefore, the PI is allowed to route the proposal either in DRAFT or FINAL form.
- If a draft is uploaded, the draft must be substantially complete and the budget and resource commitments must be final.
- After the route is completed, the PI will be asked to EMAIL the final proposal version to the SPA Research Administrator (not via InfoEd as the route will not be repeated).
- Format: The proposal document must be converted to pdf format and uploaded as one single document (in rare instances when a proposal exceeds 1,000 pages, it can be broken into sections and named as follows - Proposal 1 of 3, Proposal 2 of 3, etc.).
- Grants.gov Adobe Packages: If your proposal is in Grants.gov Adobe Package format, you may upload the whole package.

How to Upload the Proposal

- Scroll to the very bottom of this Tab and locate the blue link "Add Institution Forms / Supporting Documents." Click the link
- Click the Browse box and then locate the proposal on your computer (again, it must be uploaded as one single pdf document).
- Locate the Name box. Use either Draft Proposal or Final Proposal as the name. This lets Chairs and Deans know whether the proposal you are routing is in draft or final format.
- Click the Upload button to upload the proposal.
- After a few moments, you will see a red message asking you to close the box. Click Close.
- The uploaded proposal will be available at the bottom of the Tab. Click the "view" icon to see the full document.
- Once all the required documents are uploaded, click the "Completed" box at the top right corner of the Tab.
- Once all the Tabs are completed, you are ready to start the routing process.

Components for Initial Application

Form/Document Name	Edit	Status	Upload	Remove
SPA Routing Form (SPA Routing Form)		Completed		Mandatory
Budget Worksheet Period 1 (SPA Budget Worksheet)		Completed		
Draft Proposal (Proposal)		Completed		

Start a New Proposal *(not NIH system to system)*

Finalize Tab - Submit for Internal Review

All proposals must be approved by Chair and Dean of all people listed on proposal

InfoEd's electronic routing system will direct emails to Chairs and Deans who need to approve this proposal

All Tabs must be "Completed" with top right corner "Completed" box checked

To start that process, click the "Submit for Internal Review" thumbs up icon

Finalize

[BUILD PDF / FORM PAGES](#)

[ASSEMBLE APPLICATION](#)

[SUBMIT FOR INTERNAL REVIEW](#)

Once your proposal has been completed, it can be electronically routed internally for necessary approvals. This page will display in two modes: Un-submitted and Submitted.

The screen is in Un-submitted mode when your proposal has not yet been routed. You can determine this by visually identifying a "thumbs up" on the screen. If it is there, then the proposal has not yet been submitted.

The screen is in Submitted mode when your proposal has been submitted and you can see the approval path it is on. Your Administrators have configured the approval path that they feel is appropriate for your proposal. If you have any questions regarding this process, please contact them.

Components for Initial Application

Form/Document Name	Edit	Status	Upload	Remove
Draft Proposal.docx (Proposal)		Completed		
SPA Budget Worksheet Period 1.docx (Budget - Requested)		Completed		
Sponsor Guidelines.docx (Proposal Guidelines)		Completed		
Assembled Doc		Completed		

[Add Institution Forms/Supporting Documents](#)

Submit Final Review

Start a New Proposal *(not NIH system to system)*

Principal Investigator Certification

PI reads PI Certification - clicks "Accepted" - enters UVM Net ID at prompt - clicks Continue button

If a PI Delegate starts the route, the PI is obligated to send the PI Certification to SPA via email.

The PI Certification must be received in SPA before the proposal may be submitted to the sponsor.

https://spogi.uvm.edu/Protocol/SubmissionLogin.asp?ObjectID=39E50A0311885042E0539E64C68447AC

Certification Close

By signing this form, the Principal Investigator certifies the following:

(a) (1) that the information submitted within the application is true, complete and accurate to the best of my knowledge; (2) that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties; and (3) that I agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of the application. (12-07-12)

(b) I have read and understand the University's conflict of interest policy and have made disclosures required by it, if any; and will comply with any conditions or restrictions imposed by the University to manage, reduce or eliminate actual or potential conflicts of interest. As the federal regulations require that disclosures be made by anyone at the institution who is responsible for the design, conduct, or reporting of research or educational activities funded or proposed for funding by NSF or PHS, I have informed the relevant personnel on this project of this requirement; I am not currently debarred, suspended or ineligible to receive federal funds; I have not used federal or non-federal funds to influence an officer or employee of Congress, or any other person with regards to this application; as Principal Investigator of this proposed project, I acknowledge the responsibility associated with this role and agree to comply with the sponsoring agency's terms and conditions for the award; I understand and agree to comply with the University of Vermont's policies and procedures regarding sponsored projects. (12-07-12)

