



System Navigation and Basic Functions

Author: InfoEd Global
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Table of Contents

1	INTRODUCTION	5
2	LOGIN AND NAVIGATION	6
2.1	REQUESTING SYSTEM ACCESS	6
2.2	LOGGING IN	6
2.3	NAVIGATION TABS	6
2.4	RECORD NUMBERING	7
2.5	SEARCHING FOR RECORDS	8
3	DASHBOARD CONFIGURATION	10
4	STATUSES	13
4.1	CHANGE REQUEST	14
4.2	INITIAL APPLICATION STATUSES	15
4.3	PRE-AWARD STATUSES	15
4.4	INITIAL AWARD STATUSES	15
4.5	AWARD CHANGE	16
4.6	AWARD REVISED OR CONTINUATION YEAR STATUSES	16
4.7	AGREEMENT STATUSES	16
4.8	COVERAGE ANALYSIS STATUSES	17
5	TO DO LIST AND MESSAGES	18
5.1	ROUTING AND WORKFLOW	18
5.2	THINGS TO DO (ASSIGNING AND COMPLETING)	18
5.2.1	<i>Reassigning a To Do Item</i>	20
5.2.2	<i>Messages</i>	21
6	REVIEW AND APPROVAL	22
7	CHANGING THE PI	28
7.1	PROPOSAL DEVELOPMENT	28
7.2	AGREEMENTS	29
8	SETUP TAB	30
9	ATTACHING DOCUMENTS	32
9.1	ATTACHING DOCUMENTS FROM PROPOSAL DEVELOPMENT	32
9.2	ATTACHMENTS TAB	33
9.2.1	<i>Tasks</i>	33
9.2.2	<i>Information Forms (eForms)</i>	33

10	TASKS.....	34
10.1	CREATING AND ASSIGNING A TASK	34
10.2	COMPLETING A TASK	36
11	COMMUNICATIONS TAB	38
12	USER PROFILE.....	40
12.1	CERTIFICATIONS AND TRAINING	41
12.2	SPONSOR CREDENTIALS	41
12.3	PRIMARY ADDRESS.....	42
12.4	DELEGATES.....	42

1 Introduction

This document addresses system navigation and functionality that is common throughout all modules. You will need to use this document in tandem with the specific module training documents.

The following is an outline of the higher level topic areas included in this document, please see the Table of Contents for complete list of topic headings:

- Section 2: Login and Navigation
- Section 3: Dashboard Configuration
- Section 4: Statuses
- Section 5: To Do List and Messages
- Section 6: Review and Approval
- Section 7: Change PI
- Section 8: Set Up Tab
- Section 9: Attaching Documents
- Section 10: Tasks
- Section 11: Communications Tab
- Section 12: User Profile

System Support Contact Information:

For Technical Support: Systemsreporting@uth.tmc.edu

For Functional Support: Your SPA grants or contracts specialist

2 Login and Navigation

2.1 Requesting System Access

All users must complete system training before being granted access to the system.

Register for Training in Learn2Succeed.

After training, complete and submit the START Access Form and send to systemsreporting@uth.tmc.edu

2.2 Logging in

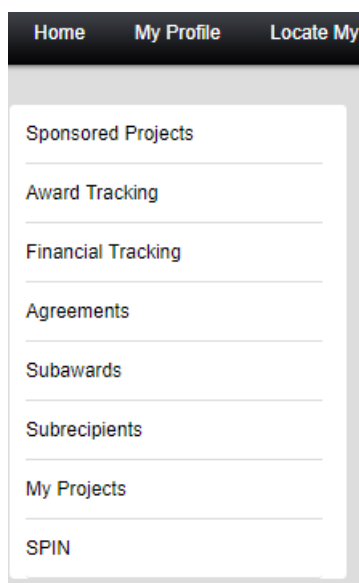
To login, open an internet browser and go to:

go.uth.tmc/start

START is connected to UTHHealth's Single Sign On. Use your UTHHealth credentials to log in.

2.3 Navigation Tabs

Upon logging in, you will land on the START Dashboard page. The left menu bar is used to navigate to various modules of the system. Your user security and role will dictate which modules and records you can access in edit or view mode.



Sponsored Projects Tab contains two START modules; proposal development and Proposal Tracking. Proposal Development is where users complete all grant proposals and Monetary agreements. START has a system to system (S2S) interface to submit federal grant proposals to grants.gov. Proposal tracking is used to receive and manage all grant awards. Users can submit change requests (NCE, Carryover, etc.) via the proposal tracking module.

Award Tracking Tab is used by SPA for Award set up and the financial interface to PeopleSoft.

Financial Tracking Tab is where users will view financial status of sponsored projects. Financial information includes budget vs. expense and remaining balances. Users can drill down to transaction level for all non-payroll expenses. Projects with subawards include subaward invoicing summaries and balances. Clinical trial invoicing and tracking of revenue also occurs in this module.

Agreements Tab: All sponsored project agreements are processed in Agreements Module. Agreements can stand alone or be linked to any other record in the START system. Users can submit non-monetary agreements to SPA via the agreements module. Coverage Analyses for Clinical Trials are also processed in this module.

Subrecipients and Subawards Tabs are used by SPA to initiate and manage the entire subaward monitoring and agreement processes.

My Projects Tab is a quick link to all the project on which the user is listed as PI or Co-I. Department Administrators will be able to access all projects in assigned departments.

SPIN is InfoEd's Opportunity Database of over 14,000 grant sponsors. Users can search for funding opportunities based on pre-defined criteria and receive emails anytime a new opportunity that meets that criteria is added. See the SPIN training guide to set up opportunity searches. Once an opportunity is selected in SPIN you can immediately begin the grant proposal in the START system.

2.4 Record Numbering

UTHealth has established the following numbering of records:

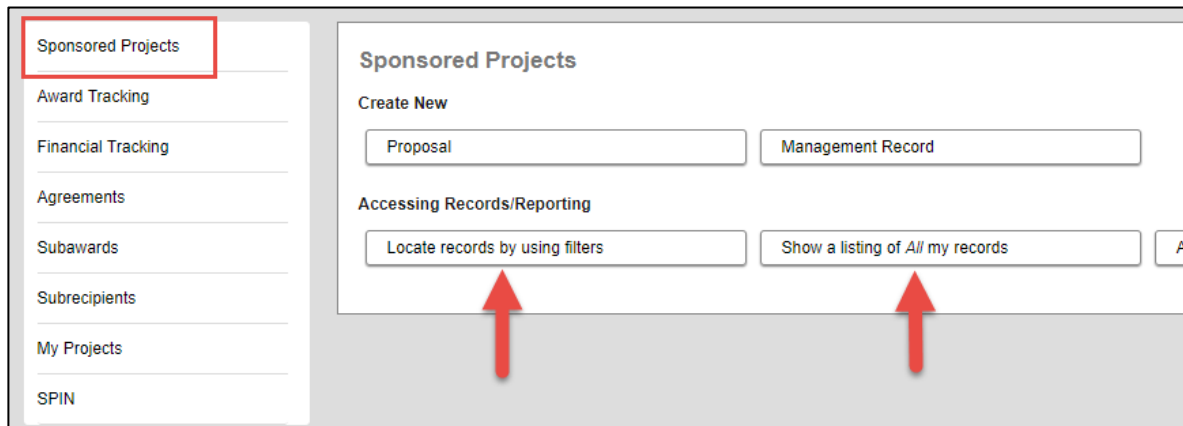
Proposals:	PXXXXXX (auto assigned)
Awards:	AWD-PXXXXXX (duplicating the proposal number after the P)
Agreements:	AGTXXXXXX (auto assigned)
Subrecipient Institutions:	SRXXXX (auto assigned)
Subawards (outgoing)	SAXXXXXXX (auto assigned)
Subprojects:	AWD-PXXXXXX-PROJ1, PROJ2, COREA, COREB etc. (manually assigned)

