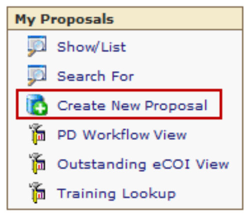
# Submitting Innovation Proposals via InfoEd PD

The process to submit Innovation proposals via InfoEd PD will not be unfamiliar to current users of the application. With this release users will now have the option of selecting Innovation as the office to submit their application to.

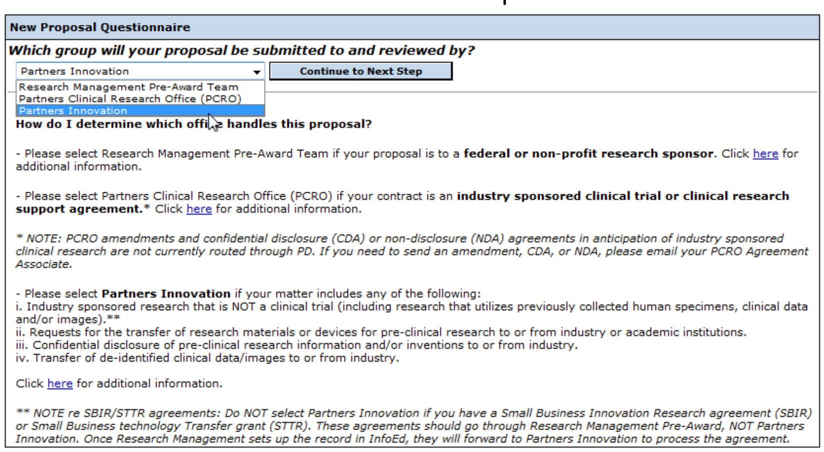
## Creating a New Proposal

1. Click the "Create New Proposal" link in the left navigation. If a you do not have this link you can request access to the application via [Research Applications Security (RAS)].



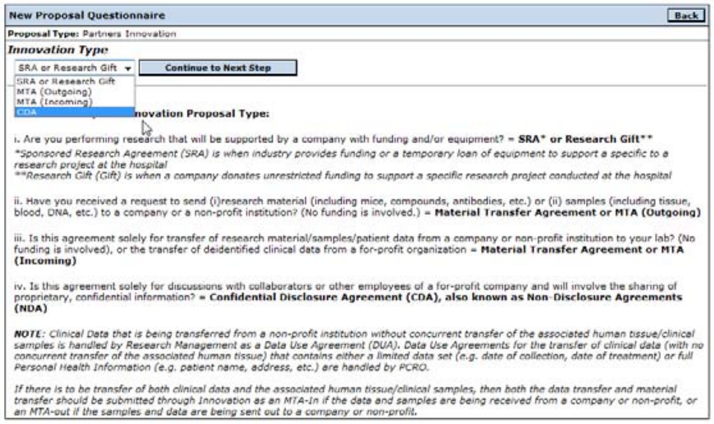

2. You will initially be presented with an option to select the office to submit your application to: Research Management Pre-Award Team, Partners Clinical Research Office (PCRO) or Partners Innovation. Included below the options is a definition of each office and the types of proposals submitted through them.

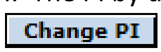
   Make a selection and click the "Continue to Next Step" button



3. After selecting Partner Innovation as the submitting office, you will be presented with a secondary question to select the type of Innovation proposal you are submitting. Included below the options is a definition of each type of Innovation proposal.

   Make a selection and click the “Continue to Next Step” button




4. Confirm the PI. The PI by default will be the person creating the proposal. To change the PI:
   a. Click 

   b. In the “Search for a particular entry” field type in the name of the PI, last name first.
   c. Choose the PI from the dropdown being sure to confirm the NT login for the PI.
   d. Click Select.

   The PI will be updated in the header and at Step 0.

