

### AGREEMENT ASSIGNMENT MATRIX

Agreement Type	Description	Department Responsible for the Agreement	Additional Information
Industry-Funded: Clinical Trial Agreement (CTA), Clinical Services Agreement (CSA)	<p>A CTA or CSA that is <i>industry-funded</i> and involves human subject research. These may be either industry- or investigator-<i>sponsored</i> studies. Examples include:</p> <ul style="list-style-type: none"> <li>• Investigational drug or device studies</li> <li>• Post-market studies</li> <li>• Medical record reviews</li> <li>• Observational studies</li> <li>• Registries</li> <li>• Industry funded multi-site incoming subawards</li> <li>• Research Collaboration Agreements</li> <li>• Amendments</li> <li>• Master Agreements</li> <li>• Ancillary agreements related to the above list</li> </ul>	<p><b>Department:</b> Clinical Research Administration Office (CRAO)</p>	<p><b>Required Documents:</b></p> <p>(1) Protocol,                      (2) Editable version of the Contract, and                      (3) Sponsor Contact Information</p> <p><b>Intake System:</b> Info Ed (era.cu.edu). See Attachment for Instructions.</p>
Compassionate Use, or Expanded Use/Emergency Use INDs/IDEs, or Humanitarian Use Device/Exemption (HUD/HDE)	<p>This type of agreement covers the terms of treatment using an unapproved drug or device <i>outside a clinical trial</i>.</p>	<p><b>Department:</b> CRAO</p>	<p><b>Required Documents:</b></p> <p>(1) Protocol,                      (2) Editable version of the Contract, and                      (3) Sponsor Contact Information</p> <p><b>Intake System:</b> Info Ed (era.cu.edu). See Attachment for Instructions.</p>
Material Transfer Agreements (MTAs)	<p>A MTA is an agreement that covers the transfer of material from one entity to another. This includes projects where UCD is sending or receiving material.</p> <p><b>**Many agreements could be labeled as MTAs, however, the scope of work may go beyond</b></p>	<p><b>Department:</b> CRAO</p>	<p><b>Required Documents:</b> The web-based form below will guide you to the appropriate attachments.</p> <p><b>Intake System:</b>  <a href="https://forms.ucdenver.edu/secure/rss_ra_ogc_ra">https://forms.ucdenver.edu/secure/rss_ra_ogc_ra</a></p>

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	what a MTA should cover. If the scope of work involves joint publication, shared analysis, and/or shared data, please contact CRAO to discuss the appropriate agreement mechanism.		
Confidentiality Disclosure Agreements (CDAs) / Non-Disclosure Agreements (NDAs)	A CDA/NDA is an agreement between at least two parties that outlines confidential material, know, or information that the parties wish to share with one another for a specific purpose, but wish to restrict access to or by third parties.	<b>Department:</b> CRAO	<b>Required Documents:</b> (1) Editable version of the Contract, and  <b>Intake System:</b> <a href="https://forms.ucdenver.edu/secure/rss_ra_ogc_ra">https://forms.ucdenver.edu/secure/rss_ra_ogc_ra</a>

Agreement Type	Description	Department	Additional Information
<p>All other Contracts/ Grants (other than those above) related to Sponsored Projects</p>	<p>This includes Industry contracts without Human Subjects and Non-Industry contracts (including government and non-profit) with/without human subjects. Examples include::</p> <ul style="list-style-type: none"> <li>• Sponsored Research Agreements (SRAs)</li> <li>• Grants</li> <li>• Master Agreements</li> <li>• Incoming Subawards/Subcontracts</li> <li>• Fellowships</li> <li>• Interagency Agreements</li> <li>• Collaboration/Consortium Agreements</li> <li>• Amendments</li> <li>• No Cost Extensions</li> <li>• Ancillary agreements related to the above list</li> </ul>	<p><b>Department:</b> Office of Grants and Contracts</p>	<p><b>Required Documents:</b> (1) Protocol, <i>if applicable</i>, (2) Editable version of the Contract, and (3) Sponsor Contact Information</p> <p><b>Intake System:</b> Info Ed (era.cu.edu). See Attachment for Instructions.</p>
<p>Outgoing Subcontracts</p>	<p>An outgoing subcontract is an agreement made between CU Denver and another institution or organization to perform an intellectually significant portion of the SOW (Statement of Work) under a CU Denver sponsored project.</p> <p>*This is distinct from agreements in which CU Denver is purchasing good or services (see Outgoing vendor/procurement agreements below).</p>	<p><b>Department:</b> Office of Grants and Contracts</p>	<p><b>Required Documents:</b> (1) Subcontract request form (2) Subrecipient commitment form (if applicable)</p> <p><b>Intake System:</b> (1) Send via email to <a href="mailto:OGC.Subcontracts@ucdenver.edu">OGC.Subcontracts@ucdenver.edu</a></p> <p><b>More Information:</b> <a href="http://www.ucdenver.edu/research/OGC/Pages/subcontracts.aspx">http://www.ucdenver.edu/research/OGC/Pages/subcontracts.aspx</a></p>

