Creating a New Non-S2S Submission

Use these instructions if you are creating a New, Competitive Renewal, Resubmission, or Resubmission of a Competitive Renewal; to any non-NIH funding agency. Also if you are creating an application for a Contract, no matter whom the funding agency.

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CREATING AN ORIGINAL, NON-SYSTEM-TO-SYSTEM PROPOSAL

These instructions tell you how to create an original proposal that will not be submitted system-to-system.

If you have questions about system-to-system versus non-system-to-system submissions, see our FAQ page on the subject at http://osticket.mssm.edu/support/kb/faq.php?id=4.

Remember that an original proposal is for a competitive budget cycle; it represents new money.

You will need to complete these steps in one sitting. While this is one of the longer processes in InfoEd, it is also one of the simplest.

Estimated Time to Complete

15 to 20 minutes.

Prerequisites

You need access to the My Proposals module. After you log in, you should see My Proposals in the left menu bar.

Instructions

Each subsection in these instructions corresponds to a step in the setup questions.

1. Log in to InfoEd.

2. From the menu bar on the left side of the page, click My Proposals. The tab expands to show more menu options.

3. Click Create New Proposal. InfoEd launches a new window, the New Proposal Questionnaire:

<table>
<thead>
<tr>
<th>New Proposal Questionnaire</th>
<th>Proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 0: Select the PI</td>
<td>Training, Chen L - or - [change PI] now please</td>
</tr>
<tr>
<td>Step 1: Create a &quot;New&quot; Proposal or &quot;Copy From Existing&quot;?</td>
<td>Do you want to...</td>
</tr>
<tr>
<td>Create a New Proposal</td>
<td>[Create a New Proposal]</td>
</tr>
<tr>
<td>Copy From Existing Proposal</td>
<td>[Copy From Existing Proposal]</td>
</tr>
</tbody>
</table>

   Continue to Next Step

Step 0: Select the PI

1. The logged in user (you) is automatically selected as the PI. If this is okay, skip to Step 1: New or Copy From Existing Proposal on page 3. If you are creating this proposal for someone else, you will want to change the PI and continue with these instructions.
2. Click the **Change PI** button. InfoEd displays the Personnel pick list:

   **New Proposal Questionnaire**

   **Step 0**

   Confirm you intend for the PI of this proposal to be  
   Training, Chen L. or [Click on Change PI] now please

   **Step 1**

   Create a "New" Proposal or "Copy From Existing"?

   ![Personnel pick list](image)

   Select the first letter of the person's last name.

3. From the drop-down list, select the person:
5. Click the Select button. InfoEd returns you to Step 0, and you should see the PI that you selected:

<table>
<thead>
<tr>
<th>New Proposal Questionnaire</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 0</strong></td>
</tr>
<tr>
<td>Confirm you intend for the PI of this proposal to be Training, Renee S - or - Change PI now please</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Step 1</strong> Create a &quot;New&quot; Proposal or &quot;Copy From Existing&quot;?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you want to...</td>
</tr>
<tr>
<td>Create a New Proposal</td>
</tr>
<tr>
<td>Copy From Existing Proposal</td>
</tr>
</tbody>
</table>

6. Continue to Step 1: New or Copy From Existing Proposal.

**Step 1: New or Copy From Existing Proposal**

These instructions assume that you are creating a new, blank proposal. InfoEd also enables you to copy all of the settings, choices, and uploads from any proposal to which you have access, and use it as the starting point for a new proposal.

1. Ensure that Create a New Proposal is selected. This is the default.

2. Click the Continue to Next Step button.

**Step 1 Continued... (funding opportunity)**

1. If your funding opportunity is in SPIN, select Select from all SPIN Opportunities.

If your funding opportunity is not in SPIN or your project is unfunded, skip to 2. below.
a. You will be prompted to enter search criteria for SPIN. Enter the criteria, and click the Search button. The results are displayed on this screen:

![Search Results Screen]

- To select an opportunity, click the Use button next to it. Or, you can enter new search criteria and search again.
- Double-check the result: You should see the Program Number, Program Name, and Sponsor filled in for you:

![Proposal Creation Screen]

After you select the opportunity, if InfoEd is missing either the Program Number, Program Name, or Sponsor, click the Back button and instead of selecting the search SPIN you will need to search manually. Proceed with step 2. immediately below.

2. If your project is unfunded, or the opportunity is not in SPIN, select Setup Proposal Manually.

3. Click the Continue to Next Step button.
Step 2: Proposal Type
1. Select the type of proposal that you are creating:

You can use the chart below to help you determine which to select.