5. Select “Create a New Proposal” and click the “Continue to Next Step” button


6. Select a Sponsor
   a. Select the first letter in the sponsor’s name
   b. In the “Search for a particular entry” field type in the name of the sponsor.
   c. Scroll through the list of sponsor selections and choose the appropriate sponsor in the dropdown
   d. Click the “Continue to Next Step” button

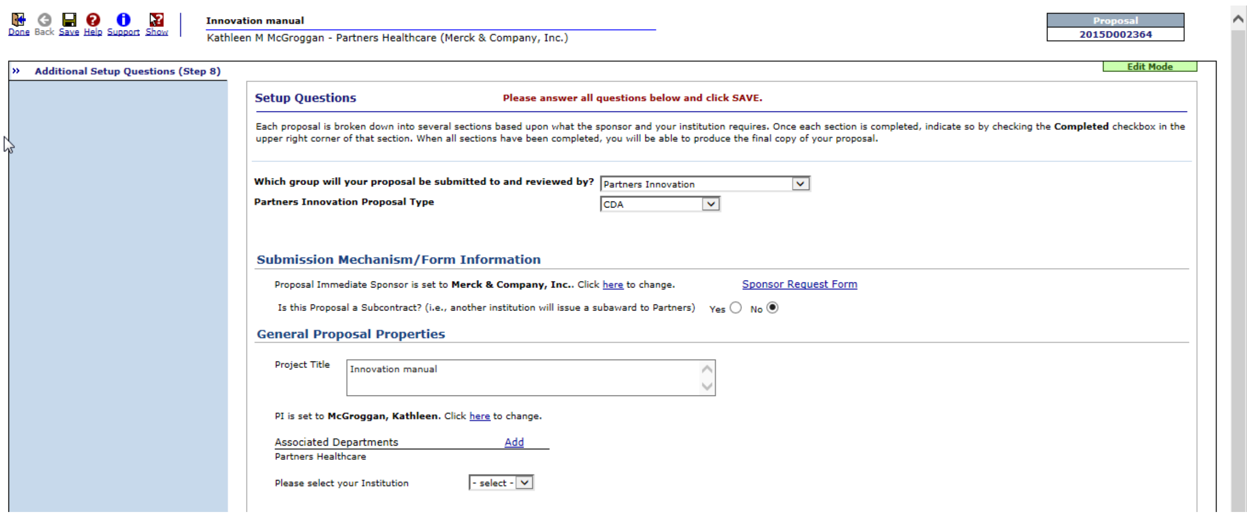

❖ *Note that there may be many variations of one sponsor name in the system based on funding.*

❖ *If your sponsor cannot be found please click the Sponsor Request Form to complete the necessary sponsor information and have the sponsor added to InfoEd, Insight and PeopleSoft.*

7. Enter the Proposal's Title. Type the title of the proposal into the textbox. The title may be up to 1,000 characters in length.


8. Verify the Information is correct and click "Yes, Create Proposal"

Your proposal will begin processing and generate a proposal ID number. When completed, you will be taken to the Additional Setup Questions page.



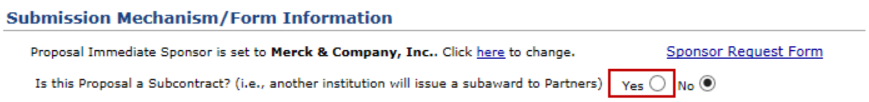
## Additional Setup Questions Page

Most of the information on this page will already be completed based on your initial answers, however, this page will allow you to edit particular information later if needed as well as complete some final data points.

1. Confirm/update the Innovation proposal type

2. Confirm/update the Immediate sponsor

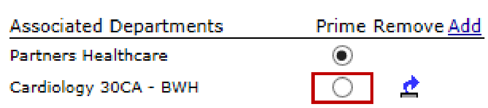
3. If you are serving as a subcontract to another institution for this submission, you will need to add an originating sponsor to the proposal. Change this radio button option to Yes and you will be prompted to select a sponsor.




4. Confirm/update the submission Title

5. Confirm/update the PI

6. Confirm/update the Associate Department. The associated department automatically defaults to the PI's primary Chief of Service Code listed in InfoEd. To change:
   a. Click the "Add" link. The department selection popup window will open.
   b. Expand the window in the area labeled "Pick from tree view:"
   c. Expand the hospital and departments by pressing the + sign to the left until the appropriate division can be selected.
   d. Click the radial button to the right of the appropriate department.
   e. Click the Select button in the top right corner.
   f. The proposal window will refresh and the new department will be listed.
   g. Click the "Prime" button for the new department to make the change in the system. Click Save at the top of the page.