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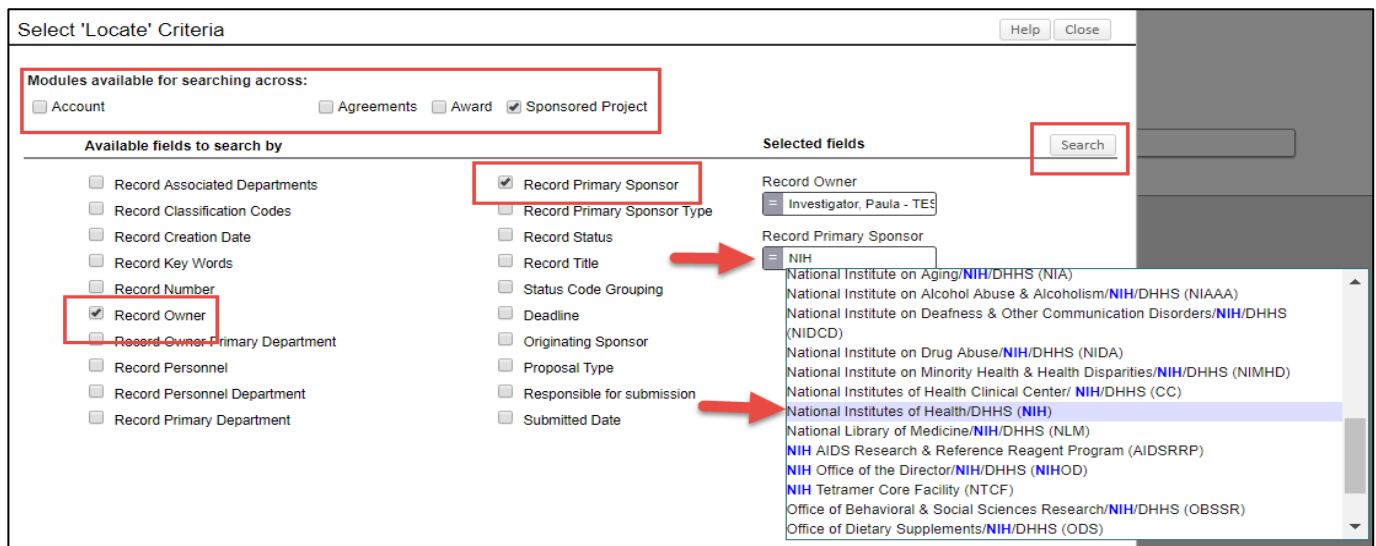
2.5 Searching for Records

From the dashboard navigation tabs, you can search for any record in the system (based on your security). From the sponsored Projects tab, you can navigate to any project (except stand-alone agreements).

Once in the project tab, you can utilize the navigation tabs within the record to access all proposal submissions and associated awards, subawards, and agreements along with all associated documents and processing and financial status. You can also access specific records in specific tabs.



You have the option of searching all records or just searching your (as PI or Co-I) records.



- Select the modules you would like to search.
- Select the criteria by which you want to search.
 - Start typing the criteria specifics.
- Click Search.

Results found: 58

Export to Excel

1 - 20 of 58 items

Drag a column header and drop it here to group by that column

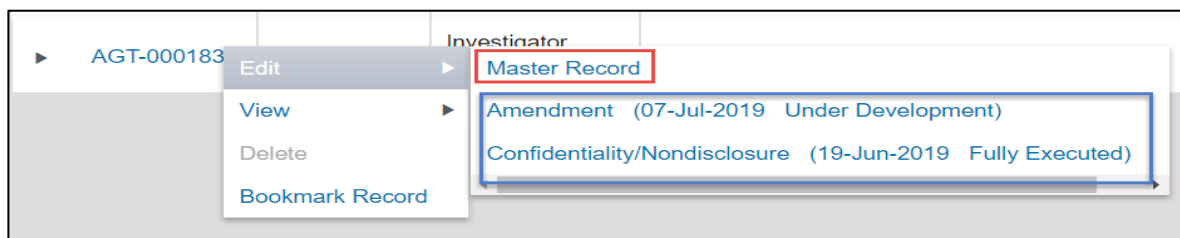
Record Number	Record Owner	Record Primary Sponsor	Record Title	Proposal Type	Record Status	Deadline
P00047101	Investigator, Paula	National Institutes of Health/DHHS (NIH)	UAT2: NIH R21 with Costshare and Humans	New/Original	Budget approved	05-Jul-2019 12:00 AM
P000469	Investigator, Paula	National Institutes of Health/DHHS (NIH)	Testing	New/Original	Under development	
P000466	Investigator, Paula	National Institutes of Health/DHHS (NIH)	UAT 2 NIH: NIH R21 with CS and HS-ts	New/Original	Under development	
P000448	Investigator, Paula	National Institutes of Health/DHHS (NIH)	Test proposal ID C waiver included	New/Original	Budget review	07-Sep-2019 12:00 AM
P000442	Investigator, Paula	National Institutes of Health/DHHS (NIH)	Display e-form IDC and cost share boxes	New/Original	Under development	
P000421	Investigator, Paula	National Institutes of Health/DHHS (NIH)	New Proposal Created for Charles SPASpecialist on 25-Jun-2019 11:19:16 AM	New/Original	Active	
P000395	Investigator, Paula	National Institutes of Health/DHHS (NIH)	UAT 17: NIH R21 Multi PI IDC Split	New/Original	Under development	
P000388	Investigator, Paula	National Institutes of Health/DHHS (NIH)	MP test	New/Original	Under development	19-Jun-2019 12:00 AM

Results will display on your home screen.

When opening a record, you may have the option of choosing from the master, overall record, or a specific submission.

If you open the master record, you can still navigate to any specific submission. And, if you open a specific submission, you can still navigate to other areas of the master record.

The option of opening to a specific submission simply reduces the number of tabs you will have to click if you had opened the master record.



3 Dashboard Configuration

All users will land on the Dashboard upon logging into the system. All user dashboards are configurable and can be set up as preferred by each user. The dashboard consists of “Widgets” or tiles that provide a variety of information, graphs, links, etc.

What you can view on your dashboard is controlled by system security. You will only be able to see your items (as a PI) or your department’s items (as a Chair, Department Administrator, or Study Coordinator) and your school’s items (as a Dean or Associate Dean).



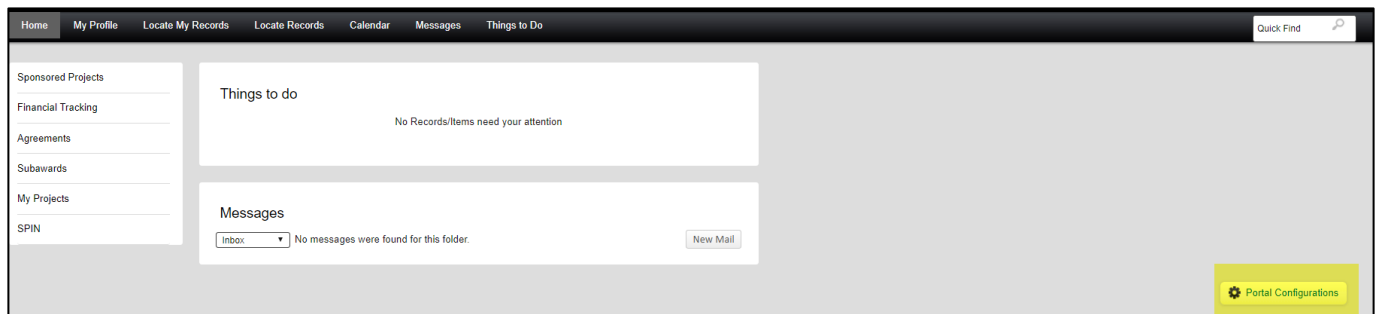
Please Note

There are two mandatory widgets for every user:

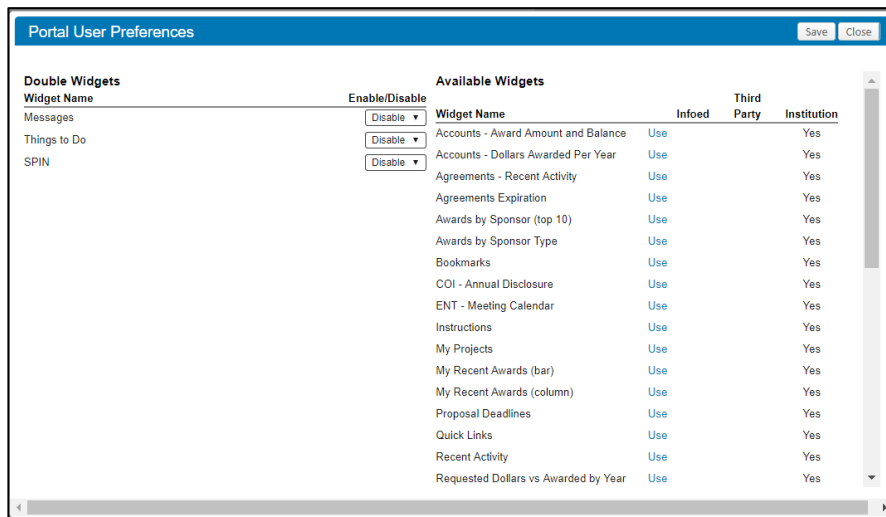
- 1) Things to do, and
- 2) Messages.

These cannot be removed from your dashboard.
Widgets can be added and arranged how you prefer.

To configure your dashboard, click the [Portal Configurations](#) button.



The Portal User Preferences window opens.



To select a widget, simply click on the Use hyperlink for that widget name.

