### Document Revisions

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<td>Initial Draft</td>
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<td>01/22/2014</td>
<td>1.1</td>
<td>Addenda</td>
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<tr>
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<td>1.3</td>
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1 Introduction

1.1 Scope and Purpose

This User Guide provides instructions for OSP Support Center staff and faculty for preparing a Proposal Development (PD) record to route and submit applications for internal approvals prior to submission to a sponsor as well as using the system-to-system functionality with Grants.gov for electronic submissions directly to a federal sponsor. The PD module replaces the Proposal Processing Form (PPF). The User Guide also includes instructions on the Conflict of Interest Module and the Agreements tab for recording and managing non-disclosure, material transfer, and other unfunded, research-related agreements.

All instructions included in the User Guide are required actions, in order to ensure standard practice among all OSP Support Centers. The OSP central office conducts a weekly audit of all proposal submissions to ensure consistency, accuracy, and completeness of data entry.

The InfoEd Electronic Research Administration portal is a system for the preparation, routing, institutional approval, submission, and tracking of all grant and contract requests submitted by Clemson University to external sponsors. The system also supports collecting and recording of financial conflict of interest data.

1.2 Process Overview

The InfoEd PD module enables OSP Support Center staff to create an electronic record containing all the information pertinent to a proposal submission to an external sponsor. In addition to completing data fields, users complete eForms to identify export control concerns and request approval for cost share, F&A waivers, and PI variance waivers. A form to record tuition remission provided by the Graduate School when a sponsor does not cover these costs is forthcoming. An Internal Budget Form and proposal/application documents and are also uploaded to the PD record. Fields completed in the PD module automatically populate fields in the Proposal Tracking module, including all documents uploaded.
2 Creating a New Proposal in PD

2.1 Notifying OSP Support Center of Intention to Submit

Investigators may notify OSP Support Centers of their intention to submit using their Support Center’s intake form or by completing the New Proposal Questionnaire Function in the PD module.

<table>
<thead>
<tr>
<th>Notification by Intake Form</th>
<th>PI completes intake form and submits to OSP Support Center. Tasker receives intake form, logs in to InfoEd, selects “Proposals,” and chooses “Create New Proposal.”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification by Completion of New Proposal Questionnaire</td>
<td>Login to InfoEd (infoed.clemson.edu). Select “My Proposals.” Select “Create New Proposal.” Continue with Section 2.2.</td>
</tr>
</tbody>
</table>

2.2 Completing the New Proposal Questionnaire

- Select “Change PI” by selecting Principal Investigator name from pick list. If Principal Investigator starts New Proposal Questionnaire, disregard this step.
➢ Select “Create a New Proposal” or “Copy from Existing Proposal.”

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

Create a New Proposal

Create a new proposal record.

Copy from Existing Proposal

Create a new proposal record from an existing record. Browse for or enter PPN of target proposal and check the box if all relevant attachments are to be copied also.

➢ Select opportunity.

NOTE: For all applications to the National Science Foundation, do not use “Select from Grants.gov Opportunities. Use “Setup Proposal Manually.”

<table>
<thead>
<tr>
<th>Step 1 Continued...</th>
<th>Select from Grants.gov Opportunities</th>
<th>Select from all SPIN Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Continue to Next Step</td>
<td>Continue to Next Step</td>
</tr>
<tr>
<td>Select from Grants.gov Opportunities</td>
<td>Browse for or enter Funding Opportunity Announcement (FOA) #. Uncheck S2S if opportunity is not S2S-enabled</td>
<td></td>
</tr>
<tr>
<td>Select from all SPIN Opportunities</td>
<td>Browse for opportunity; uncheck S2S if opportunity is not S2S-enabled</td>
<td></td>
</tr>
<tr>
<td>Setup Proposal Manually</td>
<td>Select this option if not a Grants.gov or SPIN opportunity.</td>
<td></td>
</tr>
</tbody>
</table>

➢ Select proposal type.

Step 2

Please Select a Proposal Type: New Proposal
Select a sponsor.