<table>
<thead>
<tr>
<th>Type of Application You Are Creating</th>
<th>Select this in Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>New Proposal</td>
</tr>
<tr>
<td>Transfer, Change of Grantee Institution</td>
<td>New Proposal</td>
</tr>
<tr>
<td>Competitive Renewal, Non-NIH</td>
<td>Resubmission</td>
</tr>
<tr>
<td>Resubmission</td>
<td>Resubmission</td>
</tr>
<tr>
<td>Resubmission of a Competitive Renewal</td>
<td>Resubmission</td>
</tr>
</tbody>
</table>

2. Click the Continue to Next Step button.

Step 3: Select a Sponsor

InfoEd presents a pick list of all the sponsors in the system:

This list shows all the sponsors, including the ones that use a system-to-system application and the ones that do not. You must ensure that you select the correct sponsor.

If you are submitting an application for an unfunder project, choose Icahn School of Medicine at Mount Sinai

1. Select the first letter of the sponsor’s name.
2. From the drop-down list, select the sponsor:

   **New Proposal Questionnaire**

   **Step 0**
   Confirm you intend for the PI of this proposal to be **Training, Renee S** - or - **Change PI** now please

   **Step 1**
   "New" or "Copy From Existing"?
   Create a New Proposal

   **Step 2**
   "New Competing" or "Competitive Renewal"?
   New Competing

   **Step 3**
   Select a Sponsor

   | Preferred | 0 | 9 | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |
   |-----------|---|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
   | B. Braun Medical, Inc. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Broadhead Entertainment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Broadcast Education Association | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Broadway Cares/Equity Fights AIDS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Broadrene Hartmann A/S - Broadrene Hartmanns Fond | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Bronfman (Samuel & Gladys) Family Foundation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Brook (William) Foundation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Brooklyn Community Foundation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Brooklyn Center for the Urban Environment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Brookl (Gladys) Foundation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Brooks (Marj) Foundation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Self-Support And Help Thyself Foundation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
   | Brown (Audrey and Avrom) Foundation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

   The sponsor determines if you will be creating a system-to-system or non- system-to-system submission.

   3. Click the **Continue to Next Step** button.

   **Step 5: Enter the Proposal’s Title**
   1. In the field provided, enter the title of your proposal.

   If this project will also have a lab animal or human subjects protocol, use the same title for each of them in InfoEd, so that it will be easier to correlate them with each other.

   2. Click the **Continue to Next Step** button.

   **Step 6: Start and End Dates**
   1. Enter the start date for your research. Either select it using the calendar icon next to the date field, or, enter it using one of these formats: 03/09/74, 03/09/1974, 030974, 03091974, 09-Mar-1974.

   2. If you are submitting an **IRB submission** include only the first year. ie. 01/01/2015-12/31/2015

   3. Enter the ending date for your research.

   4. Click the **Continue to Next Step** button.

   **Step 7: Years and Budget Periods**
   1. Check that InfoEd has created one budget period for each year in the project.

   2. Click the **Continue to Next Step** button.
Double Check and Create Proposal

InfoEd displays a screen where you can review the choices you made:

1. Review each of the choices that you made in the previous steps. Especially check the:
   - PI
   - Sponsor
   - Dates

2. If you need to change any choices, click No, Go back and make changes. You will be returned to the setup questions.

3. To proceed, click Yes, Create Proposal. InfoEd processes your answers, and advances you to the next page, Setup Questions (Step 8).

Setup Questions (Step 8)

The Setup Questions page displays.

At the top of the setup questions page, you will see a message that is not accurate. Don’t panic! You are about to correct this message.
### Submission Mechanism/Form Information

1. Check your Proposal Sponsor. This is the last chance that you will have to easily change the sponsor.

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**Setup Questions**

**You are creating a Final Report.**

**Instructions:**

1. Answer all questions
2. Click the "Save and Continue" button.

The tabs for your application will then appear.

For further instructions on how to prepare your application, visit the Research IT E-Learning site by clicking the ![icon](image.png) icon at the upper-left.

For technical assistance with InfoEd, email infoed@mssm.edu.

For non-technical assistance with preparing your application, contact your department's GCO Specialist or call GCO at 212-824-8200 (x58200).

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**Proposal Sponsor** is set to **Roche Laboratories, Inc.** Click [here](#) to change.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Yes" /></td>
<td><img src="image.png" alt="No" /></td>
</tr>
</tbody>
</table>

**Will you be including a Cover Letter in your proposal as an attachment?**

**Associated Departments**

- Training Department

**PI Departments**

- Training Department

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[Save and Continue]
3. Ensure that **Please select a Submission Mechanism/Screen Template** is set to the correct answer.

![Screen template options](image)

You can use the chart below to help you determine which to select.