Portal User Preferences

SaveClose

Double Widgets

Widget Name

Disable

Disable

Disable

Messages

Things to Do

SPIN

Available Widgets

Widget Name	Infoed	Third Party	Institution
Accounts - Award Amount and Balance	Use		Yes
Accounts - Dollars Awarded Per Year	Use		Yes
Agreements - Recent Activity	Use		Yes
Agreements Expiration	Use		Yes
Awards by Sponsor (top 10)	Use		Yes
Awards by Sponsor Type	Use		Yes
Bookmarks	Use		Yes
COI - Annual Disclosure	Use		Yes
ENT - Meeting Calendar	Use		Yes
Instructions	Use		Yes
My Projects	Use		Yes
My Recent Awards (bar)	Use		Yes
My Recent Awards (column)	Use		Yes
Proposal Deadlines	Use		Yes
Quick Links	Use		Yes
Recent Activity	Use		Yes
Requested Dollars vs Awarded by Year	Use		Yes

While not mandatory, the following widgets are highly recommended:

- Proposal Deadlines
- Accounts – Award Amount and Balance
- Quick Links
- Workflow Map

Once you select your widgets, you can arrange them on your dashboard by clicking the arrows to move them up or down, or to the left or right column.

Portal User Preferences

SaveClose

SPIN Bookmarks	Use	Yes
Top 10 Award Total by Department (bar)	Use	Yes
Top 10 Award Total by Department (column)	Use	Yes
Top 10 Award Total by Investigator (bar)	Use	Yes
Top 10 Award Total by Investigator (column)	Use	Yes
Top 10 Award Total by Sponsor (bar)	Use	Yes
Top 10 Award Total by Sponsor (column)	Use	Yes
Training & Resources	Use	Yes
Up-and-Coming Reviews	Use	Yes
Workflow Map (single)	Use	Yes

Left Column Widgets

Widget Name

Sequence

Switch Column

Things to Do Widget

Messages Widget

Quick Links

Remove

Right Column Widgets

Widget Name

Sequence

Switch Column

Workflow Map

My Projects

Remove

Remove

Click save to view your dashboard.

The dashboard features a top navigation bar with tabs: Home, My Profile, Locate My Records, Locate Records, Calendar, Messages, and Things to Do. A 'Quick Find' search bar is on the right. The left sidebar contains a menu with links: Sponsored Projects, Financial Tracking, Agreements, Subawards, My Projects, and SPIN. The main content area includes:

- Things to do:** A section stating 'No Records/Items need your attention'.
- Messages:** A section with an 'Inbox' dropdown and a 'New Mail' button, stating 'No messages were found for this folder.'
- Quick Links:** A list of external links including Grants.gov, NIH, NSF, CPRIT, and others.
- Workflow Chart(s):** A section with a dropdown menu and a list of links: JIT and Awards, Proposal Submission, SPA - SCRA, SPA - G&C, and SPA - CRFA. To the right, there is a 'Proposal Tracking' link repeated five times.
- My Projects:** A section with an 'Add' button and a table with columns 'Project Number' and 'Project Title'.

A 'Portal Configurations' button is located at the bottom right of the dashboard.

If you do not like how the dashboard looks, click [Portal Configurations](#) again to re-arrange, add or remove widgets.

All items in blue are hyperlinks for easy navigation.

Below is an example of a Department Chair's dashboard:

The dashboard for a Department Chair includes the same left sidebar as the first dashboard. The main content area features:

- Things to do:** A section stating 'No Records/Items need your attention'.
- Award Amount and \$ Remaining:** A horizontal bar chart showing two bars. The top bar is labeled '00521545' and 'Balance: \$300,000.00'. The bottom bar is labeled '0054654'.
- Proposal Deadlines - 0 Items:** A section with a 'Record Number' dropdown and a 'Deadline' dropdown.
- Awards by Sponsor Type:** A section with a bar chart showing 'Old 3.32%' and 'Other 6.64%'.
- SPIN Bookmark Widget - My Personal Bookmarks:** A table with columns 'Bookmark name', 'Created date', and 'Modified date'.

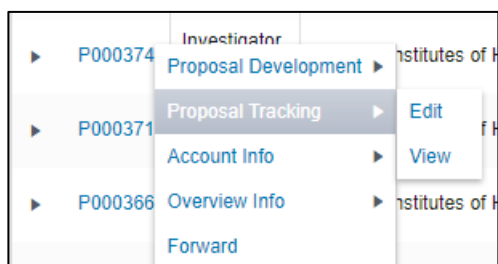
Bookmark name	Created date	Modified date
▶ Stem Cell Opportunities	23-Jan-2019	24-Jan-2019
▶ stem cells	24-Jan-2019	24-Jan-2019
▶ Heart disease	24-Jan-2019	24-Jan-2019
▶ heart disease	24-Jan-2019	24-Jan-2019
▶ Prostate Cancer	29-Jan-2019	29-Jan-2019
▶ Prostate Cancer	29-Jan-2019	29-Jan-2019
- Top 10 Award Total by Investigator:** A bar chart showing the top 10 investigators by award total. The y-axis ranges from 0M to 8M. The x-axis lists investigators: Investigator, Paula; Investigator, Peter; Investigator, Pedro; Chair, Charlie; Turner, Loren; Investigator, Ronald; Investigator, Carol; Admin, Indica; Kessler, Kathleen; and Dougherty, David.
- Messages:** A section with an 'Inbox' dropdown, a 'Page 1 of 2' indicator, and buttons for 'Select', 'Delete', and 'New Mail'.

4 Statuses

Items are processed through the system mostly based on statuses, specifically status changes. There are multiple statuses built into the START system and it will take time to understand where and when statuses are changed.

The project, award increment or agreement status is best viewed in the Status History tab of the Record or of a specific “Submission”. A submission is an award increment (e.g. year 1 or year 2 of an award or an agreement amendment).

[First navigate to the project record and open in Proposal Tracking](#) (Edit or View options are dependent on your access and security).



[Navigate to the Status History Tab.](#) There is a status history at the record level and also within each submission. Where there is only one submission, there is only one status history. In this case, this record has changed statuses 11 times.

Submissions (1)	—	The status history page shows all prior statuses as well as the current status of the project or submission.
PD New/Original	—	
Summary		The project status may be different than the submission (increment) status.
Sponsor		For example, an overall grant award will be “Active” but the year 2 notice of award may be in “Awarded: Processing” status.
Personnel (3)	+	
Budget	+	The Status History tab is also where Departments/PIs will initiate a change request (NCE, Carryforward, etc.)
Agreements (0)		The current status is the top-most status listed.
Communications (8)		
Attachments (5)	+	Any comments made when the status changed are also recorded.
Approvals (0)		
Status History (11)		
Alerts/Reminders (0)		

4.1 Change Request

To request a change to an existing award, change the status to “Active: Change Requested”, add a comment detailing the change being requested and click Add.

You can also attach documents if needed (such as a letter to the sponsor) to accompany the change request.

Status History

Status
Active: Change Requested ▾
Active
Active: Change Requested
Comments:

Effective Date
05-Jul-2019

STATUS	DATE	RECORDED DATE	RECORDED BY	DELETE
Active	19-Jun-2019	19-Jun-2019 12:43:36 PM	SPA Postaward Traffic Cop	
Comments:				
PAF for set-up	19-Jun-2019	19-Jun-2019 12:34:06 PM	Linda SPASpecialist	
Comments:				
Awarded: Processing	19-Jun-2019	19-Jun-2019 12:12:18 PM	SPA Preaward Traffic Cop	
Comments:				
Notice received	19-Jun-2019	19-Jun-2019 12:00:02 PM	John Administrator	
Comments: NOA				
Submitted	19-Jun-2019	19-Jun-2019 11:14:00 AM	Una Admin	
Comments:				
Final review	19-Jun-2019	19-Jun-2019 10:27:25 AM	Pedro Investigator	
Comments:				
SPA approved	19-Jun-2019	19-Jun-2019 10:17:01 AM	Linda SPASpecialist	
Comments:				
SPA review	19-Jun-2019	19-Jun-2019 10:13:33 AM	John Administrator	
Comments:				
Budget approved	19-Jun-2019	19-Jun-2019 09:55:28 AM	Donte DMO	
Comments:				
Budget review	19-Jun-2019	19-Jun-2019 09:43:15 AM	John Administrator	
Comments:				
Under development	19-Jun-2019	19-Jun-2019 08:58:11 AM	John Administrator	
Comments: Proposal Created				

4.2 Initial Application Statuses

The following are the Initial Application Statuses:

- Under Development
- Budget Review
- Budget Approved
- SPA Review
- SPA Approved
- Final Review
- Approved for SPA Submission
- Submitted
- Returned for Corrections
- Not Submitted
- Not Funded
- Withdrawn

4.3 Pre-Award Statuses

The following are the Pre-Award Statuses:

- Notice Received (from sponsor)
- JIT Requested
- JIT in Process
- JIT Submitted
- JIT Not Submitted
- Guarantee Requested
- Guarantee Approved
- Guarantee Not Approved
- Active: On Guarantee

4.4 Initial Award Statuses

The following are the Initial Award Statuses:

- Notice Received (from sponsor, such as Notice of Award Received)
- Awarded: Processing
- PAF for Set Up
- Active

4.5 Award Change

The following are the Award Change Statuses:

- Active: Change Requested (NCE, Carryforward, rebudget, PI Change, etc.)
- Active: Change Processing
- Active: Change Disapproved
- PAF for Setup
- Active
- Relinquished

4.6 Award Revised or Continuation Year Statuses

(These apply to the current award increment only while the overall award record remains Active).