(c) For NIH proposals I am aware of and will comply with the NIH Public Access Policy requiring that all publications resulting from NIH funded research be made publicly available no later than 12 months after the official date of publication through the National Library of Medicine's database PubMed Central. (12-07-12)

(d) For NIH Postdoctoral Fellowship proposals as a Fellow and/or Sponsor I certify (1) the information submitted within the application is true, complete and accurate to the best of my knowledge; (2) any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties; (3) that I (as the Sponsor(s)) will provide appropriate training, adequate facilities, and supervision if a fellowship is awarded as a result of the application; and (4) that I (as the Fellow) has read the Ruth L. Kirschstein NRSA Payback Assurance and will abide by the Assurance if an award is made, and that the award will not support residency training. (12-07-12)

Accepted Declined

Username: Password:

Start a New Proposal *(not NIH system to system)*

Submit to Internal Route

After a few moments, a list of the required approvers will appear.

PI clicks Submit button to start internal route.

Once the route is successfully started, the PI will see a new window open on Finalize Tab that shows "Active Routing Progress. The PI can check here to see progress of internal approvals.

Proposal 32307 - Catherine Ruley Condon "Test Proposal" (In Development)

[Refresh Route](#) Route Path - **UVM Approval Route - current** [Add New Person to Review Path](#)

Step 1	SPA Initial Review	Ms. Julie A. Macy	
Step 5	Department Chair	Sudha Ramaswami	
Step 6	Dean	Richard A Galbraith	
Step 8	SPA Final Approval	Ms. Julie A. Macy	

No comments have been recorded yet

Submit to Route - Click Submit button to start route

Components for **Initial Application**

Current Submission

Form/Document Name	Edit	Status	Upload	Remove
Draft Proposal.docx (Proposal)		Completed		
SPA Budget Worksheet Period 1.docx (Budget - Requested)		Completed		
Sponsor Guidelines.docx (Proposal Guidelines)		Completed		
Assembled Doc		Completed		

[Add Institution Forms/Supporting Documents](#)

Active Routing Progress
Open Full

Route Name	Route Type	Step Number/Name	Who	Notified	Decision	Insert	Remove
UVM Approval Route - current	Final Review	Inserted Step	Catherine Ruley Condon	11-May-2017 3:53:04 PM			
UVM Approval Route - current	Final Review	Step 1 - SPA Initial Review	Ms. Julie A. Macy				
UVM Approval Route - current	Final Review	Step 5 - Department Chair	Sudha Ramaswami				
UVM Approval Route - current	Final Review	Step 6 - Dean	Richard A Galbraith				
UVM Approval Route - current	Final Review	Step 8 - SPA Final Approval	Ms. Julie A. Macy				

Once route is started, this new box opens so that the Principal Investigator can monitor the routing progress.

Start a New Proposal *(not NIH system to system)*

Lock Down - When Proposal is In Route, it is in "Lock Down" mode

While the proposal is in route for approvals, it is in lock down mode and the Principal Investigator will no longer be able to edit the proposal. We expect that the Principal Investigator will continue to tweak the proposal documents outside of the InfoEd system.

Electronic Routing System - Review Dashboard - This is how Deans and Chairs Approve Proposal

Chairs and Deans receive notification to review and approve your proposal in three different ways

- 1) UVM Email system
- 2) InfoEd My Messages (a back up method if the email is accidentally deleted)
- 3) InfoEd Action Items (another back up method if the email is accidentally deleted)

Start a New Proposal *(not NIH system to system)*

Routing System Email to Deans, Chairs, SPA and Other Approvers

From: System Administration, UVM InfoEd [mailto:catherine.ruley@uvm.edu]

Sent: Friday, August 12, 2016 2:57 PM

To: Cathy Ruley Condon <Catherine.Ruley@uvm.edu>

Subject: PROP APPRVL needed for Catherine Ruley Condon -31583

Principal Investigator Catherine Ruley Condon

Proposal 31583

Project Title "Demonstration Proposal"

American Lung Association

Sponsor Deadline 30-Aug-2016

Dear Reviewer/Approver:

Catherine Ruley Condon needs your approval to submit the proposal referenced above.