**Step 3 Select a Sponsor**

<table>
<thead>
<tr>
<th>If Grants.gov opportunity...</th>
<th>...the sponsor name will auto-populate; continue to next step.</th>
</tr>
</thead>
<tbody>
<tr>
<td>If SPIN opportunity...</td>
<td>...the sponsor name will auto-populate; continue to next step.</td>
</tr>
<tr>
<td>If manual proposal setup...</td>
<td>...enter all or part of sponsor name; select from choices provided.</td>
</tr>
</tbody>
</table>

NOTE: If sponsor is not found, select the letter “A,” and choose “A sponsor code will be entered.” OSP Support Centers should contact the InfoEd database administrator in the central OSP office to add the sponsor information.

- Enter Project Title: In textbox, enter the exact title that will be submitted to the sponsor. For Grants.gov applications, a pop-up warning box will appear if title exceeds sponsor character limitations or configuration.

  NOTE: To change a title at a later time, navigate to the Proposal Tracking Summary screen and make the change there.

- Enter start and end dates for entire project performance period (e.g., July 1, 2013–June 30, 2017).

- Verify that budget periods are accurate; change if more frequent than annual.

- Review entries in previous steps. If all are correct, select “Create Proposal,” which will create the InfoEd record for this proposal submission.

- A proposal tracking number will be assigned automatically.
The OSP Support Center Tasker subsequently receives an email notification generated by InfoEd with the subject line “Proposal Number: <PPN#> - New proposal.” As shown below, the email informs the Tasker that a PI has created a proposal to a particular sponsor and prompts the Tasker to assign the proposal to himself or herself and to the appropriate Preparer.

![Email Content]

The Tasker opens InfoEd from the hyperlink in the email.

After logging in to InfoEd, the Tasker sees the following screen:

![InfoEd Screen]

The Tasker then performs the following steps:

- Select “Assign to Self.”

- Select the Preparer under “Assign To.”

- Select “I am Done.”
The Preparer receives an email notification generated by InfoEd with the subject line “Proposal Number: ########## - New Proposal Created.” The email requests that the Preparer contact the PI to begin preparations. It prompts the Preparer to log in to InfoEd via a hyperlink to take action.

**Proposal Number: 2014000513 - New proposal created**

Harris, Daniel P <DHARRI2@clemson.edu>

Sent: Tue 6/24/2014 8:46 AM
To: Daniel Harris

Instructions: InvestigatorTEST Tester has created a proposal to Abbeville County. It has been assigned to you. Please contact the PI to begin preparations and click "I am done."

[Log in](#)

The Preparer opens InfoEd from the hyperlink in the email.

After logging in to InfoEd, the Preparer sees the following screen:

The Preparer then performs the following steps:

- Select the folder icon from “Item” on the dashboard.
- Select “I Am Done.”
Open InfoEd record from this screen using the document icon.

Principal Investigators who complete the New Proposal Questionnaire will receive a notification from their OSP Support Center on completing the remainder of the PD Module.

2.3 Completing the Set-Up Questions

- If the proposal is associated with a center or an institute, select the “Show” button at the top of the page.
- Complete the Submission Mechanism/Form Information.

<table>
<thead>
<tr>
<th>Submission Mechanism/Form Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this a flow through Project?</td>
</tr>
<tr>
<td>Yes ☐ No ☐ ?</td>
</tr>
<tr>
<td>Yes ☐ No ☐ Has your sponsor given a specific reference for this proposal? ?</td>
</tr>
<tr>
<td>☐ ☐ Is this an un-solicited application? ?</td>
</tr>
</tbody>
</table>

| Flow-through Project—Yes               | Choose “Yes” if Clemson University is applying as a subrecipient to the Prime Applicant. From the “Originating Sponsor” link, search for and select the organization to which the Prime Applicant (which will issue CU a subaward) is applying. |
| Flow-through Project—No                | Choose “No” if Clemson University is applying as the Prime Applicant. |

- Select “Save.”
Provide deadline information.