The following are the Award Revised or Continuation Year Statuses:

- Notice Received (from sponsor, such as Notice of Award Received)
- Awarded: Processing
- PAF for Set Up
- Active

4.7 Agreement Statuses

The following are the Agreement Statuses:

- Under Development
- Submitted (by Department to SPA)
- To Be Assigned (To contracts Specialist)
- Initial Review – SPA
- In Negotiation – SPA
- In Negotiation – Sponsor
- In Negotiation – Legal
- In Negotiation OTM
- Signature (routing for signatures)
- Partially Executed
- Fully Executed
- Terminated
- Expired
- On-Hold
- Cancelled

4.8 Coverage Analysis Statuses

The following are the Coverage Analysis Statuses:

- CA Needed
- CA in Development
- CA Department Review
- CA SPA Review
- CA for PI Approval and QQBR
- CA Department Review with SPA Revisions
- CA Approved
- CA Cancelled
- CA On Hold

5 To Do List and Messages

Things to Do are assigned in two ways:

- 1) Through the Routing and Workflow processes built into the system; and
- 2) Creating a task in the Task Tab.

Whenever something (complete a form, approve a proposal, etc.) is assigned to you, it will appear on your Things to do list and will remain there until you complete the assignment. You will receive both a Things to do and a Message. You can navigate to the assignment from either.

When you receive a notice (information only, no action required) it will be a message only.

5.1 Routing and Workflow

See the Task Section on page 34 to assign an item to complete via the task tab.

Routing – Things to do are assigned automatically in the routing processes. The routing process is triggered anytime a submit button is clicked in the system. Routes are built for the three proposal reviews, when an agreement is submitted to SPA, and for initiating and processing Coverage Analyses. You can add reviewers to a route but cannot delete reviewers from a route. SPA has the ability to bypass a reviewer under certain circumstances. Things to do assigned via a Route are completed on the Reviewer Dashboard as detailed below in the *Review and Approval* sections (page 22). Once a route completes, workflow begins.

Workflow – Workflow forwards projects through the system based on status changes. Generally, when a user completes an assignment it will move to the next status and the next assigned person. The next status and assigned person is generally manually assigned but may be automatically assigned as determined by system configurations.

5.2 Things To Do (Assigning and Completing)

You can assign and complete a Things To Do by completing the item assigned to your or by navigating to the project or award increment's Status History tab.

From your Things To Do List:

[Click on the item you wish to view, complete or approve.](#)

If you need to complete (and subsequently assign) an item, a Task/Assignment Box will appear.

Task/Assignment I am done Close

AGT-000230 - Confidentiality/Nondisclosure
 Subject: Dr. Investigator's NDA request, AGT-000230
 Confidentiality/Nondisclosure
 Investigator, Paula - Sponsored Projects Administration (div)
 Status: To Be Assigned
 Submitted By: Kathleen Kreidler

Log in and review record to assign to the appropriate contracts specialist

Finalize Task/Assignment

Supporting Attachments (Optional) Add

No Attached Documents

Comments:

Next Step/Decision: Initial Review-SPA (CRFA)

Assign to: -->Select Person<--

-->Select Person<--
 Clinical, David - Sponsored Projects Administration (div)
 Clinical, Dorothy - Sponsored Projects Administration (div)
 Clinical, Grace - Sponsored Projects Administration (div)
 Clinical, Thomas - Sponsored Projects Administration (div)

The assignment will provide instructions of what needs to be completed.

When you are done with the assignment you will need to assign it to the next step and person if the option is available. Otherwise, it will auto-assign.

Attach any necessary documents (unless already attached to the record.)

- Add a comment explaining what is needed.
- Select the next step from the dropdown
- Assign to the next person.
- Click "I am done" in the upper right corner.



Critical Warning

Do not mark a task as complete until you actually complete it!

If you complete a task within the record itself by changing the status, this also marks the task as complete.

The item will automatically be removed from your to do list. You can view completed items, filter your to do list, and set display options.

Things to do - 31 Items Filter by Area Show Completed Items Display Options/Sorting Page 1 of 4

P000327 (Sponsored Project) - Your action is required
 Grants.gov for 6/7/19 Investigator, Paula
 Action Item Assigned 4 days ago

From the Status History:

Navigate to the project record and to the desired submission within the record.. There is a status history box for the overall record and within each submission (each proposal or award increment associated with the project). If there is only one submission, there will only be one Status History Tab.

Update the Status box to the next status, select the person to whom you want to assign the next step, add a comment or instructions, and click Save. This will automatically complete the item in your To Do List.

CDA Info e-Form		Status History														
Summary	+	Status Initial Review-SPA (CRFA) ▼ Next Person Dorothy Clinical ▼ David Clinical Dorothy Clinical Grace Clinical Thomas Clinical Comments New CDA for processing.														
Submissions (1)	-															
07-Jul-2019_1	-															
Assignments (1)																
Communications (1)																
Attachments (2)	+															
Departments (1)																
Status History																
Attachments (2)	+															
Linkages	+															
Approvals (0)		<table border="1"> <thead> <tr> <th>STATUS</th> <th>DATE ^</th> </tr> </thead> <tbody> <tr> <td>To Be Assigned</td> <td>07-Jul-2019</td> </tr> <tr> <td>Comments:</td> <td></td> </tr> <tr> <td>Submitted</td> <td>07-Jul-2019</td> </tr> <tr> <td>Comments:</td> <td></td> </tr> <tr> <td>Under Development</td> <td>07-Jul-2019</td> </tr> <tr> <td>Comments:</td> <td>Record Created</td> </tr> </tbody> </table>	STATUS	DATE ^	To Be Assigned	07-Jul-2019	Comments:		Submitted	07-Jul-2019	Comments:		Under Development	07-Jul-2019	Comments:	Record Created
STATUS	DATE ^															
To Be Assigned	07-Jul-2019															
Comments:																
Submitted	07-Jul-2019															
Comments:																
Under Development	07-Jul-2019															
Comments:	Record Created															
Sponsors (0)																

If you need to approve something, the Reviewer Dashboard will appear (see Reviewer Dashboard instructions on page 23):

Proposal - Initial Application			
Number: P000430			
Title: VZUAT NIH R01 Basic - TJR			
Sponsor: National Institutes of Health/ODHS (NIH)			
Submitted:			
Form/Document	Document Type	Submitted	
Proposal Development Record	Proposal package	27-Jun-2019 2:10:50 PM	
Data Collection	Proposal package	27-Jun-2019 11:12:51 AM	PDF
Summary	Proposal package	27-Jun-2019 11:12:51 AM	PDF
Add Comments:			
To be shared with everyone:			
<div> <div>B I U</div> <div> <div></div> <div></div> <div></div> </div> <div>A ▼</div> </div>			
<div> <div>Select a decision:</div> <div> <div>Approved</div> <div>Approved with comments</div> <div>Return for Corrections</div> <div>Not Approved</div> </div> </div>			

5.2.1 Reassigning a To Do Item

- Only SPA has the ability to assign a To Do Item within SPA. Department faculty and staff need to request a delegate for their To Do Items (See Delegates, page 42).
- SPA staff can reassign items to other SPA staff members as outlined below and in accordance with UHealth signature Delegation policy (e.g. a SPA signing official can only assign a needed signature to another SPA signing official)
- SPA Directors can re-assign proposal reviews, award processing, and agreement negotiation to one of their team members or to another team.
- SPA staff can re-assign items to other SPA staff members within their teams provided the other team member agrees to the re-assignment.

5.2.2 Messages

You will receive a message each time a task is assigned to you or to notify you of something.

Messages			Page 1 of 23	Select	Delete
Inbox	New Mail				
Agreements Number: AGT-000263 - Dr. Investigator's NDA request; AGT-000263	Administrator, Adam	Sun 30-Jun-2019 13:57 PM			
Coverage Analysis Initiated: AGT-000263	System, UTStart	Sun 30-Jun-2019 13:57 PM			
Coverage Analysis Initiated: AGT-000258	System, UTStart	Sat 29-Jun-2019 16:02 PM			
Proposal Number: P000444	Admin, Una	Fri 28-Jun-2019 16:36 PM			
Proposal Number: P000383	Investigator, Peter	Thu 20-Jun-2019 11:24 AM			
Agreements Number: AGT-000187 - Master Agreement Received	Special, Michael	Thu 20-Jun-2019 11:01 AM			
Proposal Number: P000404	SPASpecialist, Linda	Thu 20-Jun-2019 10:51 AM			
Agreements Number: AGT-000199 - Dr. Investigator's Grant Terms & Conditions request; AGT-000199	Investigator, Peter	Thu 20-Jun-2019 10:47 AM			
Information Letter	System, UTStart	Thu 20-Jun-2019 10:47 AM			
Agreements Number: AGT-000198 - Dr. Investigator's Grant Terms & Conditions request; AGT-000198	Investigator, Peter	Thu 20-Jun-2019 10:33 AM			

The message provides a link to log into the record.

