To: Deans, Directors and Department Chairs.

From: Ruth Farrell, Associate Vice President for Research Administration
      Beverly Blakeney, Director of Pre-Award Services

Re: Electronic Routing System for Grants to be launched March 1, 2011

Date: December 15, 2010

As you know, UVM Principal Investigators currently use a paper form to collect dean and department chair approval signatures for proposal submissions. The Principal Investigator delivers the routing form, budget worksheet and a copy of the proposal to chairs and deans for review and signature and then walks these documents to OSP's Pre-Award Services for final proposal review and institutional approval.

We are pleased to announce that the internal routing process will soon be performed electronically. No more paper! We plan to launch the InfoEd electronic routing system in March 2011.

InfoEd Electronic Proposal Routing System

Some of you may be familiar with InfoEd, the electronic system that OSP's Pre-Award Services uses for its award reports, and for proposal submission to NIH. The InfoEd electronic proposal routing system provides a simple template into which users can upload the routing form, budget worksheet and proposal documents. Once the PI is ready to route the proposal for approvals, he/she clicks a button to send the proposal to the electronic routing system.

The system sequentially emails the "Reviewer Dashboard" first to department chairs and then deans for review and approval (or rejection). Once the department chairs and deans have all approved the proposal, it moves electronically to OSP's Pre-Award Services for final review, approval and UVM institutional signature.

We are excited about this new electronic process and we believe that you and your faculty will greatly appreciate the move to electronic routing.

Training

- Deans and Department Chairs may have individual or small group sessions to learn to log into InfoEd, navigate to proposal records, access the Electronic Routing System's Reviewer Dashboard, and provide electronic approval (or rejection) of proposals. Please contact Cathy Ruley Condon at Catherine.Ruley@uvm.edu or at 656-5580 to schedule a one-hour training session in your office, college or school at a time convenient for you.
• **Department Administrators** will have hands-on group training sessions in January. An announcement with the specific dates will be issued in coming weeks. Department administrators will learn to log into InfoEd, navigate to proposal records, upload documents, send proposals into the InfoEd Electronic Routing System, access the Electronic Routing System’s Reviewer Dashboard, and provide electronic approval (or rejection) of proposals. They will also learn to use the proposal tracking system to track proposals and create reports and alerts.

• **Principal Investigators** will receive instruction as they need it on a just-in-time basis. When they notify OSP’s Pre-Award Services of intent to submit a proposal, our office will reach out to offer PI instruction in four ways:
  1) Web Site Step by Step Guides
  2) In person in PI’s office at a time convenient for PI
  3) On the phone training at a time convenient for PI
  4) Referral and help from the Department’s designated "InfoEd Support" person if appropriate, depending on the department

**Timeline**

• December, January and February - Department Chair and Dean individual training sessions

• January – Department Administrators hands-on group training sessions

• Mid February on - All proposals with submission deadline of March 1 or later will be electronically routed for approvals

**Next Steps**

Deans and Department Chairs are asked to contact Cathy Ruley Condon at Catherine.Ruley@uvm.edu or at 656-5560 to schedule a one-hour training session. You will likely want to include the Department Administrator(s) who typically assists you in the proposal review and approval tasks so that we can set up delegation or backup privileges for that person(s).

The dates for the January training sessions for Department Administrators will be announced in coming weeks.

Please feel free to contact Ruth Farrell or Beverly Blakeney or send an email to ospuvm@uvm.edu with questions. We look forward to working with you as we implement this new electronic routing system.