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<p>Revenue/Fee For Service Contracts</p>	<p>This includes agreements related to revenue generating activities for CU Denver. Examples include:</p> <ul style="list-style-type: none"> <li>• Consulting/Professional Service agreements not subject to the Member Practice Agreement (please check with your department administrator if you are unsure what this means)</li> <li>• Letters of Agreement/other contracts related to CU Denver hosted/accredited courses/programs/conferences</li> <li>• Internal Facility/Lab Use Agreements</li> <li>• Revenue agreements for on-campus service centers</li> <li>• External Building Use Agreements</li> <li>• Sponsorship Agreements</li> <li>• Amendments</li> <li>• Masters</li> <li>• Ancillary agreements related to the above list</li> </ul>	<p><b>Department:</b> Office of Grants and Contracts</p>	<p><b>Required Documents:</b></p> <ul style="list-style-type: none"> <li>(1) Contract</li> <li>(2) Sponsor contact email</li> </ul> <p><b>Intake System:</b></p> <ul style="list-style-type: none"> <li>(2) Send via email to TK Keith via <a href="mailto:Thomas.KeithIII@ucdenver.edu">Thomas.KeithIII@ucdenver.edu</a></li> </ul>
<p>Equipment Loan Agreements</p>	<p>This involves the loaning of equipment from one entity to another. This includes both agreements where CU Denver is loaning equipment or when CU Denver is borrowing equipment.</p>	<p><b>Department:</b> Office of Grants and Contracts</p>	<p><b>Required Documents:</b></p> <ul style="list-style-type: none"> <li>(1) Contract</li> <li>(2) Sponsor contact email</li> </ul> <p><b>Intake System:</b></p> <ul style="list-style-type: none"> <li>(1) Send via email to TK Keith via <a href="mailto:Thomas.KeithIII@ucdenver.edu">Thomas.KeithIII@ucdenver.edu</a></li> </ul>
<p>Outgoing Vendor/Procurement Agreements</p>	<p>This includes agreements where CU Denver is paying another entity/individual for goods or services.</p>	<p><b>Department:</b> Procurement Service Center (PSC)</p>	<p><b>Required Documents:</b></p> <ul style="list-style-type: none"> <li>(1) Contract from Vendor if provided</li> <li>(2) Creation of Marketplace requisition</li> </ul>

			<b>Intake System:</b> Marketplace
License Agreements	License agreements are agreements between CU Denver and a commercial entity to grant rights to the company for the purpose of developing, making, and/or selling products based upon CU Denver's intellectual property	<b>Department:</b> CU Innovations (Formerly TTO)	<b>Required Documents:</b> (1) Contract (2) Name and contact info of collaborator (3) Contact information of other institution's technology transfer office (4) University of Colorado technology case number (if applicable)  <b>Intake System:</b>
Inter-Institutional IP Agreements	An agreement between academic institutions that dictates which institution will take point on intellectual property protection and commercialization.	<b>Department:</b> CU Innovations (Formerly TTO)	<b>Required information:</b> (1) Contract (2) Name and contact info of collaborator (3) Contact information of other institution's technology transfer office (4) University of Colorado technology case number (if applicable)  <b>Intake System:</b>
Data Use Agreements/ Business Associate Agreements (BAAs)	Includes agreements related to the use of data that CU Denver is obtaining or allowing another entity to have access to.	<b>Department:</b> Office of Regulatory Compliance (ORC)	<b>Required Documents:</b> (1) Contract (2) Data Summary Sheet  <b>Intake System:</b> <a href="https://forms.ucdenver.edu/secure/rss_ra_ogc_ra">https://forms.ucdenver.edu/secure/rss_ra_ogc_ra</a>
Member Practice Consulting Agreements	This includes agreements related to consulting that are subject to a Member Practice Agreement CU Medicine (formerly UPI). Examples include: <ul style="list-style-type: none"> <li>• Consulting services</li> <li>• Clinical services</li> </ul>	<b>Department:</b> CU Medicine (Formerly UPI)	<b>Required Documents:</b> (1) Contract (2) Sponsor contact email  <b>Intake System:</b> (1) Send via email to Rob Shikiar at <a href="mailto:Robert.Shikiar@upicolo.org">Robert.Shikiar@upicolo.org</a> (2) Please use the following format for subject line: Contract with (name of company) for (name of provider) (department)