<table>
<thead>
<tr>
<th>Type of Application You Are Creating</th>
<th>Examples</th>
<th>Select this in Step 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Grant (non-NIH)</td>
<td>New ACS Grant, New NSF Grant (Fastlane), New Industry-sponsored Basic Science Project, New DOD Contract</td>
<td>New (non-S2S, with budget)</td>
</tr>
<tr>
<td>Transfer, Change of Grantee Institution</td>
<td>Transfer of Alzheimer’s Association grant</td>
<td>New (non-S2S, with budget)</td>
</tr>
<tr>
<td>Competitive Renewal, Non-NIH</td>
<td>Competitive Renewal of an NYSDOH Grant</td>
<td>New (non-S2S, with budget)</td>
</tr>
<tr>
<td>Resubmission, Resubmission of a Competitive Renewal</td>
<td>Resubmission of an RWL Grant</td>
<td>New (non-S2S, with budget)</td>
</tr>
<tr>
<td>New Contract</td>
<td></td>
<td>New (non-S2S, with budget)</td>
</tr>
<tr>
<td>New, Internally-funded</td>
<td>New, unfunded study such as a typical resident’s research project</td>
<td>New (non-S2S, no budget)</td>
</tr>
<tr>
<td>New Study with Per-subject Reimbursement</td>
<td>Projects in which the extramural funding agency provides funding by per subject payments (e.g., Pharmaceutical sponsored multicenter clinical trial, NIH CALGB protocol)</td>
<td>New (non-S2S, no budget)</td>
</tr>
</tbody>
</table>

**New non-S2S no budget** is appropriate for new projects that are not externally funded (“MSSM” projects) and projects where all of the costs are based upon patient accrual such as cooperative clinical trials and per patient clinical trials.

**New non-S2S with budget** creates a submission with a Budget tab. You might still upload a budget for internal review. However, you must still fill out the Budget within InfoEd for the first year of the project.

**Final Report** and **Continuation** are not appropriate choices for an original submission. Do not choose either of these.
2. After selecting the mechanism, you might see a notice that “You are changing the submission mechanism...” Click OK.
3. InfoEd refreshes the page, and displays a message about the type of proposal that you have selected to create:

```
You are creating a **New** proposal containing **no budget**.

**Instructions:**

1. Choose the appropriate Screen Template, if necessary, and wait for the screen to finish loading.
2. Answer all questions.
3. Click the "Save and Continue" button.

The tabs for your application will then appear. Please note the following:

- **Personnel tab** - ignore the "Core / Panel Support" and "CV Required" checkboxes. These are not required.
- **Classification Codes tab** - click the "Add" button to include the categories applicable to your project. This is required. Your application will be returned if this tab is empty.
- You have selected a sponsor for which no budget tabs will appear. If your project does have a budget and you have selected this sponsor in error, you must first change the sponsor in the questions below before choosing the Screen Template.

For further instructions on how to prepare your application, visit the Research IT E-Learning site by clicking the ⚽ icon at the upper-left.

For technical assistance with InfoEd, email infoEdAnson.edu.
For non-technical assistance with preparing your application, contact your department’s GCO Specialist or call GCO at 212-824-8300 (x58300).
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4. For the question **Will you be including a Cover Letter...** selecting Yes creates a place to upload a cover letter into your application.

5. For the question **Will your proposal be a training grant?** Answer yes or no.

6. For **Submission Title**, you can leave this blank, as we have already provided a title previously.

7. If you chose to create a proposal with a budget tab:
a. You will be asked **Will your proposal include any Subcontractors?** Selecting **Yes** enables you to add subcontractors to the Personnel. You will not be able to add a subcontractor if you select **No** to this question.

b. You will also be asked **Will you be working with other internal departments or divisions as Subprojects?** Selecting **Yes** enables you to add subprojects to the submission. We also call this a Program Project. If you are creating a program project, see the instructions for *Creating a Subproject*, that we have posted separately.

c. You must indicate if the majority of research will be conducted on or off campus.

d. In the field labeled **Other funding information, guidelines, or restrictions**, enter any funding information that the GCO should know. You might want to copy and paste this from the funding agency’s instruction.

e. Answer the question **Does the sponsor expect any financial contribution(s) from your institution?**.

1. Click the **Save and Continue** button.

2. InfoEd creates your proposal, and displays it in a new window:
Next Steps

At this point, you can begin work on any of the other sections in your application.

If you need to change any of the Setup Questions, you can:

1. Select the Setup Questions tab.

2. Click the Completed check box to remove the check mark.

3. Redo the Setup Questions.

If you un-check the Completed check box in Setup Questions, any other sections that you have marked Completed will be un-Completed. You will need to remark them Completed.