Reply	Reply All	Forward	Save	Next	Close
From: Administrator, Adam Received: 30-Jun-2019					
To: Traffic Cop, SPA Preaward - The University of Texas Health Science Center at Houston					
CC:					
Subject: Agreements Number: AGT-000263 - Dr. Investigator's NDA request; AGT-000263					
Log in and review record to assign to the appropriate contracts specialist.					
Log In					

You can delete messages at any time by clicking the box to the right of the message and clicking the delete button. You can view deleted messages.

Messages			Page 1 of 23	Select	Delete
Inbox	New Mail				
Agreements Number: AGT-000263 - Dr. Investigator's NDA request; AGT-000263	Administrator, Adam	Sun 30-Jun-2019 13:57 PM			
Coverage Analysis Initiated: AGT-000263	System, UTStart	Sun 30-Jun-2019 13:57 PM			
Coverage Analysis Initiated: AGT-000258	System, UTStart	Sat 29-Jun-2019 16:02 PM			
Proposal Number: P000444	Admin, Una	Fri 28-Jun-2019 16:36 PM			
Proposal Number: P000383	Investigator, Peter	Thu 20-Jun-2019 11:24 AM			
Agreements Number: AGT-000187 - Master Agreement Received	Special, Michael	Thu 20-Jun-2019 11:01 AM			
Proposal Number: P000404	SPASpecialist, Linda	Thu 20-Jun-2019 10:51 AM			



Please Note

You can never delete something from your Things To Do.

These will move automatically when completed.

6 Review and Approval

Once a proposal or agreement is submitted into a review route, reviewers will receive a To Do Item. They will also receive messages.

PIs and Department Grants & Contracts Administrators:

- Receive a to do item to approve budgets (if they are not the ones who submitted the budget into review)
- Receive a message when a budget receives full approval or is returned for corrections
- Receive a message when SPA approves a proposal or returns it for corrections (and a message to attach final science documents.)

PIs and Co-Is:

- Receive a task or to do item to approve an agreement by providing his/her “Read and Understood” (PIs only)
- Receive a task to complete and submit a project specific RCOI disclosure form

CO-Is:

- Receive a notice when included on a proposal

DMOs:

- Receive a to do item to approve budgets (with or without cost share and/or an IDC waiver request)

Chairs, Associate Deans of Management, and EVPs

- Receive a to do item to approve budgets with cost share and/or an IDC waiver request)

The To Do Item appears on the user's dashboard. Reviewers will also receive an Outlook email.

Click on the blue hyperlink to open the reviewer dashboard.

Things to do - 1 Items

P000483 (Sponsored Project) - Your action is required

test data collection form UAT2 Investigator, Mark

Dashboard Assigned 2 minutes ago

Filter by Area ▾

Show Completed Items

Display Options/Sorting

There are three tabs on the Reviewer Dashboard:

- 1) Review,
- 2) Route, and
- 3) Help.

The Review tab is where you will review the proposal and approve or disapprove.

The screenshot shows the 'REVIEW' tab selected in a sidebar. The main content area displays proposal details: 'Proposal - Initial Application', Number: P000483, Title: test data collection form UAT2, Sponsor: National Institutes of Health/DHHS (NIH), and Submitted: 03-Jul-2019 2:48:35 PM. A table lists documents: 'Proposal Development Record' (linked), 'Data Collection' (linked), and 'Summary' (linked). Below this is a 'Select a decision:' section with four buttons: 'Approved', 'Approved with comments', 'Return for Corrections', and 'Not Approved'. A 'Comments I can see...' box shows 'No Comments have been recorded'. A 'Comments to be shared with PI(s)' box is at the bottom.

It is recommended that the reviewer **first open the Summary Form** by clicking on the blue hyperlink.

The Summary provides a one page view of the proposal:

- PI,
- Sponsor,
- Budget Summary, and
- Personnel with Effort.

It also provides the Cost Share amount and justification and the IDC waiver amount and justification if these are applicable to the project.



Please Note

It is important for the reviewer to also not the Proposal Due date on the Summary Form to ensure the approval process moves forward well before the due date.

UT Health - Header

Validate

Save

Complete

Proposal Nbr

P000483

Project Type

Basic/Lab Research or Services

Proposal Type

New/Original

Sponsor Deadline

20-Jul-2019

Project title

test data collection form UAT2

* Primary Sponsor

National Institutes of Health/DHHS (NIH)

Original sponsor

Opportunity/Program

G.g. Training and NIH Ext-UAT FOA (R03-Clinical Trial Not Allowed)

BUDGET INFORMATION

Budget Summary

Start Date	End Date	Direct Costs	Subawards	Indirect Costs	F&A Rate	Total Project
01-Aug-2019	31-Jul-2020	\$0.00	\$79,825.00	\$-18,216.00	54%	\$12,876.00
01-Aug-2020	31-Jul-2021	\$0.00	\$79,825.00	\$-32,792.00	56%	\$-1,698.00
01-Aug-2019	31-Jul-2021	\$0.00	\$159,650.00	\$-51,008.00	-	\$11,178.00

No IDC waiver is being sought

No cost sharing is being sought

PERSONNEL

Personnel (PD)

Prime	Name	Role	Net Effort	Organization/Department
<input checked="" type="checkbox"/>	Investigator, Mark	PD/PI	20	The University of Texas Health Science Center at Houston/GSBS, General (dept)
Prime	Name	Role	Net Effort	Organization/Department
<input type="checkbox"/>	Coord, Bella	Co-PD/PI	30	The University of Texas Health Science Center at Houston/Acute And Continuing Care (79060003)

Prime	Name	Role	Net Effort	Organization/Department
-------	------	------	------------	-------------------------

Next, [open the Data Collection Form](#) to view specifics of the proposal such as the draft proposal abstract, compliance requirements, Intellectual Property disclosures, and additional financial information.

GENERAL INFORMATION

* Proposal Type
New/Original

* Expected Award Type
Grant

* Protocol/Research Plan Developed by
Sponsor

* Short title/Project Nickname
 test data collection
 (max 20 chars)

* Who is responsible for proposal submission to sponsor?
SPA to submit

Attach abstract

SPONSOR INFORMATION

* Direct Sponsor/PTE
National Institutes of Health/DHHS (NIH)

List CRO (if applicable)

Link/URL to Guidelines (if not Federal)

* Has the proposal already been submitted to the sponsor? ☐ Yes ☒ No

* Continuous submission? ☐ Yes ☒ No

Yes ☐ No ☒ * Did the Development Office alert you to this RFP?

INSTITUTIONAL COMPLIANCE

Yes ☐ No ☒ * Does project involve human subjects (or material or data from human subjects)?

Yes ☐ No ☒ * Does project involve stem cells?

Yes ☐ No ☒ * Does project involve vertebrate animals?

Yes ☐ No ☒ * Does project involve biological agents, infectious agents, or recombinant or synthetic nucleic acid?

Yes ☐ No ☒ * Does project involve radioactive materials?

Yes ☐ No ☒ * Does project involve toxic or physically dangerous chemicals or carbon or silica based nanochemistry?

INTELLECTUAL PROPERTY

Yes ☐ No ☒ * Is Intellectual Property (discoveries with commercial potential) reasonably expected to result from this project?

Yes ☐ No ☒ * Is there existing Intellectual Property, developed at or held by UTHHealth, being used in this project?

Yes ☐ No ☒ * Are any materials/data being transferred under this project?

FINANCIAL INFORMATION

* Enter Department ID for FMS account set-up (if awarded)
 67680000

Yes ☐ No ☒ * Does project budget request waiver of indirect costs?

Yes ☐ No ☒ * Is there cost sharing included?

Proposal - Initial Application

Number: **P000483**

Title: ~~test data collection~~ form UAT2

Sponsor: National Institutes of Health/DHHS (NIH)

Submitted:

Form/Document	Document Type
Proposal Development Record	
Data Collection	Proposal package
Summary	Proposal package

Last, you can review the proposal in its entirety by clicking on the **proposal number** or the **Proposal Development Record Link**.

Budget review will only include personnel, budget, justification and draft abstract.

SPA Review will include the entire proposal except final science attachments.

Final Review will be the complete proposal.

When you have completed review, add comments if desired (comments can be to everyone, only to the PIs, or only to the Reviewers) and click [Approving](#), [Approve with comments](#) (if you want to approve but send additional information back to the proposal preparers), [Return for Corrections](#) (in which case you need to enter comments detailing the corrections needed) or [Not Approved](#).

Again, add comments as to why you are not approving the proposal or agreement.

Proposal - Initial Application

Number: [P000483](#)
Title: test data collection form UAT2
Sponsor: National Institutes of Health/DHHS (NIH)
Submitted:

Form/Document	Document Type	Submitted
Proposal Development Record		03-Jul-2019 2:48:35 PM
Data Collection	Proposal package	05-Jul-2019 8:14:05 PM PDF
Summary	Proposal package	05-Jul-2019 8:14:05 PM

Add Comments:
To be shared with everyone

Select a decision:
Approved
Approved with comments
Return for Corrections
Not Approved

Comments to be shared with PI(s)

Comments to be shared with Reviewers



Please Note

Your decision will be recorded and you will not be able to return to the record to change your decision.