### Deadline Information

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="#" alt="Is there a Deadline for this Submission?" /></td>
<td></td>
</tr>
</tbody>
</table>

- **Deadline Type:**
  - Receipt
  - Open

- **Deadline Date:** 31-Dec-2013
- **Deadline Time:** 17:00

<table>
<thead>
<tr>
<th>Deadline Type</th>
<th>Indicate “Receipt” or “Open.”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadline Date</td>
<td>Provide date in mmddyy format.</td>
</tr>
<tr>
<td>Deadline Time</td>
<td>Provide time in 00:00 PM format (e.g., 05:00 PM).</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Eastern Standard Time is the default.</td>
</tr>
</tbody>
</table>
Select “General Proposal Properties.”

<table>
<thead>
<tr>
<th></th>
<th>Select “Yes” if you will include a cover letter with the application; InfoEd will auto-create a template.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover Letter</td>
<td>Select “Yes” if you will include a cover letter with the application; InfoEd will auto-create a template.</td>
</tr>
<tr>
<td>Human Subjects</td>
<td>Selecting “Yes” will notify the IRB Administrator.</td>
</tr>
<tr>
<td>Laboratory Animals</td>
<td>Selecting “Yes” will notify IACUC Administrator.</td>
</tr>
<tr>
<td>Associated Departments</td>
<td>If this proposal is related to a center, select “Add” and choose the applicable center.</td>
</tr>
</tbody>
</table>

Complete Approvals tab after Setup Questions are completed. OSP Support Centers are responsible for ensuring compliance data are correct. If in doubt, mark “Yes.”

Enter associated department and center information.

This action places the center in the route. Please be sure to enter the unit number of the center to receive credit for the project on the summary screen of the PT record.

Provide budget setup information.
OSP Support Centers are responsible for ensuring compliance data are correct. If in doubt, mark “Yes.”

- Complete user-defined field: Biohazards and Radiation Safety.

Selecting “Yes” will notify IBC Administrator. Complete Approvals tab after Setup Questions are completed.

- Complete user-defined field: CCIT.

Check the box if Clemson’s advanced computing resources (Palmetto Cluster, data storage, visualization, education services, or user support):

1. Have enabled the submission of this research proposal
2. Will be used for purposes of the award during the funding period.
Complete user-defined field: Health Research Partners.

- Save and continue.

2.4 Completing the Internal Documents Tab

The Internal Documents tab requires the completion of several forms and allows the upload of the complete proposal package, the guidelines, and a completed Internal Budget Form, as described below.

- Complete eForms and upload documents.

<table>
<thead>
<tr>
<th>Export Control</th>
<th>Answer all questions. If there are any “Yes” responses, check the final box.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Share/F&amp;A Waiver/PI Variance</td>
<td>To complete an eForm for cost-share, F&amp;A Waiver, or PI Variance, select the hyperlink for “Add Institution Forms/Supporting Documents.” Under “Add Initial Application Components,” check the box for the form that you need. Select “Add.” Complete the eForm. If these approvals occur only at time of Final Review, insert VPR name after PI in route.</td>
</tr>
<tr>
<td>Cost Share</td>
<td>Enter personnel names and dollar amounts of salary, fringe, or other budget category included in cost share. If necessary, enter</td>
</tr>
<tr>
<td><strong>F&amp;A Waiver</strong></td>
<td>Enter the percent F&amp;A requested (in numerical format only—do not enter the “%” sign). Enter the justification for the reduced amount. Select “Complete” in upper right-hand corner.</td>
</tr>
<tr>
<td><strong>PI Variance</strong></td>
<td>Answer the questions and upload a CV for the new PI. Select “Complete” in upper right-hand corner.</td>
</tr>
<tr>
<td><strong>Tuition Remission (forthcoming)</strong></td>
<td>If sponsor does not pay tuition, upload its written policy to the Attachments panel and complete this form.</td>
</tr>
<tr>
<td><strong>Internal Budget</strong></td>
<td>Upload the completed Internal budget Form (link available from the Internal Documents screen), detailed budget spreadsheet, and budget justification as one PDF document. Select the Category of Internal Budget and Folder as Root. If there is cost-share on the project, include the Internal Budget for the cost-share as part of the PDF upload. To combine all documents, save each as a PDF using the “Print” function and then combine into one file using the “Create PDF from Multiple Files” selection. The combined file will be named “Portfolio.” Rename as “PPN_Internal Budget” and upload as directed here.</td>
</tr>
<tr>
<td><strong>Proposal/Application</strong></td>
<td>Upload the complete proposal/application document as one document, using the “Add Institutional Forms/Supporting Documentation” hyperlink.</td>
</tr>
</tbody>
</table>
Note: Uploaded files must reflect naming conventions as specified in the InfoEd Naming Convention Document located here.