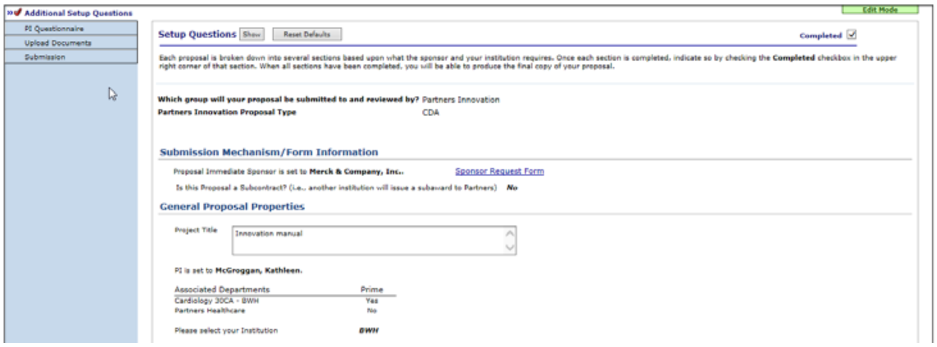

   h. Select the remove icon to remove the original department.

❖ *Note: It is critical that the Associated Department is accurate to ensure the proper departmental contacts are informed of and able to access this proposal once it is created. The Associated Department code listed here should reflect the department or division that the proposal should be approved by.*

7. Select your institution


8. Click the Save button in the top left corner of the page.

The Additional Setup Questions page will be marked complete automatically and you will be taken to the next tab in the application.




If you need to make changes to any of the information in the future just uncheck the page as complete, make the necessary edits and click the Save button.

## PI Questionnaire

The PI Questionnaire will present different questions per Innovation proposal type. Each question marked with the red * is required to be completed but please note that secondary questions may need to be completed based on your response to a required question. Please be sure to read each question clearly.

Answer each question by entering data or selecting an option from the presented dropdown. Click the "Save" button in the top left corner to save your answers periodically or when the form is done.

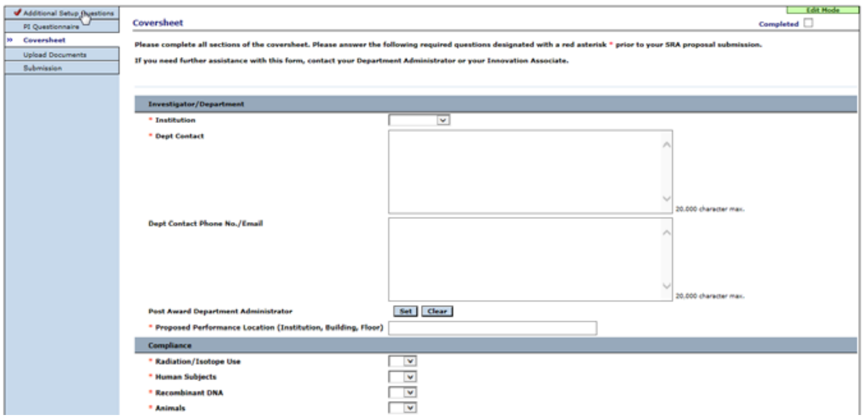

Once all questions are complete click the "Completed" checkbox in the top right corner. If you failed to answer a required question then you will not be able to check this box and will be prompted with the question that needs to be answered.

**Please note that for any questions with the "Add" option (#2 for the CDA, # ) be sure to SAVE previous answers on the page before clicking the Add link.**

## Coversheet (SRA Only)

For SRA proposals users need to complete the Coversheet tab. This page pertains to Partners Compliance and contact information that is required for funded proposals.

Answer each question by entering data or selecting an option from the presented dropdown. Click the "Save" button in the top left corner.

