

# Finalize

Rev. 9/22/19

Proposal  
PD19-00428

ISMMS Project - Finalize Tab  
Allison Gottlieb- Grants and Contracts Office (Icahn School of Medicine at Mount Sinai)

Done Save

- Setup Questions
- Brief Lay Summary
- Research or Program Plan
- Personnel
- Classification Codes
- New / Competitive Renewals / R...
- Internal Documents

Finalize

Support

Show Help

## Finalize

BUILD PDF / FORM PAGES

ASSEMBLE APPLICATION

Document	Page Count	Sequence	Edit	
				Build
Brief Lay Summary	1	<input type="text" value="1"/>		
New / Competitive Renewals / Resubs v1.6.3	2	<input type="text" value="2"/>		
Research or Program Plan	3	<input type="text" value="3"/>		

This section allows you to assemble the final proposal. All of the necessary components should have been generated from the system into PDF documents or uploaded and converted (if necessary) into PDF documents.

The first step is to indicate which "sequence" you would like the components to be assembled in. A default order has been set, but you may choose a different sequence if you like.

You may also indicate which pages you would like numbers to appear on the bottom of, and what the starting point is for those numbers. If you do not want sections to be numbered, leave the box for that section blank. Page numbers are sequential within a given section.

## Important!

- ✓ Only the PI can complete this tab. It is his/her electronic signature.
- ✓ All of the preceding tabs must be completed in order to finalize. If you do not see the checkmark, return to the appropriate tab and include.
- ✓ On NIH multiple PI (MPI) grants after finalizing, all the PIs including the contact PI are added to the route. All the PIs must log on and approve.

# Finalize

Finalize

[BUILD PDF / FORM PAGES](#)

[ASSEMBLE APPLICATION](#)

Document	Page		Edit
	Count	Sequence	Build
Brief Lay Summary	1	<input type="text" value="1"/>	<input type="button" value="Build"/>
New / Competitive Renewals / Resubs v1.6.3	2	<input type="text" value="2"/>	
Research or Program Plan	3	<input type="text" value="3"/>	

## Step 1 – Click on Build.

This section allows you to assemble the final proposal. All of the necessary components should have been generated from the system into PDF documents or uploaded and converted (if necessary) into PDF documents.

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Finalize

[BUILD PDF / FORM PAGES](#)

[ASSEMBLE APPLICATION](#)

[SUBMIT FOR INTERNAL REVIEW](#)

Once your proposal has been completed

## Step 2 – Click on the "Thumbs Up" icon.

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.

Current Proposal Status: **Under Development**

Components for **Initial Application**

Current Submission

Form/Document Name	Edit	Status	Upload	Remove
Assembled Doc		Completed		

[Add Institution Forms/Supporting Documents](#)

Submit Final Review



# Finalize

Certification Close

This is a research and/or sponsored programs application and I certify that the following statements are true and accurate:

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. 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.

Accepted  Declined

Username  Password

Step 3 –

Click on

“Accepted.”

Step 4 – PI’s

Username and

Password will

appear. Click

on Continue.

Step 5 – Click on Submit.

Proposal PD 19-00428 - Allison Gottlieb "Finalize Tab - " (Under Development)

[Refresh Route](#) Route Path - **ERROR! Default Route** [Add New Person to Review Path](#)

Step 1	Step 2	Michelle Smith	
	Step 2	Stephen Green	

Do not click on  
“Add New Person  
to Review Path”  
unless you have  
received GCO and