REVIEW

ROUTE

HELP

Proposal - Initial Application

Number: [P000483](#)

Title: test data collection form UAT2

Sponsor: National Institutes of Health/DHHS (NIH)

Submitted:

Form/Document	Document Type	Submitted
Proposal Development Record		03-Jul-2019 2:48:35 PM
Data Collection	Proposal package	05-Jul-2019 8:14:05 PM PDF
Summary	Proposal package	05-Jul-2019 8:14:05 PM

Add Comments:

Not Available in View Mode

My Decision is:

Approved

Comments I can see...

No Comments have been recorded

Close

The **Route Tab** provides an overview of all the reviewers and current review status. It also includes a chronology of all the comments made. Comments are only visible by those who each reviewer indicated could view their comments.

REVIEW

ROUTE

HELP

Active Routing Progress

P000483 - Mark Investigator"test data collection form UAT2"

Submitted by Kathleen Kreidler on behalf of Mark Investigator

Route Name	Route Type	Step Number/Name	Who	Notified	Decision	Insert	Remove
Budget Review	Pre-Review	Step 1 - PI (was not submitter)	Mark Investigator	05-Jul-2019 8:14:06 PM	Approved - Approved		
Budget Review	Pre-Review	Step 3 - Investigator notification	William Investigator	05-Jul-2019 9:01:08 PM	Informed -		
Budget Review	Pre-Review	Step 13 - Budget Review Notification	Mark Investigator	05-Jul-2019 9:01:08 PM	Informed -		
Budget Review	Pre-Review		Elizabeth DMO	05-Jul-2019 9:01:08 PM	Informed -		

No comments have been recorded yet

Close

Open Full

The Help Tab provides instructions for the review and approval process.

REVIEW

ROUTE

HELP

You have been identified as someone who needs to perform an On-line Review. The "Review Dashboard" allows you to:

- "See Comments" others have made when they reviewed this item
- "Add Comments" to this item
- Indicate "Your Decision" on the Review of this item
- See the "Routing Progress" that this item has/will take

Many of the items being reviewed have deadlines, so please act accordingly. In order to access this information, you will need to be logged in. If you are unsure of your username/password please click [here](#).

1. Review the items listed on the "Review" tab, marking each item "Reviewed" when you have completed your review of it. Note that "Not Applicable" may be an option and if so, you may select that instead of "Reviewed" when appropriate. No item can be left "Un-Reviewed" to continue.
2. Add any comments to the PI, reviewers, administrators or all viewers as appropriate and click the SAVE icon.
3. Select a value in the "Decision" menu. You may be prompted to acknowledge specific representations and certifications. You must "Accept" these in order to proceed if presented. Click the SAVE icon to confirm your decision and complete your review.

If you intend to "Add Comments", you should do so before you set your decision. Once you set your decision and save, you will not be able make any additional changes, i.e. "Adding Comments" or changing "My Decision" after your decision is saved.

If you have any questions regarding your involvement in this process, or what is expected of you please contact:

UTStart System ✉

7000 Fannin
 UCT 1000
 Houston, TX 77030-5400
 Phone: 713-500-3999
 Fax: 713-383-3746

Close

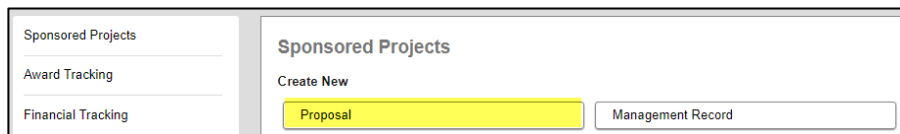
7 Changing the PI

The person logged into the system is assumed to be the PI.

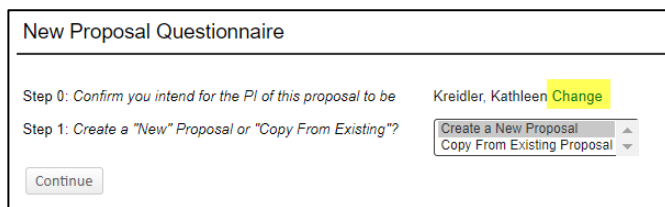
If you are creating a proposal or agreement for someone else, you will need to set the proper PI. This is done by clicking the blue hyperlink “Change” or Pencil Icon next to PI Name field.

7.1 Proposal Development

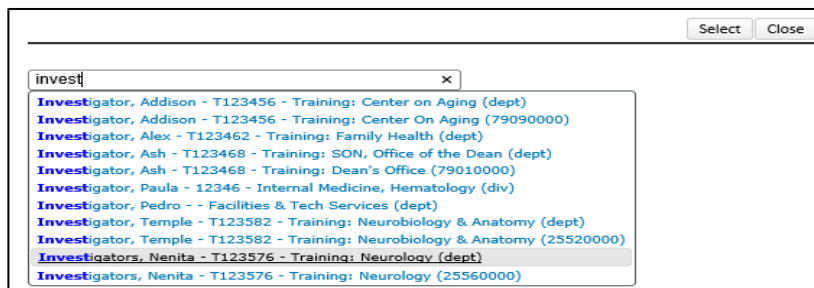
Log in and navigate to Sponsored Projects. Click Proposal to begin the proposal process.



The New Proposal Questionnaire opens. Step 0 asks you to confirm the PI. Click the Change Hyperlink.



Begin typing the PI's last name, when the list displays, highlight the PI and click select.





7.2 Agreements

Log in and navigate to Agreements. Click the appropriate agreement type you want to create.

Sponsored Projects	Agreements			
Award Tracking	Create New			
Financial Tracking	Amendment	Clinical Trial	Collaboration	Confidentiality/Nondisclosure
Agreements	Consulting/Services Out	Coverage Analysis	Data Use/Business Assoc.	Fee for Service/Lab Testing
Subawards	Fee for Service/Lab Testing Out	Grant Terms & Conditions	Master Agreement	Material Transfer
Subrecipients	Professional Services	Salary Reimbursement	Site Out	Sponsored Research
	Subaward In	Copy from existing		

When the Information form displays, click the pencil icon next to the PI Name.

* PI Name Kreidler, Kathleen 
* Sponsor 
* Anticipated Project Start Date? <input type="text"/>

Begin typing the PI's last name, when the list displays, highlight the PI and click select.

Select Close

invest

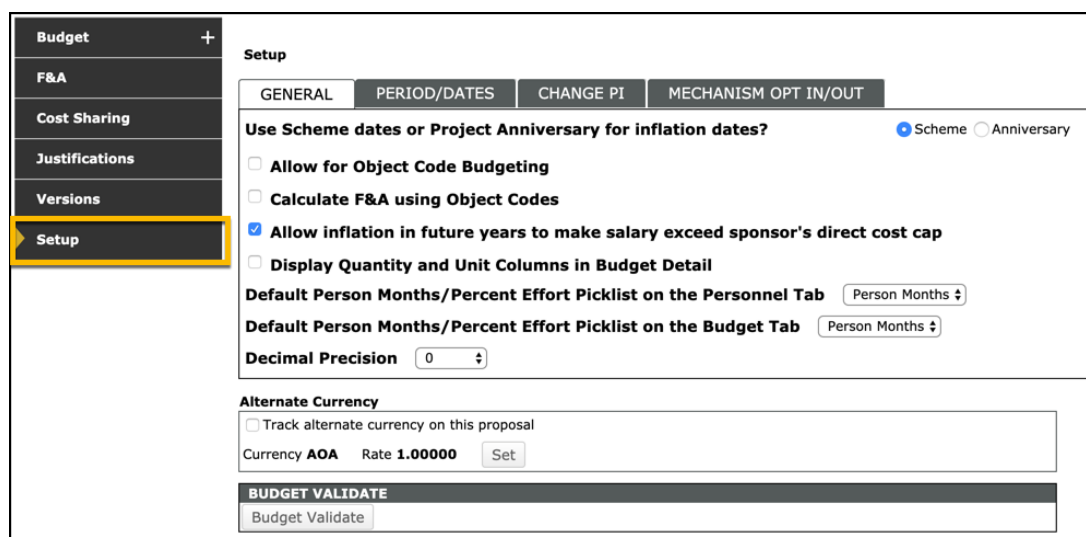
- Investigator, Addison - T123456 - Training: Center on Aging (dept)
- Investigator, Addison - T123456 - Training: Center On Aging (79090000)
- Investigator, Alex - T123462 - Training: Family Health (dept)
- Investigator, Ash - T123468 - Training: SON, Office of the Dean (dept)
- Investigator, Ash - T123468 - Training: Dean's Office (79010000)
- Investigator, Paula - 12346 - Internal Medicine, Hematology (div)
- Investigator, Pedro - - Facilities & Tech Services (dept)
- Investigator, Temple - T123582 - Training: Neurobiology & Anatomy (dept)
- Investigator, Temple - T123582 - Training: Neurobiology & Anatomy (25520000)
- Investigators, Nenita - T123576 - Training: Neurology (dept)**
- Investigators, Nenita - T123576 - Training: Neurology (25560000)

8 Setup Tab

The Setup tab within the Budget allows users with appropriate privileges to make various structural changes to the budget. It is divided into four subtabs, described separately below.