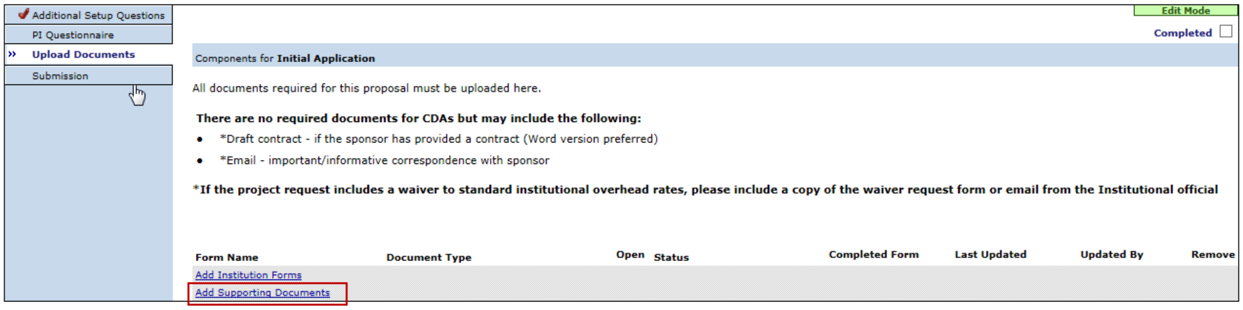



Once all questions are complete click the "Completed" checkbox in the top right corner. If you failed to answer a required question then you will not be able to check this box and will be prompted with the question that needs to be answered.

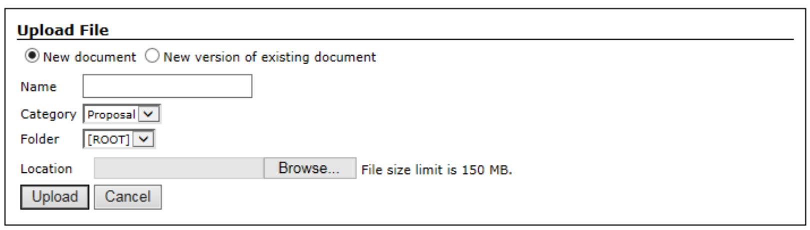
# Upload Documents

Documents pertaining to the submission should be attached to the Upload Documents tab.  For each Innovation proposal type a list of required or recommended documents is listed.

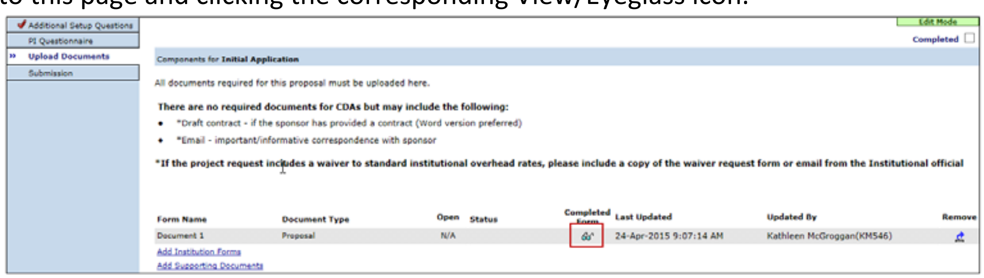
To add a document, click the “Add Supporting Documents” link.




In the popup enter a name for your document.  Click the “Browse” button to locate the file on your computer.  Click the “Upload” button.  Repeat for as many documents as needed.




You can view documents you or other team members have attached to the submission at any time by navigating to this page and clicking the corresponding View/Eyeglass icon.

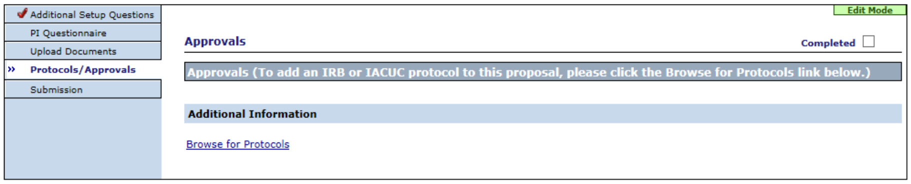


Once you have added all necessary documentation click the “Completed” checkbox in the top right corner.