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Gift Agreements	This includes agreements where CU Denver is receiving money as a gift, with no deliverables or strings attached.	<b>Department:</b> Office of Advancement	Please contact your department administrator on how to move forward.
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# Creating a Routing for non-Grants.gov Proposals

Fall 2016

# Create New Proposal

 Help

**My Projects**

**My Proposals**

- Show/List
- Search For**
- Create New Proposal**
- Create New PT Record
- Ad Hoc Reports
- Standard Reports
- Help - PD
- Help - PT

**My Awards**

### Proposals - Search For

Use \* for wildcard

Property	Value	Property	Value
Proposal number	<input type="text"/>	Project/Account/Misc ID	<input type="text"/>
Sponsor/Scheme	<input type="text" value="Sponsor Name"/>	Proposal Status	<input type="text"/>
PI	<input type="text" value="Investigator Name"/>	Primary Assoc Dept	<input type="text" value="Department Name"/>

#### Additional Search Fields

Title	<input type="text"/>	Project Status	<input type="text"/>
Sponsor Type	<input type="text" value="Sponsor Type"/>	Deadline	<input type="text"/>
Sponsor Opportunity Number	<input type="text"/>	Requested Start Date	<input type="text"/> <input type="text"/>
PI Department	<input type="text" value="Department Name"/>	Requested End Date	<input type="text"/> <input type="text"/>



# Proposal Questionnaire

The screenshot shows the 'New Proposal Questionnaire' interface. At the top, it says 'Step 0: Confirm you intend for the PI of this proposal to be Pham, Dung' with a 'Change' button next to the name. Below that, it says 'Step 1: Create a "New" Proposal' with a 'Create a New Proposal' button. An inset window titled 'Select value - Mozilla Firefox' shows a 'Personnel Listing' table with three rows. The first row is highlighted. The second row has 'SPONPGMS/GIFTS' highlighted in its org. code column. A 'Select' button is also visible in the inset window.

**1.** Creator of proposal will automatically be PI. Update this accordingly.

**2.** Locate PI, select profile with a Sponsored Programs/Gifts org. code, and click **Select**.

**\*\*If there is no Sponsored Programs/Gifts profile listed for the PI, select a different profile and the correct org. code can be added later.**

# Proposal Questionnaire

## New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be **Coulombe Mansfield, Marilyne G Change**

Step 1: Create a "New" Proposal

Create a New Proposal

Continue

Step 1: Continued

Continue

Select from Grants.Gov Opportunities

Select from Grants.Gov Opportunities

Select from all SPIN Opportunities

Setup Proposal Manually

Step 2: Please Select a Proposal Type

Continue

New

New

Resubmission - New

Competing Continuation

Resubmission - Competing Continuation

Renewal

Non-Competing Continuation

Resubmission - Non-Competing Continuation

Supplement

Amendment/Modification/Revision

Administrative Modification/Correction

Select accordingly.

# Proposal Questionnaire

**New Proposal Questionnaire** Back

Step 0: *Confirm you intend for the PI of this proposal to be* Coulombe Mans

Step 1: "New" Create a New P

Step 2: *Proposal Type* New

Step 3: *Select a Sponsor*

Continue

national sci

- Binational Science Foundation
- Educational Assistance - National Science Foundation
- National Science Foundation**
- United States - Israel Binational Science Foundation

Type Sponsor name to locate. If not found, double check spelling and other potential names. Select Default Sponsor if not found.

If Default Sponsor is selected, please e-mail [ERASupport@ucdenver.edu](mailto:ERASupport@ucdenver.edu) with the sponsor name and web address so this is added to our database.

Step 4: *"Tracking" Number or "Proposal" Number* This proposal will be automatically numbered.

Step 5: *Proposal's Title*

Demonstration of building a non-Grants.gov proposal.