The **General** sub tab allows the user to change default configurations for this specific proposal for things like object code budgeting, whether salary inflation in future years should allow for increases above the current sponsor's salary cap, which option the person months/percent effort picklist defaults to, and to control decimal precision (usually set to zero – whole dollars – in Proposal Development).

It also allows activating *Alternate Currency* tracking, which requires additional configurations to support but then allows users to view the budget summary screen in an alternate currency using a defined exchange rate.



The screenshot shows the 'Budget' tab selected in the left sidebar. The 'Setup' subtab is active, displaying the 'GENERAL' subtab. The 'Setup' subtab has four subtabs: GENERAL, PERIOD/DATES, CHANGE PI, and MECHANISM OPT IN/OUT. The 'GENERAL' subtab contains the following options:

- Use Scheme dates or Project Anniversary for inflation dates?** (Scheme selected, Anniversary unselected)
- ☐ Allow for Object Code Budgeting
- ☐ Calculate F&A using Object Codes
- ☒ Allow inflation in future years to make salary exceed sponsor's direct cost cap
- ☐ Display Quantity and Unit Columns in Budget Detail
- Default Person Months/Percent Effort Picklist on the Personnel Tab** (Person Months dropdown)
- Default Person Months/Percent Effort Picklist on the Budget Tab** (Person Months dropdown)
- Decimal Precision** (0 dropdown)
- Alternate Currency**
 - ☐ Track alternate currency on this proposal
 - Currency AOA Rate 1.00000 Set
- BUDGET VALIDATE**
 - Budget Validate

The **Period/Dates** subtab allows the user to alter the budget periods and project start and end dates. The entire budget can be *shifted* by 6 months or the start date updated to a future date. Budget periods can be added or removed here as well.

The project start and end dates are automatically controlled based on the earliest budget period start date and the latest budget period end date.



Please Note

Generally, budget period dates may not overlap nor can gaps exist between the end of one period and the beginning of the next.

BUDGET PERIOD	START	END
1	01-Jan-2016	31-Dec-2016
2	01-Jan-2017	31-Dec-2017
3	01-Jan-2018	31-Dec-2018
4	01-Jan-2019	31-Dec-2019
5	01-Jan-2020	31-Dec-2020

The **Change PI** sub tab allows the user to change the PI of the proposal. Any other person listed on the record already can be selected or another profile can be chosen as needed.



Please Note

In concert with changing the PI of the record, the current PI can be removed entirely from the record or that person can be left on the record and you can set a new role for that person.

NAME	DEPARTMENT	NEW PI
Jordan, Hal	College of Arts and Sciences	<input checked="" type="checkbox"/>
Aber, Tim S	School of Public Health & Stuff	<input type="checkbox"/>

See *Budget Training Document, Details: Budget Validation* for a description of the **Mechanism Opt In/Out** Subtab.

9 Attaching Documents

There are several ways within the system for attaching documents.



Please Note

All attachments, regardless of how or where they are attached, will be accessible from the Attachments Tab.

The Attachments Tab is in every module except for Proposal Development when the proposal is being submitted via grants.gov.

9.1 Attaching Documents from Proposal Development

Attaching documents from Proposal Development (grants.gov) is done within each tab. This follows the standard process for assembling a federal grant proposal.

Attaching documents from Proposal Development (non grants.gov) is done in Proposal Development, where you can remove and replace attachments until the proposal is submitted into Final Review Route.

9.2 Attachments Tab

Print All Folder Maintenance Add Document Add EForm Delete Selected								
Drag a column header and drop it here to group by that column								
Name	Category	Folder	Managed by	Submission	Versions	Last Updated	Select	
Data Collection	Proposal package	ROOT	Submission Package	Initial Application	1	28-Jun-2019 9:15:25 AM		
Summary	Proposal package	ROOT	Submission Package	Initial Application	1	28-Jun-2019 9:15:25 AM		

9.2.1 Tasks

Task

Record Number
P000432

Record PI
Pedro Investigator

Record Title
V2UAT: NIH R01 with subaward-late

Description
Edit this abstract

High Priority
☒

Reminder

Due
05-Jul-2019

Created Date
30-Jun-2019 04:11:47 PM

Created By
Kreidler, Kathleen

Action Required
Edit the abstract and send your tracked changes back to me.

Completed
☐

Completed Date

Completed By

Assigned To [Add](#)
Addison Investigator

Assigned
30-Jun-2019 4:12 PM

Completed
☐

Completed By

[Delete](#)

Documents [Add](#)
ABSTRACT_DRAFT

Uploaded By
Kreidler, Kathleen

[Delete](#)

9.2.2 Information Forms (eForms)

Upload draft document (if applicable) 



Please Note

Only Sponsored Projects Administration can delete attachments. The only exception is in proposal development prior to final review as noted above.

10 Tasks

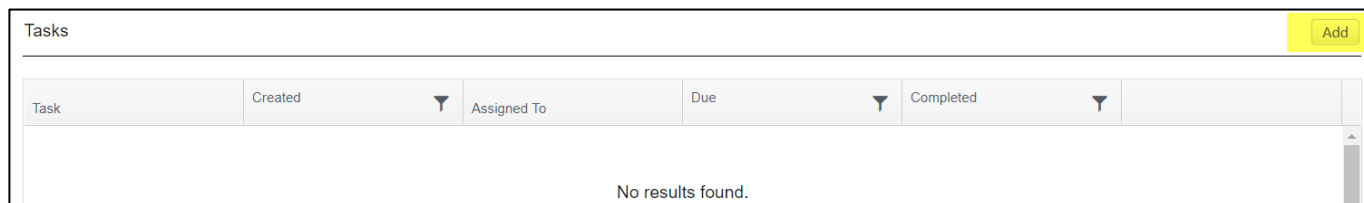
A task can be created and assigned by any user in any module. The task tab can be used to assign something to another user to complete and the system will track tasks.

Some examples of how tasks can be used:

- A PI can assign a document review to a Co-I “Please edit this abstract and return your tracked changes to me”
- A department administrator can assign updating a biosketch to a faculty member. “This is the last biosketch I have for you. Please update and return to me.”
- SPA will send a task to all key persons on a grant award or agreement to submit a RCOI disclosure form.

10.1 Creating and Assigning a Task

Log into the record for which you want to create a task. Click on the Task tab to open the Task window. Click the ADD button.



Task	Created	Assigned To	Due	Completed
No results found.				

Complete the fields highlighted in yellow below.

In addition, you can:

- Check the high priority box (a red exclamation point (!) appears next to the task.
- Set an automatic reminder for a day or two before the due date. The reminder will be sent to the individuals who are assigned to complete the task.
- You can also type additional comments in box outlined in blue (click post). The assignees can do the same.
- Attach a form or document.

Task Save Close

Record Number
P000496

Record PI
Paula Investigator

Record Title
UAT 2: NIH R21 with CS and HS -CM

Description
RCOI Disclosure Form Needed

Due
19-Jul-2019

Created Date
09-Jul-2019 07:08:30 PM

Created By
Kreidler, Kathleen

High Priority

Reminder
15-Jul-2019

Action Required
Complete, sign and return the attached RCOI disclosure Form. When returning, name the attachment RCOI_Your Last Name.

Completed
☐

Completed Date

Completed By

Assigned To [Add](#)

Assigned

Completed

Completed By

Documents [Add](#)
RCOI Form-Blank

Uploaded By
Kreidler, Kathleen

Delete

Comments

Hi Dr. Investigator. As soon as you return this I can complete your award set up. Thanks!
Kathleen Kreidler 09-Jul-2019 7:13 PM

Post

You need to assign the task to at least once person but can assign to multiple people. Click the Add button in the bottom left corner next to Assigned To.

The project personnel and contacts will be on the list to choose from by checking the select box next to the name(s) or, you can access any UTHealth employee by clicking the "Select From Intra-Institutional List" button. Begin typing the person name in the search field and select when the name appears on the list.

Select Contacts [Select From Intra-Institutional List](#) Save Close

Name	Select
Alice Administrator	<input type="checkbox"/>
Paula Investigator	<input checked="" type="checkbox"/>
Sam SPASpecialist	<input type="checkbox"/>
SPA Preaward Traffic Cop	<input type="checkbox"/>

Assigned To Add	Assigned
Paula Investigator	09-Jul-2019 7:26 PM

Click Save and Close.

The Task tab now shows a task outstanding and the task assigned.

Tasks				
Task	Created	Assigned To	Due	Completed
Biosketch Needed	08-Jul-2019 2:11 PM	All Assignments Completed		
RCOI Disclosure Form Needed	09-Jul-2019 7:08 PM	Paula Investigator	19-Jul-2019	

The person assigned the task receives a message and a To Do item.

