Creating a System-to-System Supplement in InfoEd

This document highlights the differences between creating a normal Proposal submission in InfoEd, and creating a Program Project submission. It does not contain complete step-by-step instructions. You should know how to create a normal Proposal in InfoEd before using these instructions.

Follow these instructions if you are using InfoEd to submit your application system-to-system (via grants.gov/SF424 application).

Estimated Time to Complete
10 to 15 minutes.

Sections in These Instructions
I. Choosing parent award InfoEd record: Steps 1-6
II. Adding administrative information for the supplement (e.g., start and end dates of supplement): Steps 7 - 15
III. Answering InfoEd Setup Questions: Steps 16 - 25

I. Choosing parent award InfoEd record: Steps 1 - 6

1. Log in to InfoEd
2. From the menu bar on the left side of the page, click My Proposals > Show List.
3. Find your most recently funded application in the List. Do not choose an application with “PD” in the GCO # (e.g., 01-2345PD).
4. Roll your mouse pointer over the folder icon under the GCO #.
5. Click on the paper icon in the “PT” section (Not PD). This is the “Edit PT Proposal” option. Do not click on the eyeglasses icon “.” That is the “View PT Proposal” option.

   InfoEd launches a new window, called “Proposal – Summary.” In the upper left hand portion of the screen, click on the Add New PD icon.
### Additional Submission Questionnaire

This Proposal will be created with **PI Last Name, PI First Name** as the PI.

<table>
<thead>
<tr>
<th>Step</th>
<th>Copy from an Existing record:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>- Copy PI and Sponsor only</td>
</tr>
<tr>
<td></td>
<td>- Copy Basic Structure &amp; Personnel - no Budget</td>
</tr>
</tbody>
</table>

### II. Adding administrative info for the supplement (e.g., start and end dates of supplement): Steps 7 - 15

7. InfoEd launches a new window, called “Additional Submission Questionnaire” and you are now at the step entitled **Step 1 Copy from an Existing Record**. See below.

8. For supplements, the PI must remain the same as the PI on the parent award. If a user other than the PI is setting up the application, it will default as the user so you’ll need to change to the PI, as follows:

   A. Click on **Change PI**.

   B. Select the first letter of the PI’s last name.

   C. From drop down list, click the PI.
D. Click select.

InfoEd returns you to the “Additional Submission Questionnaire” window.

9. Click on Continue to Next Step button.

10. Continue to Step 2 Non Competing Renewal. Click on New Proposal from drop down menu (There is no “supplement” option). Then click on Continue to Next Step button.

11. The selected parts of the proposal will be copied, and InfoEd displays a screen where you can review the choices made.

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Copy PI and Sponsor only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>&quot;New Competing&quot; or &quot;Competitive Renewal&quot;?</td>
</tr>
<tr>
<td>Step 3</td>
<td>Selected Sponsor</td>
</tr>
<tr>
<td>Step 4</td>
<td>&quot;Tracking&quot; Number or &quot;Proposal&quot; Number</td>
</tr>
<tr>
<td>Step 5</td>
<td>Proposal’s Title</td>
</tr>
</tbody>
</table>

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

12. In Step 6 (see screenshot sample above), enter the project period dates of the supplement. In most cases, you will need to prorate the period so the supplement fits within the parent award.
For NIH grants, refer to the Notice of Award (NOA) for the End date. After entering a start and end date, click on “Continue to Next Step” button.

13. You have now proceeded to Step 7 How many years and/or budget periods would you like?

14. Click on Continue to Next Step button. You don’t need to change the # of years from the drop down menu.

15. To proceed, click on the Yes, Create Proposal button.

III. Answering InfoEd Setup Questions: Steps 16-25

16. InfoEd processes your answers and advances you to the next page, Set Up Questions (Step 8).

This is where you select the Supplement Funding Opportunity # and create the blank “System to System” application.

17. In the Submission Mechanism / Form Information section, the first sentence reads, Proposal Sponsor is set to … Click on Click here to change.

You are not clicking because you are going to change the sponsor. You are just causing the system to display a search box, where you will be able to search for the funding opportunity for this sponsor.
18. A pop up box appears stating that **Changing the proposal sponsor will cause all previous responses on the set up questions to be reset to their default state.** Click the **OK** button.

19. InfoEd launches a new window called **Sponsor / Template Selection.** See sample below.

### Sponsor/Template Selection - Sample

|---------------------------------------------------------------|-----------------------------------|

**Get Opportunity Number**
20. Click on Search SPIN/Grants.gov for Funding link.


22. Enter the funding opportunity number in the Search Grants.Gov box. Then click on the Search button.

23. Click on the Select button for the supplement’s funding opportunity. Then press OK. Shown below is an example.

24. The InfoEd screen Sponsor / Template Selection is displayed again. Now, the supplement’s funding opportunity is selected. The sponsor should have remained the same. Click on the Save button.

25. The InfoEd tab “Setup Questions (Step 8)” is displayed again. Review and answer all the questions. Note that even if your funding opportunity announcement does not have a deadline date, you must enter a date in the deadline section. Click on the Save and Continue button.

You have set up your supplement and can proceed with completing the other InfoEd tabs.