Continue

# Proposal Questionnaire

## New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be **Coulombe Mansfield, Marilyne G Change**

Step 1: "New" **Create a New Proposal**


Step 2: Proposal Type **New**


Step 3: Selected Sponsor **National Science Foundation**

Step 4: "Tracking" Number or "Proposal" Number **This proposal will be automatically numbered.**

Step 5: Proposal's Title **Demonstration of building a non-Grants.gov proposal.**

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

From  

To  

Verify all information before creating the proposal. Click the "Back" button to revise any fields.

Continue

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

▼

Verify number of budget periods.

\*NOTE: If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.

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.

Step back through responses

Create Proposal

# Setup Questions

- ▶ After you click “Create Proposal”, the Setup Questions screen appears. From this point forward, changes must be made inside the proposal.
- ▶ You will now have a system assigned proposal number (top left corner), remember to write this down!
- ▶ If you later decide you do not need this proposal, you must send a request to [erasupport@ucdenver.edu](mailto:erasupport@ucdenver.edu) to have the team delete this for you.
- ▶ The InfoEd proposal will automatically populate some fields depending on the information that was previously entered. Ensure the information is correct for all of the questions, even if values are entered by default. When finished, select “Save and Continue”.
- ▶ Quick Tip - mark this tab completed LAST! Any future edits on this page will remove all “completed” check marks on the other proposal tabs.

# Setup Questions

**Deadline Information**

Answer and verify all information on this initial screen, then **SAVE** to continue.

Deadline Type: Sponsor Receipt

Deadline Date: 30-Sep-2016

Deadline Time: 5:00:00 PM

Deadline TimeZone: (UTC-07:00) Mountain Standard Time [Mountain Time (US & Ca)]

**General Proposal Properties**

Will your proposal include any Subawardees?  Yes  No

Will your proposal involve the use of Human Subjects?  Yes  No

Will your proposal involve the use of Laboratory Animals?  Yes  No

Will your proposal be a training grant?  Yes  No

Associated Departments: 21464 -- SOM-SRG-CCTCARE SALES&SERVICES  
[Add](#)

PI Departments: 21462 -- SOM-SRG-CCTCARE SPONPGMS/GIFTS  
[Add](#)

Associated Centers/Programs: None Identified  
[Add](#)

**Budget Setup Information**

Select the Program Type: Organized Research

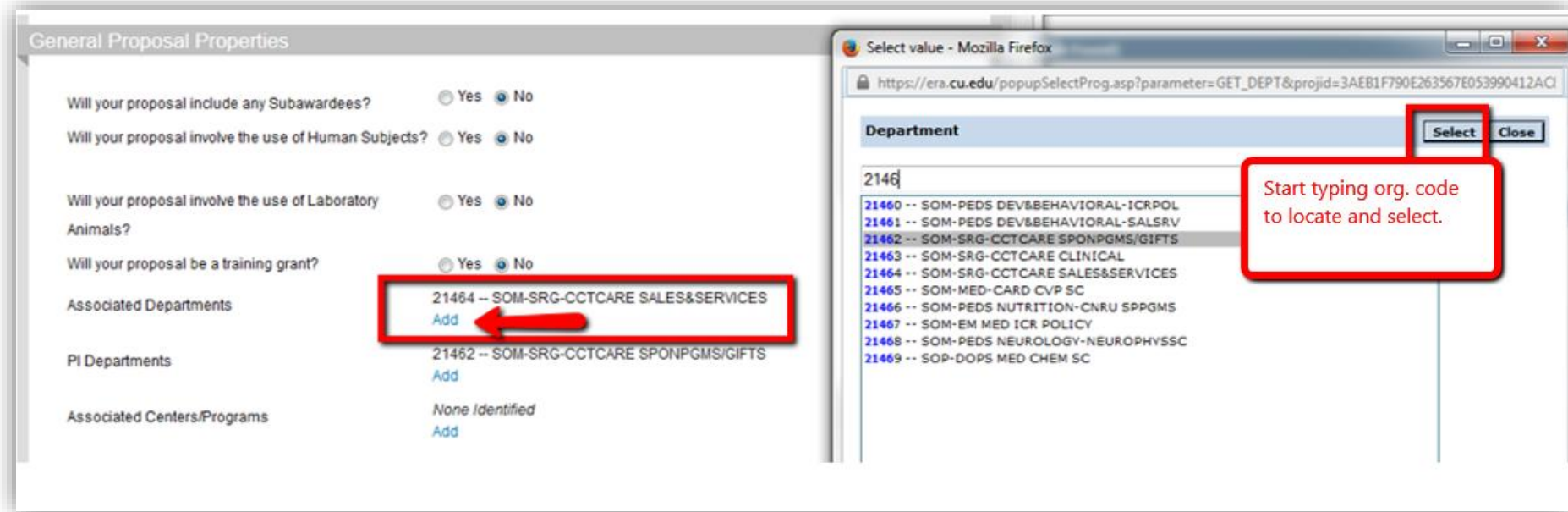
The majority of the research will be conducted:  On Campus  Off Campus