This email is coming to you via the UVM InfoEd Electronic Proposal Routing System.

You will receive this email in your InfoEd My Messages inbox as well.

- 1) Click Reviewer Dashboard link to access [***Review Dashboard***](#)
- 2) Login with your UVM Net ID (your COM IS login will not work for InfoEd)
- 3) The Review Dashboard will appear in separate window
- 4) Click HELP Tab for instructions (if needed - optional/informational)
- 5) Click REVIEW Tab to review and approve proposal documents. After you have reviewed all documents, click the DONE box next to each item. Then click the SAVE icon located at top right corner. You will not be able to approve the proposal unless you save the DONE changes.
- 6) Add Comments: Add comments if you wish. Click the SAVE icon at top right corner when you are finished adding comments.
- 7) See Comments: View other reviewer comments at top right corner of screen. Click the SAVE icon at top right corner.
- 8) My Decision is: Select "Approve Proposal Submission" or "Return to PI for Changes." For approvals, you will must click the Accept button for the Approver Certification. Then click SAVE icon at top right corner. You will be prompted for your Username and Password (UVM Net ID). Then click ACCEPT to finish.
- 9) Click ROUTE Tab to see route path and to confirm your decision has been recorded. You are now done and you may "X" out of the Review Dashboard.

Sponsored Project Administration

217 Waterman Building

802-656-3360

[text updated 12-13-12]

Start a New Proposal *(not NIH system to system)*

Review Dashboard

Review Tab

1. Comments are optional.
2. If you wish to add comments, please type our comments in one of the four boxes.
3. Then click "Save" icon at top right corner page

IMPORTANT: Comments do not "go" anywhere. They are meant as "notes to the file" and to inform reviewers who come after you in the route path. If you have important comments for the Principal Investigator, for SPA or for other reviewers who have already reviewed the proposal, you are advised to email or call with your comments.

The screenshot shows the 'Review Dashboard' for a proposal. On the left is a vertical navigation menu with 'HELP', 'REVIEW', and 'ROUTE' buttons. The main content area is titled 'Proposal - Initial Application' and includes the following information:

- Number: 31583
- Title: Demonstration Proposal
- Sponsor: American Lung Association
- Submitted: 12-Aug-2016 2:56:54 PM

A table lists the documents submitted for review:

Form/Document	Submitted		Review Status
Draft Proposal	12-Aug-2016 2:39:03 PM	Replace	Un-Reviewed
Routing Packet Period 1	12-Aug-2016 2:38:32 PM	Replace	Un-Reviewed
Sponsor Guidelines	12-Aug-2016 2:38:50 PM	Replace	Un-Reviewed

Below the table are two comment boxes: 'Add Comments: To be shared with everyone' and 'Between you and the PI'. To the right is a 'My Decision is:' dropdown menu. At the top right, there is a 'Comments I can see...' section with the text 'No Comments have been recorded'. A red box highlights the document links in the table with the text 'These are the documents for review by Chairs, Deans, SPA and other approvers'. Red arrows point from this box to the document links, from the 'Un-Reviewed' status dropdowns to the 'My Decision is:' dropdown, and from the 'Comments I can see...' section to the top right corner of the page.

Start a New Proposal *(not NIH system to system)*

Final Steps

Once the proposal routing process has started, the InfoEd record is no longer editable.

We expect that the Principal Investigator will make final tweaks to the proposal, even after the route is started.

When the route is completed, the SPA Research Administrator will notify the Principal Investigator that the route is completed.

Then, once the proposal document is in its final form, the Principal Investigator will email the final version to the SPA Research Administrator.

Or, if the proposal is being built in the sponsor's web based system, the Principal Investigator will let the SPA Research Administrator know when the proposal is final and ready for final review, approval and submission to sponsor.

The SPA Research Administrator will review the final proposal and will coordinate the final submission to the sponsor with the Principal Investigator.

Final Proposal Document is Uploaded to InfoEd Attachments Tab by SPA Research Administrator

Once the proposal submission process is completed, the SPA RA will copy the final submitted document from the NIH eRA Commons to InfoEd.

Both the "Draft" that was routed for internal approvals and the "Final" proposal submitted to NIH will be available on the InfoEd Attachments Tab in the Proposal Tracking (PT) system