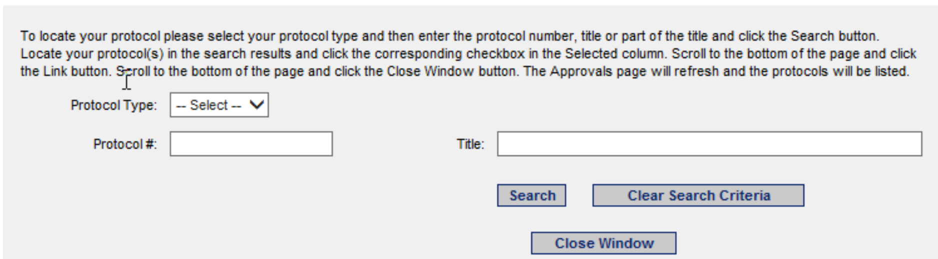
## Protocols/Approvals (MTAs Only)

For MTA (Incoming) and MTA (Outgoing) proposals users have the option to add a link to their IRB or IACUC protocol in the application.  This is not a required entry for MTAs.

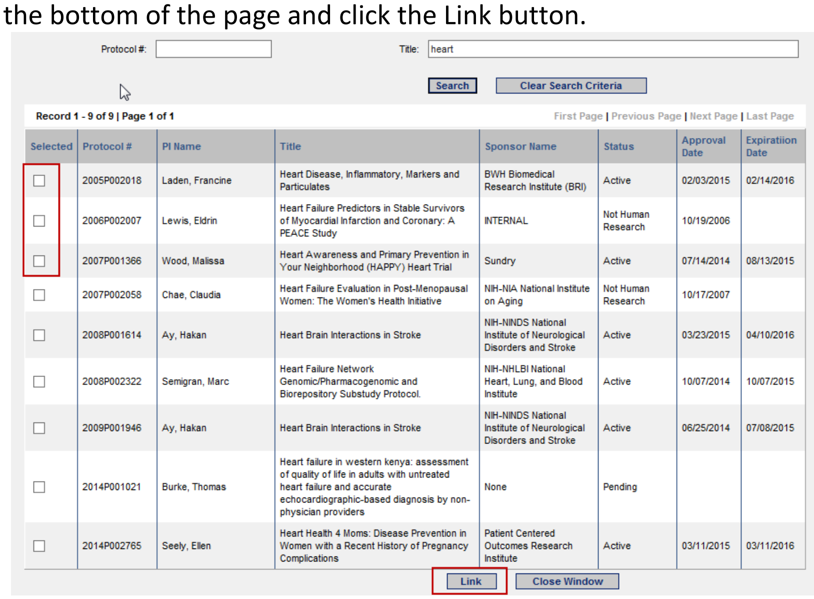
Click the “Browse for Protocols” link. A popup will open to locate your protocol.




To locate your protocol please select your protocol type and then enter the protocol number, title or part of the title and click the Search button.




Locate your protocol(s) in the search results and click the corresponding checkbox in the “Selected” column.  Scroll to the bottom of the page and click the Link button.



Protocol #: Title: heart

Search | Clear Search Criteria

Record 1 - 9 of 9 | Page 1 of 1 First Page | Previous Page | Next Page | Last Page