Save

Associate a Sponsored Programs/Gifts org. code here if not selected initially.

On campus = 50% of work or more will be on the University campus.

# Setup Questions - Add Sponsored Programs/Gifts Org. Code



General Proposal Properties

Will your proposal include any Subawardees?  Yes  No

Will your proposal involve the use of Human Subjects?  Yes  No

Will your proposal involve the use of Laboratory Animals?  Yes  No

Will your proposal be a training grant?  Yes  No

Associated Departments

- 21464 -- SOM-SRG-CCTCARE SALES&SERVICES  Add
- 21462 -- SOM-SRG-CCTCARE SPONPGMS/GIFTS  Add
- None Identified

PI Departments

Associated Centers/Programs

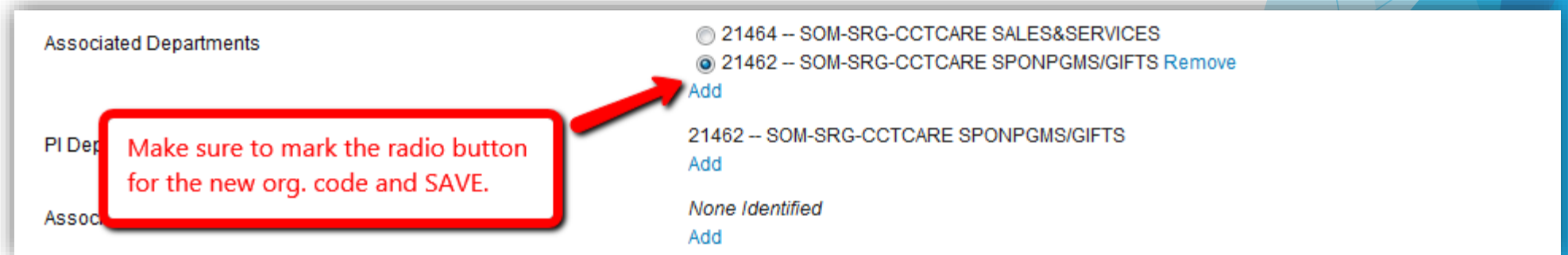
Select value - Mozilla Firefox

Department

2146

- 21460 -- SOM-PEDS DEV&BEHAVIORAL-ICRPOL
- 21461 -- SOM-PEDS DEV&BEHAVIORAL-SALSRV
- 21462 -- SOM-SRG-CCTCARE SPONPGMS/GIFTS
- 21463 -- SOM-SRG-CCTCARE CLINICAL
- 21464 -- SOM-SRG-CCTCARE SALES&SERVICES
- 21465 -- SOM-MED-CARD CVP SC
- 21466 -- SOM-PEDS NUTRITION-CNRU SPPGMS
- 21467 -- SOM-EM MED ICR POLICY
- 21468 -- SOM-PEDS NEUROLOGY-NEUROPHYSSC
- 21469 -- SOP-DOPS MED CHEM SC

Start typing org. code to locate and select.



Associated Departments

- 21464 -- SOM-SRG-CCTCARE SALES&SERVICES
- 21462 -- SOM-SRG-CCTCARE SPONPGMS/GIFTS Remove

Add

21462 -- SOM-SRG-CCTCARE SPONPGMS/GIFTS

Add

None Identified

Add

Make sure to mark the radio button for the new org. code and SAVE.



# Personnel

Proposal 170816

Done Save

Demonstration of building a non-Grants.gov proposal.  
Dr. Marilyne G Coulombe Mansfield - 21464 -- SOM-SRG-CCTCARE SALES&SERVICES (National Science F

Personnel Add all project personnel in this tab. Personnel Wizard Completed Mark complete when finished.