- Check the “Completed” box.

- From the picklist, select the “CS/F&A Waiver/PI Variance Route,” if applicable, and if the college business practice is to route prior to the final review. If approvals are only needed at the time of final review, insert VPR name in route, after PI. All cost-share requests must be approved by the VPR.

- Check the “Completed” box.

2.5 Completing the Approvals Tab

If the human subjects, animals, biohazardous materials, or radiation safety questions were marked “Yes” on the Setup Questions, follow these instructions:

- Select the Approvals tab.

  - Select “Add.”

  - From the dropdown list, select “Type” (biosafety, human subjects, animals, etc.)

  - Mark protocol “Not Attached.”
Select “Continue.”

Select status of “new”; then select “Save.”

The entry is now complete.

Select “Add” for additional compliance requirements and repeat previous steps.

Select “Save.”

Check the “Completed” box.
2.6 Completing the Summary Personnel Tab

For PI, enter percent effort committed to the project (calculate percent effort by dividing total salary dollars requested from sponsor and included in cost share by total institutional base salary). Percent effort is auto-populated for an S2S submission.

Biosketch and Current and Pending Support are not required. These may be uploaded with the Proposal/Application Package.

To add personnel, select “Personnel Wizard” and follow the instructions in the following table:
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Is this person appointed to your institution, or will he or she be if he or she has not yet been hired or identified?</strong></td>
<td>If “No,” will this person be a part of a subcontract on this proposal? If “Yes,” select the person’s institution from the picklist. If the institution’s name does not appear, select “Not found in this list.”</td>
</tr>
<tr>
<td><strong>Does this person currently work at your institution?</strong></td>
<td>If “Yes,” search for the individual’s name in the picklist. If “No,” indicate whether the person is “named” or is TBD. If “named,” locate the individual by clicking the first letter of his or her last name and enter the name into the text box to expedite searching. If “TBD,” select the department in which the position will reside.</td>
</tr>
<tr>
<td><strong>Personnel Type</strong></td>
<td>Choose from: Key Other Significant Contributor Non-Key Consultant—Key Consultant—Non-Key Select “Continue.”</td>
</tr>
<tr>
<td><strong>Contact Information</strong></td>
<td>In the Contact Information screen, complete all yellow-shaded fields. Role: Select from picklist. If “Other” is selected, enter description in adjacent textbox. For named individuals, their complete addresses, phones, and emails are required to advance through PD; if this information is already in GENIUS, it will auto-populate. Select “Save” and “Close” when all fields are completed.</td>
</tr>
<tr>
<td><strong>Additional Personnel</strong></td>
<td>Add as needed.</td>
</tr>
</tbody>
</table>

- Check the “Completed” box.

**NOTE:** To change the name of the PI prior to PD routing:

- Go to Setup Questions panel.
- Click “Show.”
➢ Click “Budget Periods and Setups.”

➢ Click “Save.”

➢ Go to Summary Budget panel.

➢ Select “Budget Periods and Setups.”

➢ Change the PI name.

➢ Delete former PI instead of “Keep on Project.”

➢ Select “Save.”

➢ Go to Setup Questions panel.

➢ Change associated departments by adding new PI department and moving it to Prime.

➢ Delete former PI’s department.