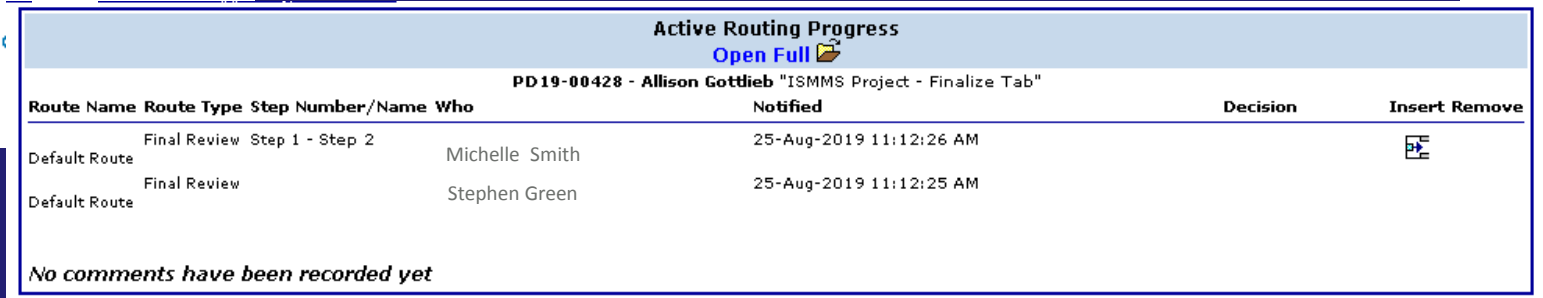
departmental approval to do so. Adding extra signatories unnecessarily delays your application.

# Finalize – Successfully Submitted!

- ✓ Setup Questions
- ✓ Brief Lay Summary
- ✓ Research or Program Plan
- ✓ Personnel
- ✓ Classification Codes
- ✓ New / Competitive Renewals / R...
- ✓ Internal Doc
- ✓ **Finalize**

If you see the “Active Routing Progress” chart on your Finalize Tab, you have successfully routed your project to the associated department(s).

Continue to check this chart to make sure that departmental signatories have signed off.



**Active Routing Progress**  
[Open Full](#)

PD19-00428 - Allison Gottlieb "ISMMS Project - Finalize Tab"

Route Name	Route Type	Step Number/Name	Who	Notified	Decision	Insert	Remove
Default Route	Final Review	Step 1 - Step 2	Michelle Smith	25-Aug-2019 11:12:26 AM			
Default Route	Final Review		Stephen Green	25-Aug-2019 11:12:25 AM			

*No comments have been recorded yet*

## The Route - Pictorial

1. PI approves → 2. Submits to Dept(s) → 3. Dept(s) Approves → 4. Submit to GCO

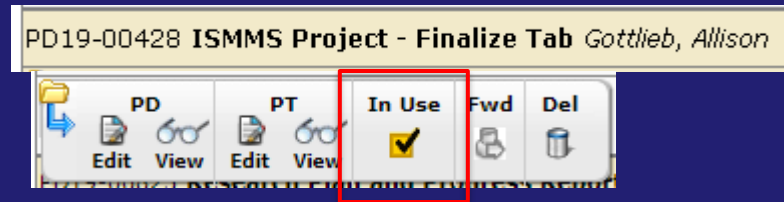


National Institutes of Health (NIH) Multiple PI (MPI) grants have additional steps.

# Finalize – Can't Submit?

## Top Problems and Solutions

1. Delegate rather than PI attempts to complete the finalize tab. Only the PI can finalize. **Delegates must never log in using their PI's login info.**
2. PI attempts to finalize when delegate is still logged into the application. If the delegate sees from the project list that the application is "In Use," he/she must log out properly.



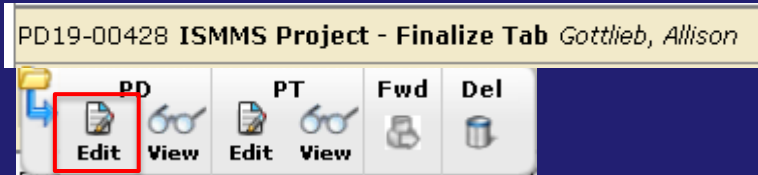
3. **Logging out improperly from any of the InfoEd tabs will lock your application.** Please log out properly by clicking on "Done" in each of the tabs rather than the "X" at the top of your screen. When logging out improperly, it will appear that your application is "In Use" (see screenshot above) and it will take longer to go back in to sign off.



# Finalize – Can't Submit?

## Top Problems and Solutions

4. Can't find the **Build** or **Submit Final Review** buttons? Make sure you are in "Edit" rather than "View" mode. Exit out of your proposal. Enter through "Edit" mode.



5. Still can't find the "Thumbs Up?" Click on the "Submit For Internal Review" link.

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.

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[Add Institution Forms/Supporting Documents](#)

**Submit Final Review**