Setup Questions  
Personnel  
Summary Budget  
Proposal Documents  
UCD | AMC Documents  
Finalize  
Show Help

(\* indicates subproject personnel, \*\* indicates subawardee personnel)

Key Personnel

COI	Responsible Person	% Effort	Order	Organization
	Dr. Coulombe Mansfield, Marilyne G (PI) PD/PI			University of Denver/21
?		0.00	1	SOM-SRG-CCTCARE SALES&SERVICES (National Science F
				CLINIC

If Sponsor is PHS FCOI Compliant, all named personnel must have their COI disclosures submitted.

Is this person appointed to your institution, or will they be if they are not hired or identified yet?  
Yes

Does this person **currently** work at your institution? ("No" implies they either do not work here yet, or are otherwise not assigned or identified yet.)  
Yes

Locate the individual by clicking on the first letter of their last name.  
Powell, Mary S 60067 -- ADM

Answer questions accordingly.

Please Select the "Personnel Type" for this person on this proposal.

- Key
- Other Significant Contributor \*\*
- Non-Key
- Consultant - Key \*\*
- Consultant - Non-Key \*\*

\*\* These people will not be added to the budget in the Personnel section.

Continue Start Over

COI disclosures for project personnel are required for these [sponsors](#).



# Personnel

Personnel Wizard

Completed

Mark complete when finished.

Setup Questions  
Personnel  
Summary Budget  
Proposal Documents  
UCD | AMC Documents  
Finalize

Show Help

(\* indicates subproject personnel, \*\* indicates su

Key Personnel

COI	Person	% Effort	Order	Org
	Dr. Coulombe Mansfield, Marilyne G (PI) PDI/P			
?	✓	0.00	1	
	Powell, Mary			
?		0.00		

Profile is missing Role

Contact Information For - **Mary S Powell** Personnel Type: Key Personnel Consultant  External Consultant  Save Close

Salut \_\_\_\_\_ First **Mary** Middle **S** Last **Powell** Suffix \_\_\_\_\_

Title **IT Senior Prof**

Address **1775 Aurora Court** **MS F528, BDC**

City **Aurora** State **Colorado** Zip **80045-2535**

Country **United States**

Phone **303-724-0489** Fax **303-724-0814** Email **mary.powell@ucdenver.edu**

Institution **University of Colorado Denver** Department **60067 -- ADM VCR OGC ADMINISTRATION [Sat](#)**

Sponsor Credential **NSF FastLane ID** **000650257**

Role **Other (Specify)**

Complete all highlighted fields for all personnel and specify Role.

# Summary Budget

Proposal 170816 Proposal

**Demonstration of building a non-Grants.gov proposal.**  
Dr. Marilyn G Coulombe Mansfield - 21464 -- SOM-SRG-CCTCARE SALES&SERVICES (National Science Foundation)

Done **Save**

**Budget Summary** Show Completed

Enter total direct costs per project period in **Other Costs** and sponsor F&A in **Indirect Costs**.

Period	Start Date	End Date	Direct Costs	Indirect	Total Project
1 PT View	01-Apr-2017	31-Mar-2018	200,000.00	20,000.00	220,000.00
2 PT View	01-Apr-2018	31-Mar-2019	200,000.00	20,000.00	220,000.00
	01-Apr-2017	31-Mar-2019	<b>400,000.00</b>	<b>40,000.00</b>	<b>440,000.00</b>

**SPONSOR NATIONAL SCIENCE FOUNDATION**

Budget Category	Period 1	Period 2	Total
Other Costs	200,000.00	200,000.00	400,000.00
Indirect Costs	20,000.00	20,000.00	40,000.00
	<b>220,000.00</b>	<b>220,000.00</b>	<b>440,000.00</b>

**Summary Budget**

Setup Questions

Personnel

Justifications

Budget Periods and Setups

Proposal Documents

UCD | AMC Documents

Finalize

# Summary Budget - Justification tab

Setup Questions

- Personnel
- Summary Budget**
- Justifications**
- Budget Periods and Setups
- Proposal Documents
- UCD | AMC Documents
- Finalize

Justifications
Show
Completed

Upload "Budget Justification" Documentation

No file selected.

Do not upload Budget Justification here.  
Upload documents in UCD/AMC Documents tab.

Simply complete this tab.