➢ Select “Save.”
## 2.7 Completing the Summary Budget Tab

<table>
<thead>
<tr>
<th>Project Budget Summary</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
<td>Start Date</td>
<td>End Date</td>
<td>Direct Costs</td>
<td>Indirect Costs</td>
<td>Total Project</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>01-Jan-2014</td>
<td>31-Dec-2014</td>
<td>-</td>
<td>-</td>
<td>$ 0.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>01-Jan-2015</td>
<td>31-Dec-2015</td>
<td></td>
<td>0.00</td>
<td>$ 0.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsor Budget Summary: NASA</th>
<th>Period 1</th>
<th>Period 2</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Costs</td>
<td>0.00</td>
<td></td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institution Budget Summary: Test Department</th>
<th>Period 1</th>
<th>Period 2</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Costs</td>
<td>0.00</td>
<td></td>
<td>$ 0.00</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
</tbody>
</table>

### Steps:

- Enter direct and indirect costs for total project:

<table>
<thead>
<tr>
<th>Sponsor Budget Summary</th>
<th>Enter total direct costs and F&amp;A requested from sponsor for each budget period.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Budget Summary: College of . . .</td>
<td>Enter total of all cost-share and waived F&amp;A for each budget period.</td>
</tr>
<tr>
<td>Institutional Budget Summary</td>
<td>DO NOT USE.</td>
</tr>
</tbody>
</table>

- Check the “Completed” box in the upper right-hand corner.

- Select “Done.”
3 Routing PD Record for Final Approval

3.1 Submission by Preparer/PI for Preliminary Review

➢ Select Finalize tab.

➢ Click the thumbs-up icon labeled “Submit Final Review.”

➢ Select “Submit.”

➢ Enter any comments for other reviewers to see.

➢ Preparer receives email notification requiring his or her approval.

➢ Open the link to the Reviewer Dashboard and select the “Save” icon.

➢ From the dropdown menu, select “Approved.”

➢ Select “Save.”

➢ Exit from the record.
3.2 Preliminary Review by Approver

Upon receiving email notification of an action item to review, the Approver clicks on the “Reviewer Dashboard” link from within the email to view the following screen:

- Select the Review tab.
- Open each item on the dashboard. Record any areas that need to be corrected in the “To be shared with everyone” text box.
- Select “Approved” or “Return for Corrections” from list.

NOTE: If “Return for Corrections” is selected, route will return to Preparer via email notification. Once corrections are made, Preparer submits to Final Review again, as described above.
Click the floppy disk icon in the upper right-hand corner to save the data.

NOTE: If it is not approved, Preparer is instructed to review comments at bottom of Routing Progress screen, make corrections, and then resubmit for final review.

NOTE: Three conditions require additional actions:

<table>
<thead>
<tr>
<th>Cross-college Applications</th>
<th>Insert the name of the OSP support center manager for the Co-investigator’s college after the Principal Investigator step.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated Center or Institute</td>
<td>Insert the name of the center or institute</td>
</tr>
</tbody>
</table>

Email notifications are sent to the PI, co-PI, department chairs, and ADRs after each electronically approves the application. When all approvals are in, the OSP Support Center receives the notification that the application may be submitted to the sponsor.

3.3 Instructions for PIs: Routing the Proposal for Institutional Approval and Submission

- Open email notification that a submission requires review and approval.
- Select “Reviewer Dashboard” link in email.
- Select Review tab.
➢ View the InfoEd Proposal Development record by clicking the “View” button; view all other proposal documents by clicking the “Edit” button.

NOTE: Cost share commitments are included on the Cost Share eForm; allocations/credit are included on the Internal Budget form.

➢ Select the radio button in the “Reviewed” column for each document that is approved.

➢ Click the floppy disk icon in the upper right-hand corner of the screen to save the data.

➢ From the picklist labeled “My Decision Is,” select “Approved” (if not approved, email notification is sent to Preparer).
Selecting “Return for corrections” will send a generic email to the PI and applicable college Preparers notifying them of the return. The Preparer should address any issues and on the Finalize tab select the “continue review” thumbs-up icon. The review route will then start again from the beginning step.

Read certifications that display. Select “Accept” or “Decline.”

Click the floppy disk icon in the upper right-hand corner of the screen to save the decision.

Approval process complete. Close out of screen.

3.4 Instructions for Chairs and Associate Deans: Approving Proposal Submission

NOTE: In order to ensure timely processing, InfoEd will automatically move the route to a delegate if either the department chair or ADR does not respond within 2 days if the application due date is in 2 days.