| Selected | Protocol # | PI Name | Title | Sponsor Name | Status | Approval Date | Expiratiion Date |
|---|---|---|---|---|---|---|---|
| ☐ | 2005P002018 | Laden, Francine | Heart Disease, Inflammatory, Markers and Particulates | BWH Biomedical Research Institute (BRI) | Active | 02/03/2015 | 02/14/2016 |
| ☐ | 2006P002007 | Lewis, Eldrin | Heart Failure Predictors in Stable Survivors of Myocardial Infarction and Coronary: A PEACE Study | INTERNAL | Not Human Research | 10/19/2006 | |
| ☐ | 2007P001366 | Wood, Malissa | Heart Awareness and Primary Prevention in Your Neighborhood (HAPPY) Heart Trial | Sundry | Active | 07/14/2014 | 08/13/2015 |
| ☐ | 2007P002058 | Chae, Claudia | Heart Failure Evaluation in Post-Menopausal Women: The Women's Health Initiative | NIH-NIA National Institute on Aging | Not Human Research | 10/17/2007 | |
| ☐ | 2008P001614 | Ay, Hakan | Heart Brain Interactions in Stroke | NIH-NINDS National Institute of Neurological Disorders and Stroke | Active | 03/23/2015 | 04/10/2016 |
| ☐ | 2008P002322 | Semigran, Marc | Heart Failure Network Genomic/Pharmacogenomic and Biorepository Substudy Protocol. | NIH-NHLBI National Heart, Lung, and Blood Institute | Active | 10/07/2014 | 10/07/2015 |
| ☐ | 2009P001946 | Ay, Hakan | Heart Brain Interactions in Stroke | NIH-NINDS National Institute of Neurological Disorders and Stroke | Active | 06/25/2014 | 07/08/2015 |
| ☐ | 2014P001021 | Burke, Thomas | Heart failure in western kenya: assessment of quality of life in adults with untreated heart failure and accurate echocardiographic-based diagnosis by non-physician providers | None | Pending | | |
| ☐ | 2014P002765 | Seely, Ellen | Heart Health 4 Moms: Disease Prevention in Women with a Recent History of Pregnancy Complications | Patient Centered Outcomes Research Institute | Active | 03/11/2015 | 03/11/2016 |

Link | Close Window

Scroll to the bottom of the page and click the Close Window button. The Approvals page will refresh and the protocols will be listed.

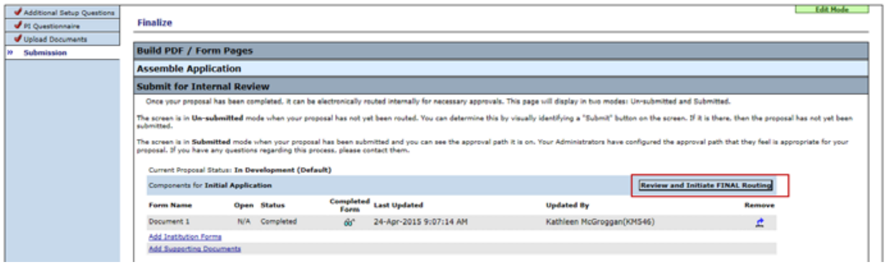
This forms an automatic link between the proposal and the protocol in Insight.  You can click on the protocol number to be taken to the information regarding it in Insight.

Once you have added protocols or if you do not have any to add, click the “Completed” checkbox in the top right corner.

## Submission

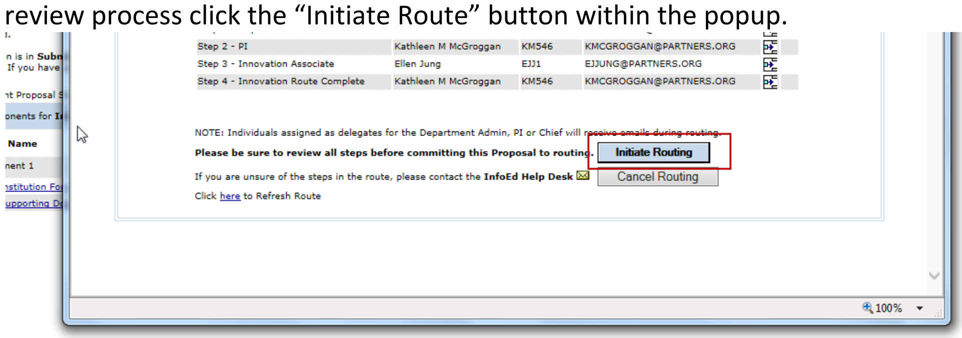
Once you have completed all of the necessary tabs and attached your documentation the proposal will need to be reviewed and approved by the necessary parties.

Go to the Submission tab. Click on the “Review and Initiate Final Routing” button.




A popup will open with the steps of the signoff process listed. Individuals in the process will get an email which takes them to a review page containing proposal information and links to documents and the proposal itself. Each steps needs to be completed for the proposal to move to the next step. The PI will also be asked to signoff on the PI Assurance.

To start the review process click the “Initiate Route” button within the popup.




For more information on the routing process please [click here](#).