### InfoEd Setup Questions Tab Instructions for a New Non-S2S Submission

#### Follow these instructions...

<table>
<thead>
<tr>
<th>...for any...</th>
<th>...and is unfunded, or funded by...</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>A non-federal agency</td>
<td>New unfunded study</td>
</tr>
<tr>
<td>Competitive Renewal</td>
<td>A subaward</td>
<td>New American Cancer Society grant</td>
</tr>
<tr>
<td>Resubmission</td>
<td>National Science Foundation (via Fastlane)</td>
<td>New Pfizer clinical trial</td>
</tr>
<tr>
<td>Resubmission of a Competitive Renewal</td>
<td>NASA (via NSPIRES)</td>
<td>Resubmission of NYU subaward</td>
</tr>
<tr>
<td>...application...</td>
<td>A Contract (i.e., not a grant)</td>
<td>New NIH contract</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Resubmission of NIH P50 on ASSIST</td>
</tr>
</tbody>
</table>

**Other:**
- Change of Grantee (i.e., Transfer) Applications
  Follow these instructions for all Change of Grantee applications except those single project applications submitted to the NIH/AHRQ/HRSA/DOD. Single project NIH/AHRQ/HRSA/DOD transfer applications follow S2S instructions.
- If this is a non-competing continuation subaward, and this is the *first year* the project is active at Mount Sinai, follow these instructions.
- This instruction set includes multi-project applications to the NIH and all other funding agencies.

**Non-S2S?** Non-S2S means you are using InfoEd to create your proposal and route it to the departments and then the Grants and Contracts Office (GCO) for approval. You are *not* using InfoEd to also submit the sponsored project directly to the funding agency.

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Need Help? [Open Ticket with Research IT](#) or click on the [Support](#) icon on the Setup Questions tab.
1. Login to InfoEd and enter user ID and password. [https://eresearch.mssm.edu](https://eresearch.mssm.edu)
2. Click on My Proposals.
3. Click on Create New Proposal
4. Click on Continue if you are not changing the PI. Then skip to 10.
5. Click on “Change” if you are changing the PI.
6. Begin typing the PI’s name.
7. Select person from the list. Person is highlighted in gray.
8. Click on Select.
9. Click on Continue.
10. Change the default by clicking on Select Proposal Manually and then Continue.
11. Select
   - New Proposal
   - Resubmission or
   - Competitive Renewal
Review table for more info.
12. Select Continue.

See GCO’s [Glossary of Common Terms](https://eresearch.mssm.edu) for definitions.
13. Begin typing funding agency's name. Review table for information about select sponsors.

14. Select funding agency from the drop down list.

15. Select Continue.

16. Enter proposal title and click on Continue.

17. Add project start and end dates. Review table for more info.

18. Select Continue.

19. Select Create Proposal.

**Step 3 Table – Sponsor (Funding Agency)**

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Type or Partially Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internally funded</td>
<td>“Icahn School of Medicine at Mount Sinai”</td>
</tr>
<tr>
<td>National Institutes of Health</td>
<td>“Institutes”</td>
</tr>
<tr>
<td>A subaward</td>
<td>Name of institution (e.g., Albert Einstein, Columbia) submitting grant or contact to the funding agency.</td>
</tr>
</tbody>
</table>

**Step 4. “Tracking” Number or “Proposal” Number**

This proposal will be automatically numbered.

**Step 5. Proposal’s Title**

Cure Cancer Now

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

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/2018</td>
<td>6/30/2021</td>
</tr>
</tbody>
</table>

Example:

- Wrong: Project Start: 7/1/2018, Project End: 7/1/2021

Sometimes periods are less than one year too. That is fine.

**Step 6 Table – Project Start and End Dates**

<table>
<thead>
<tr>
<th>If...</th>
<th>What Dates do I Enter?</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is an unfunded study or</td>
<td>Enter a maximum of one year and estimate the start and end dates.</td>
</tr>
<tr>
<td>The project start date is dependent</td>
<td>Once the IRB or IACUC approves your project, the GCO will update the project dates to synchronize accordingly.</td>
</tr>
<tr>
<td>on IRB or IACUC approval (e.g.,</td>
<td></td>
</tr>
<tr>
<td>industry funded clinical trial)</td>
<td></td>
</tr>
<tr>
<td>This is a sponsored project</td>
<td>The project period start and end dates required by the funding agency</td>
</tr>
</tbody>
</table>

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

NOTE: If you need additional years or periods beyond 7, you may add the extra needed once inside the proposal.

18. Select Continue.

**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.

19. Select Create Proposal.
This is incorrect. Please change as per these instructions.

<table>
<thead>
<tr>
<th>Select</th>
<th>For</th>
</tr>
</thead>
<tbody>
<tr>
<td>- New, Comp-Cont. or Transfer (non-S2S, no budget)</td>
<td>- Unfunded Projects (i.e., Sponsor: “Icahn School of Medicine at Mount Sinai”)</td>
</tr>
<tr>
<td>- New, Comp-Cont. or Transfer (non-S2S, with budget)</td>
<td>- All Other Sponsored Projects</td>
</tr>
</tbody>
</table>

You are changing the submission mechanism for this proposal. There may be previously completed components of this proposal that might have to be re-done because of formatting differences between the two mechanisms.
22. If incorrect, update funding sponsor by clicking on Change.
23. Answer Yes or No. Cover letters to the GCO may also be included in the “Internal documents” tab.
24. Answer Yes or No. Training grants are grants that are not individual fellowships, but are specifically designed to provide training as their primary purpose.
25. Does the PI have more than one faculty appointment or has he/she changed departments? If so, please review the departments listed. The proposal will be routed to the PI’s department shown here. If this is not accurate, click on the Add buttons to change.
26. Keep the default as On Campus unless research is Off Campus (i.e., generally the VA facility.)
27. Select Save and Continue.

Additional Note for Multi-Project Applications

You must also create the individual subprojects. This is not done on the SetUp Questions tab but rather through the Budget or Personnel tabs. Below are the initial steps you can take on either of these tabs.

Initial Steps > Personnel or Budget Tab
1. Click on Proposal Element icon.
2. Click on Add Subproject.