Open email notification that a submission requires review and approval.

Click on the “Reviewer Dashboard” hyperlink in email to get to the following screen:
➢ To see who the Preparer is or check the status of previous reviewers, check the Route tab.

➢ When ready to conduct the review, select the Review tab.

➢ View the InfoEd PD record by clicking the “View” button; view all other proposal documents by clicking the “Edit” or “View” button (depending on access).

NOTE: Cost share commitments are included on the Cost Share eForm; allocations/credit percentages are included on the Internal Budget form.

➢ Select the radio button in the “Reviewed” column for each document that is approved.
Click the floppy disk icon in the upper right-hand corner of the screen to save the data.

Enter all comments in the “Between Reviewers Only” textbox. Comments can be viewed by scrolling to the bottom of the Routing Status screen on the Finalize tab.

From the picklist labeled “My Decision Is,” select “Approved” (if “Returned to PI” is selected, an email notification is sent to the Preparer).

Selecting “Return for corrections” will send a generic email to the PI and applicable college preparers notifying them of the return. The Preparer should address the issues in PD and on the Finalize tab select the “continue review” thumbs-up icon. The review route will start again.
➤ Click the floppy disk icon in the upper right-hand corner of the screen to save the decision.

➤ Approval process complete. Close out of screen.
4. Data Entry in Proposal Tracking Module

- Click “PT Edit” icon.
- Open Summary panel.
- Change status to “Pending.”
- Enter submission date.
- Verify prepopulated information (cost share, conflict of interest, title).
- Add center/institute department number.
- Enter F&A rate information (DHHS/Sponsor/Applied).
- Enter preparer name.
- Enter approver name.
- Select emphasis area.
- Mark all checkboxes that apply (e.g., K–12, GHS, etc.).
- Select “Save.”
- Open Sponsor panel.
- Enter ID number and/or program or verify prepopulated information is correct.
- Enter CFDA number, if applicable.
- Enter instrument type.
- Enter funding source (subclass) on Sponsor panel.
- Enter project location information if your college uses this field.
- Select “Save.”
- Open Personnel tab.
- Enter allocations/percent credit.
- Select “Save.”
- Open Budget panel.
- Enter department to budget number.
- Check box for GAD, if applicable.
- Verify budget information is correct.
- Select “Save.”
- Open Attachments panel.
- For S2S submissions, in the Folder dropdown menu select “Proposal”; in the Category dropdown menu, select “Supporting Documents.”
- For non-S2S proposals, complete Activity Log with submission confirmation information, if provided by sponsor. Upload any documentation to Attachments panel named “Confirmation.”
- For non-S2S proposals, add the compiled proposal (with cover letter and proposal number [Fastlane/NSPIRES]) to “Supporting Docs” category and “Proposal” folder.
- REMINDER: All file name attachments must comply with file-naming conventions noted here.
5. Using InfoEd for Internal CU Funding Competitions and Student Project Agreement Proposals

5.1 Internal CU Funding Competitions

5.1.1 University Research Grant Program

- Create and complete an InfoEd PD record for a URGC proposal submission, per standard instructions described in this manual, with these modifications:

- Select “Clemson University” as the Sponsor.

- When entering PT data, on the Sponsor tab, select “URGC” from the “Instrument” drop-down field.

- On the Summary panel tab, change status to “URGC PI Applied” (for Project Initiation proposals) or “URGC – PC Applied” (for Project Completion proposals). OSP will change the status for those that are funded at the award stage.
5.1.2 Brooks Sports Science Institute Seed Grants Program

Follow the same procedure as for the URGC, but select “BSSI: Applied” from the Status table and “BSS” from the Instrument field on the Sponsor panel.

5.1.3 Technology Maturation Fund

Follow the same procedure as for the URGC, but select “TMF: Applied” from the Status table, “TMF” from the Instrument field on the Sponsor panel, and “CURF” as the Sponsor.