Setup Questions

- Personnel
- Summary Budget**
- Justifications
- Budget Periods and Setups
- Proposal Documents
- UCD | AMC Documents
- Finalize

Budget Summary
Show
Completed

Period	Start Date		Indirect	Total Project
1 PT View	01-Apr-2017	31-Mar-2018	20,000.00	220,000.00
2 PT View	01-Apr-2018	31-Mar-2019	20,000.00	220,000.00
	01-Apr-2017	31-Mar-2019	40,000.00	440,000.00

SPONSOR NATIONAL SCIENCE FOUNDATION

Budget Category	Period 1	Period 2	Total
Other Costs	200,000.00	200,000.00	400,000.00
Indirect Costs	20,000.00	20,000.00	40,000.00
	220,000.00	220,000.00	440,000.00

Go back to the Summary Budget page and mark as "Completed."

# Proposal Documents - do not use!

Proposal 170816

**Demonstration of building a non-Grants.gov proposal.**  
Dr. Marilyne G Coulombe Mansfield - 21462 -- SOM-SRG-CCTCARE SPONPGMS/GIFTS (National Science Foundation)

Done Save

Proposal

Setup Questions

Personnel

Summary Budget

**Proposal Documents**

UCD | AMC Documents

Finalize

**Proposal Documents** Completed

Upload Other Attachment

No file selected.

*All uploaded documents will be automatically converted to PDF.*

Please do not upload any documents in this tab.  
Documents are not transmitted through to OGC for review.  
Simply mark as completed.

# UCD/AMC Documents - Routing Form

UCD | AMC Documents Completed

Components for Initial Application

Form/Document Name	Edit	Status	Upload	Remove
Proposal Routing Form (Proposal, Routing)		Incomplete		Mandatory

Updated By: Dung Pham @ 25-Aug-2016 01:00:49 PM

Complete

Save  
Table of Contents  
Quest Hist  
Form Hist  
Print

Click on Edit to open Routing Form.



### Grant or Contract Routing Form

Page 1

PROPOSAL/ROUTING NUMBER

Proposal/Routing Number from InfoEd

PRINCIPAL INVESTIGATOR INFORMATION

Coulombe Mansfield, Marilyne G

Full Name	Coulombe Mansfield, Marilyne G
Address 1	123 Street
Address 2	
Address 3	
City	Aurora
State	CO
Zip	80045-2560
Email	marilyne.coulombe@ucdenver.edu
Phone	303.724.7625
Fax	
Employee/Student ID	120450

PI

\*Sponsored Programs/Gifts Org Code  -- SOM-SRG-CCTCARE SPONPGMS/GIFTS

\*Rank

\*Does this Funding Opportunity Require a Mentor (e.g Fellowship or Training Grant)?  Yes  No

CONTRACT ROUTING

\*Is this a Contract routing?  Yes  No

SPONSORING/FUNDING AGENCY INFORMATION

\*Agency Name

Primary Agency Name (if funding originates from a source other than the agency listed above, e.g. federal flow-through):

Complete all required fields marked with a red asterisk (\*) and mark as completed when finished.



# UCD/AMC Documents - Important Documents

**UCD | AMC Documents** Completed

Components for Initial Application

Add detailed budget spreadsheet, budget justification, signed sponsor forms, sponsor instructions, etc. on this tab.

Mark Completed when finished.

Form/Document Name	Edit	Status	Upload	Remove
Proposal Routing Form (Proposal, Routing)		Completed		Mandatory

Add Institution Forms/Supporting Documents

Click here to upload docs.

**Upload** Upload Close

Upload new document

Name: Detailed Budget Spreadsheet

Location: Browse... Budget - R01 Beginning to End.xls

Category: Proposal, Routing

Folder: Proposal

Browse to upload document and name accordingly.

Grant routings - please change the Folder type to **Proposal**.

**Add Initial Application Components** Add

Form Name	Type	Add
Proposal Detailed Budget Spreadsheet	Conditional Use	<input type="checkbox"/>

# Finalize

Proposal 170816

**Demonstration of building a non-Grants.gov proposal.**

Dr. Marilyne G Coulombe Mansfield - 21462 -- SOM-SRG-CCTCARE SPONPGMS/GIFTS (National Science Foundation)

Done Save

Make sure all tabs are marked "Completed" before going to the Finalize tab.

- ✓ Setup Questions
- ✓ Personnel
- ✓ Summary Budget
- ✓ Proposal Documents
- ✓ UCD | AMC Documents
- Finalize

**Finalize**

BUILD PDF / FORM PAGES

Form Page	Last Built	Built By

Warning: Once these pages are built, uncompleting any of these "Tabs" will require that you re-build these pages.