5.2 Sponsored Student Project Agreements

Create and complete an InfoEd PD record, per standard instructions described in this manual, with these modifications, but when entering PT data, on the Sponsor tab, select “Sponsored Student Project Agreement” from the Instrument field.
6 OSP Agreements

➢ Log into InfoEd.

➢ Click “My Proposals.”

➢ Click “Create New PT Record.”

➢ Choose “New Proposal” and click “Continue.”
- Search for PI by last name and click “Continue.”

- Search for sponsor and click “Continue.” Note: sponsors not included in list must be added by CU InfoEd administrators.
- Click “PT” icon under “Open.”

- Change proposal type to “OSP Agreement” and click “Save.”
- Click “Status.” Select “OSP Agreement Negotiation” and click “Add.”

- Click “Agreements” subfolder (Not “Agreements” folder).
➢ Click “Create New” to start new agreement entry.

➢ Choose “Agreement Type” from dropdown list. Click “Save.”
Enter sponsor name in “Institution Name” and contact information in “Custom Field” areas.

Add comments as needed; first comment should generally be how PI would like contract communications to be handled.
➢ Change agreement status to “Pending” and click “Add.”

➢ Click “Add” under “Document Summary” to add contract documents.
- Name file, choose file to upload, and click “Upload.”

- Once document is uploaded, click “View Latest” to open.
➢ To send email via InfoEd, click “Communications.”

Click “Send Email.”
Click “To” to choose email recipient; search for and choose recipient(s) from list; then click “Select.” When recipients are chosen, click “Save” and “Close.”

Enter subject line and email text, add attachments as necessary, and click “Send.”
When agreement is fully executed, add (1) agreement effective date in “Agreement From,” (2) end date in “Agreement To,” and (3) date of last signature in “Date Signed” area.

Use the “Agreement Conditions” section to enter any notes about the agreement’s terms.
➢ Change agreement status to “Completed” under “Agreement Status History” and click “Add.”

➢ Click “OSP Agreement” and change status to “OSP Executed Agreement.”
7. Appendices

7.1 Glossary of Terms

**Allocation** – The percent credit of project costs assigned to personnel on a proposal submission; recorded on the InfoEd PT Personnel Tracking panel. All allocations must total to 100 percent among all project personnel.

**Approver** – An individual within an OSP Support Center who reviews and approves/rejects applications submitted for preliminary approval by a Preparer.

**Cost Share** – Project costs to be paid for by Clemson University.

**Effort** – The percentage of time an investigator commits to a project. This cannot exceed 100 percent.

**eForm** – The Export Controls Form or Cost-Share/F&A Waiver Request/PI Variance Request that appear on the Internal Documents panel. These forms must be completed before a PD record can be routed for Preliminary or Final Review.

**F&A Waiver Request** – Request permission to not include the full amount of indirect costs allowable on a project.

**Final Review** – Assessment by PI, Co-Investigators, Department Chairs, and Associate Deans for Research that proposal is approved to be submitted to sponsor.

**InfoEd Electronic Research Administration** – The system of record for the preparation, routing, institutional approval, submission, and tracking of all grant and contract requests submitted by Clemson University to external sponsors. The system also supports collecting and recording of financial conflict of interest data for Clemson University investigators who apply to the Public Health Service.

**InfoEd Proposal Development Module** – The electronic function allowing for electronic routing of all outgoing sponsored project proposals for institutional review and approval and system-to-system transmission to sponsors for all Grants.gov applications.

**InfoEd Proposal Tracking Module** – Database of elements to track and maintain information on all sponsored proposal submissions and awards.

**Institutional Approval** – Permission by representatives of departments, colleges and the university (via the Office of Sponsored Programs).

**Intake Form** – Any email form or document utilized by an OSP Support Center to receive notifications from PIs on the intention to submit a grant application.

**Internal Budget** – The budget spreadsheet listing Clemson University budget categories that is a required document for institutional review and approval of proposal submissions.
Office of Industrial Contracts (OIC) – Responsible for reviewing all sponsored research proposals to private industry, negotiating contract terms and conditions, and ensuring that agreements are in accord with university policies and procedures as well as federal regulations and requirements.

OSP Support Center – A college-based pre-award team that assists with application preparation, review, and submission.

Preliminary Review – Initial review of an application by an OSP Support Center Approver prior to submission for Final Review.

Preparer – OSP Support Center staff member who assists faculty with the assembly of an application.

PI Variance Approval Request – Request to assign as PI an individual with an ineligible PI status as described in the Assignment of PI Policy.

Principal Investigator (PI) – An eligible CU employee who assumes the responsibility for the scientific, programmatic, and financial conduct of a sponsored research project.

Student Projects – Externally funded projects completed by a student to fulfill the requirements of a course.

Subclass – The specific designation of Sponsor Type that corresponds to CU’s Chart of Accounts. This listing is available on the Grants and Contracts Administration website.

Tasker – An OSP Support Center staff member with responsibility to assign a Preparer in his/her college to assist with a particular grant application.

University Research Grant Committee (URGC) Program – A mechanism by which intramural grants are awarded to faculty.
7.2 List of Acronyms

**BSSI** – Brooks Sports Science Institute

**F&A** – Facilities and Administrative Cost Waiver

**PD** – InfoEd Proposal Development Module

**PI** – Principal Investigator

**PPF** – Proposal Processing Form

**PT** – InfoEd Proposal Tracking Module

**TMF** – Technology Maturation Fund

**URGC** – University Research Grant Committee
7.3 InfoEd Reviewer Dashboard Reference Guide

*Important: To complete a review from home or off the Clemson network, first establish a VPN connection ([https://cuvpn.clemson.edu](https://cuvpn.clemson.edu)) to reach the reviewer dashboard.

The Reviewer Dashboard allows viewing and approval of the various elements of the proposal submission package. The first indication that review and approval are required will be an email similar to the one below.

```
From: Sysadmin, InfoEd <dharr2@clemson.edu>
To: Daniel Harrs
Cc: 
Subject: Proposal Submitted - Your Approval Required

Please review the proposal listed below by clicking the Reviewer Dashboard link.

Investigator: Investigator
Department: Test Department
Sponsor Deadline Date: 
Proposal No: 2014000192
Proposal Title: dh test 2/19/14 5

Reviewer Dashboard: Reviewer Dashboard
```

**Step 1**

- Click on the Reviewer Dashboard link in the email. A window will open displaying the Reviewer Dashboard itself.

- Log in with Clemson University username and password.
Step 2

➢ To view Preparer’s name, click on the Route tab. The Preparer is the first person in the route.

➢ To begin the review, click on the Review tab. This brings up the screen shown below.

![Image of Screen](image.png)

This screen consists of:

- **Elements of the application to review.** To review each element, click “View” (or “Edit” if your access allows).

- **Comments.** Enter comments in the block labeled “To be shared with everyone. Text entered here will be displayed in both the upper right corner of the Reviewer Dashboard and on the Route Status page of the Proposal Development Record.
- **Decision.** Either “Approved” or “Return for Corrections.”

**Step 3**

- Click the “View” button for each element of the proposal.
- Select the “Reviewed” or “Not Applicable” radio button for each element.
- If any element is left as “Un-reviewed,” then no decision can be recorded.

NOTE: “Percent Credit” information appears on the bottom of the Internal Budget.

- Comments may be left in the applicable section (see “Comments” bullet above).

**Step 4**

- Click the “Save” icon in the upper right corner of the dashboard.

**Step 5**

- Enter decision.
A selection of “Approved” will send the review to the next step of the route for approval.

A selection of “Return for Corrections” will send a preset email to the PI and grant administrator notifying them that corrections are needed. Specific concerns/corrections should be communicated through the Comments section or sent to the PI and grant administrator directly. Once the corrections have been made, the route will start again from the beginning.

After a decision is recorded, certification text will appear to the user if he or she is the proposal’s PI, Co-investigator, PI or Co-I’s Chair, or Associate Dean for Research. The user must agree in order to approve the review.

**Step 6**

- Read and accept or reject certification text.

**Step 7**

- Click the “Save” icon once more to complete review.

- To verify that your decision was recorded, select the Route tab. Your name, role, decision and decision date should appear.
7. Index