- ✓ Personnel
- ✓ Summary Budget
- ✓ Proposal Documents
- ✓ UCD | AMC Documents
- Finalize

Show Help

BUILD PDF / FORM PAGES

ASSEMBLE APPLICATION

**SUBMIT FOR INTERNAL REVIEW**

Once your proposal has been completed, it can be electronically routed internally for necessary approvals. This page will display in two modes: Un-submitted and Submitted.

The screen is in Un-submitted mode when your proposal has not yet been routed. You can determine this by visually identifying a "thumbs up" on the screen. If it is there, then the proposal has not yet been submitted.

The screen is in Submitted mode when your proposal has been submitted and you can see the approval path it is on. Your Administrators have configured the approval path that they feel is appropriate for your proposal. If you have any questions regarding this process, please contact them.

Click on the thumbs up icon to send the routing to the PI for review/approval.

Submit Final Review 👍

Components for **Initial Application**

Current Submission

Form/Document Name	Edit	Status	Upload	Remove
Proposal Routing Form (Proposal, Routing)		Completed		Mandatory
Detailed Budget Spreadsheet (Proposal, Routing)		Completed		

[Add Institution Forms/Supporting Documents](#)



# Sending through for Routing

**Certification** Close

Submitter Assurance: By signing below, I certify that the information submitted within the application is true, complete, and accurate to the best of my knowledge.

Accepted  Declined

**Continue**

Proposal **170816 - Dr. Marilyne G Coulombe Mansfield** "Demonstration of building a non-Grants.gov proposal." (In Development)

[Refresh Route](#) **Submit**

Verify all the correct personnel are in the route and click Submit to send the routing.

		Dr. Marilyne G Coulombe Mansfield	
Step 2	<b>Div/Dept Admin Notification</b>	Myra A Keeble	
	<b>Div/Dept Admin Notification</b>	Ms. Jennifer A. Peterson	
Step 8	<b>Chair Review</b>	Stephanie Farmer	
	<b>Chair Review</b>	Ms. Jennifer A. Peterson	
Step 15	<b>SoM Dean's Office</b>	Brenda D. Crawford	
	<b>SoM Dean's Office</b>	Rhonda W Reid	
	<b>SoM Dean's Office</b>	Ms. Gail Silber	
	<b>SoM Dean's Office</b>	Peggy McIntosh	
Step 25	<b>Div/Dept Admin Notification</b>	Myra A Keeble	
	<b>Div/Dept Admin Notification</b>	Ms. Jennifer A. Peterson	
Step 26	<b>OGC Prelim - DW group</b>	PreAward Grants and Contracts	
	<b>OGC Prelim - DW group</b>	David R. White	
	<b>OGC Prelim - DW group</b>	Marcella Pacheco	



# Next and Final Steps for Sponsor Submission

- ▶ Keep an eye on the routing progress - sometimes this can get stuck on a reviewer. Routing status can be found on the Finalize tab.

Step Number	Step Name	Who	Notified	Decision
Step 1	PI Signoff	Gary K Grunwald PhD	19-Jul-2016 12:11:36 PM	Approved - Approved
Comments: none				
Step 2	Div/Dept Admin Notification	Sarah Marie Trimmer	22-Jul-2016 2:32:46 AM	Informed -
Comments: none				
Step 2	Div/Dept Admin Notification	Mr. Richard S Sasscer Jr,	22-Jul-2016 2:32:47 AM	Informed -
Comments: none				
Step 8	Chair Review	Debashis Ghosh PhD	22-Jul-2016 2:32:48 AM	Approved - Approved
Comments: none				
Step 8	Chair Review	John Martin Kittelson PhD	22-Jul-2016 2:32:49 AM	Not Applicable -

- ▶ OGC will review and notify you when the proposal is returned to the department.
- ▶ Incorporate the edits OGC noted and follow sponsor/OGC instructions to get the proposal submitted.
  - ▶ Some proposals can be submitted by the dept./PI while others require submission by an Authorized Representative - read instructions carefully.

# Thank You!

Please send any questions or comments to:

[erasupport@ucdenver.edu](mailto:erasupport@ucdenver.edu)

InfoEd eRA Portal

<https://era.cu.edu/>

Additional Training Materials can be found [here.](#)

Dung Pham, Business Analyst, 4-9568