Things to do - 8 Items Filter by Area ▼ Your Action Itē ▼ [Show Compl](#)

P000496 (Sponsored Project) - RCOI Disclosure Form Needed (Due 19-Jul-2019)
UAT 2: NIH R21 with CS and HS -CM Investigator, Paula
Task Assigned 2 minutes ago

10.2 Completing a Task

Open the assigned task by clicking on the [Things to do](#) hyperlink.

The assigned person can upload an attachment, and add and post comments. When the task is completed. Check the Completed box in the Assigned To Section.

Task

Record Number
P000342

Record PT
Pedro Investigator

Record Title
UAT 3: NIH R01 with subaward-late

Description
Edit Abstract for NIH proposal

High Priority
☒

Reminder

Due
08-Jul-2019

Created Date
30-Jun-2019 04:39:17 PM

Created By
Investigator, Pedro

Action Required
Please edit the draft abstract and return your tracked changes to me.

Completed
☐

Completed Date

Completed By

Assigned To
Carol Investigator

Assigned
30-Jun-2019 4:40 PM

Completed
☐

Completed By

Documents [Add](#)
[Abstract-CIs edits](#)
[Draft Abstract](#)

Uploaded By
Investigator, Carol
Investigator, Pedro

[Delete](#)
[Delete](#)

When completed, the user who created a task receives a notice of completion:

Messages Inbox ▼ New Mail Page 1 of 3 Select ▼ Delete

[Edit Abstract for NIH proposal - Assignment For Carol Investigator Completed](#) Investigator, Carol Sun 30-Jun-2019 17:05 PM ☐

The task Creator must log in and also mark the task as complete by clicking the completed box above the assigned to section.

You can also add a comment (type in the box and click Post) and delete older versions of the attachment.

Task

Close

Record Number

P000342

Record PI

Pedro Investigator

Record Title

UAT 3: NIH R01 with subaward-late

Description

Edit Abstract for NIH proposal

High Priority

☒

Reminder

Due

08-Jul-2019

Created Date

30-Jun-2019 04:39:17 PM

Created By

Investigator, Pedro

Action Required

Please edit the draft abstract and return your tracked changes to me.

Completed

☒

Completed Date

30-Jun-2019

Completed By

Investigator, Pedro

Assigned To

Carol Investigator

Assigned

30-Jun-2019 4:40 PM

Completed

30-Jun-2019 05:05:38 PM

Completed By

Carol Investigator

Documents

Abstract-CIS edits

Draft Abstract

Uploaded By

Investigator, Carol

Investigator, Pedro

I was able to get it down to 30 lines

Carol Investigator

30-Jun-2019 4:59 PM

Thanks Carol, this looks great.

Pedro Investigator

30-Jun-2019 5:12 PM

Comments

Post

11 Communications Tab

The Communications tab captures all messages sent and received regarding the project, including messages generated as statuses change and tasks are assigned.

The START system includes **email fetching** functionality. Any email containing the record number in the subject sent to/from the SPA Preaward email box will automatically be captured and logged in the project record.

SPA staff shall forward any messages to the SPA Preaward email box to be attached to the record. SPA staff can also delete email communications that are unnecessary (duplicate information, Thanks emails, etc.).

Admin Start (1)	Function					
	<input checked="" type="radio"/> Show All <input checked="" type="radio"/> Send Email <input type="radio"/> Record Notes <input type="radio"/> Record Letter <input type="radio"/> Phone Message <input type="radio"/> Add Followup <input type="radio"/> Search/Filter					
Agreements (0)	Communication History (8 records)					
Awards (3)	WHEN	TYPE	TO	FROM	SUBJECT**	ATTACHMENTS RESEND DETAIL DELETE
Approvals (0)	19-Jun-2019 12:34:06 PM	Email	To Traffic Cop, SPA Postaward	From SPASpecialist, Linda	Proposal Number: P000374	
Linkages	19-Jun-2019 12:12:18 PM	Email	To SPASpecialist, Linda	From Traffic Cop, SPA Preaward	Proposal Number: P000374 - Award received	
Deliverables (0)	19-Jun-2019 12:11:32 PM	Email	To SPASpecialist, Linda	From Traffic Cop, SPA Preaward	Proposal Number: P000374 - Award received	
Scheduled Payments (0)	19-Jun-2019 12:02:53 PM	Email	To SPASpecialist, Linda	From Administrator, John	Proposal Number: P000374 - Award received	
Keywords (0)	19-Jun-2019 12:02:13 PM	Email	To SPASpecialist, Linda	From Administrator, John	Proposal Number: P000374	
Classification Codes (0)	19-Jun-2019 12:01:18 PM	Email	To La, Dieman Thuy	From Administrator, John	Proposal Number: P000374	
Communications (8)	19-Jun-2019 12:00:43 PM	Email	To Administrator, John	From Administrator, John	Proposal Number: P000374	
Activity Log (0)	19-Jun-2019 12:00:03 PM	Email	To Traffic Cop, SPA Preaward	From Administrator, John	Proposal Number: P000374	
Attachments (5)						



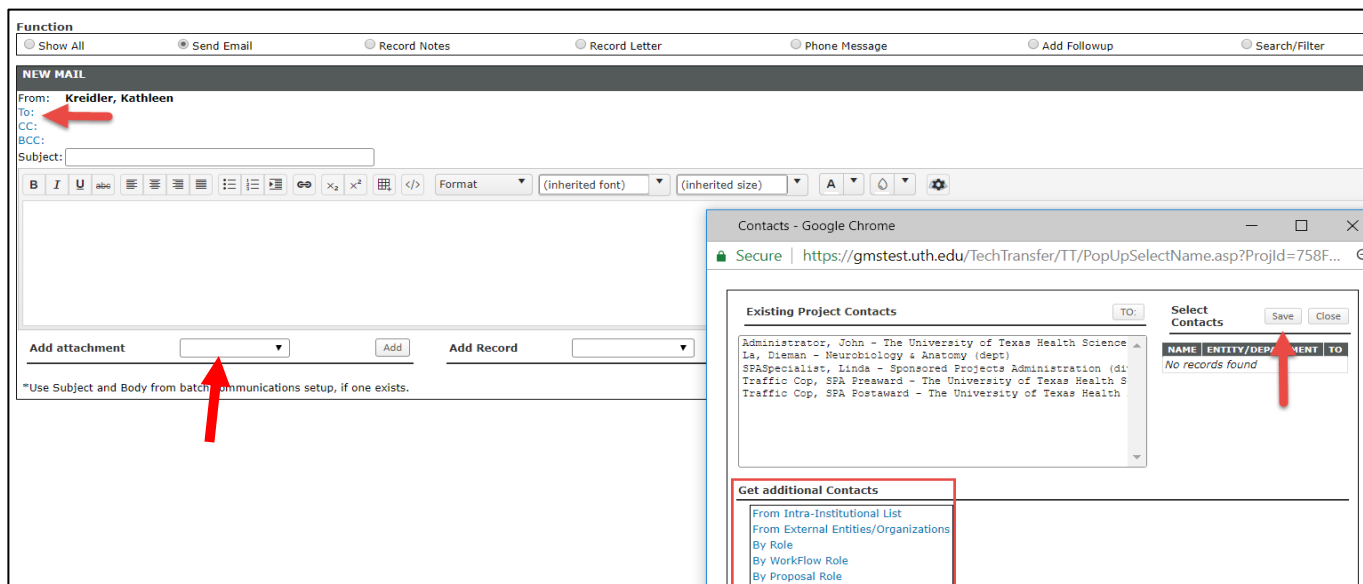
Please Note

Any user can send an email, internally or externally, from within the system.

Click Send Email.

Click "To" to select individuals to whom you are sending the email. You can select from existing contacts, UHealth employees or other external contacts. (Contacts must first be added to the record as a contact.) Click Save.

Complete the email subject – make sure you include the project number, type the message, add any necessary attachments. Click send.



When sending an email, you can also attach a document. When sending from within the record, the attachment dropdown includes a list of all the attachments. Select the ones required to go with the email.

When sending an agreement to the PI for Read and Understood, attach the finalized document.

12 User Profile

The user profile is largely populated through system interfaces to Human Resources and Iris and this information cannot be changed.

There are some sections of the profile that must be populated such as address and Sponsor Credentials so that this information flows through to grant proposals.

The screenshot displays the 'General Information / User Preferences' page. On the left is a sidebar with navigation links: General, Certifications and Trainings, Current Research, Appointments, Sponsor Credentials, Biography, Advisees, Biosketch, Setups, Backups, Delegates, Browse Configuration, and Related Objects. The main content area is titled 'General Information / User Preferences' and includes a profile picture placeholder with an 'Upload' button and a 'Validated Profile' status. The form contains several sections of fields: Personal Information (Salutation, First Name, Middle Initial, Last Name, Suffix), Publishing Information (Publishing First Name, Publishing Last Name), ORCID ID (with a 'Connect your ORCID ID' button), Appointment Date, Degree, Title, Email, Email Format, Phone, Fax, and Web Page. At the bottom, there are fields for Employee ID, Faculty Status, Username, Academic Rank, Citizenship Status, and Citizenship, along with two checkboxes for email notifications.

Users can add their degrees, publishing names, and Orchid ID.

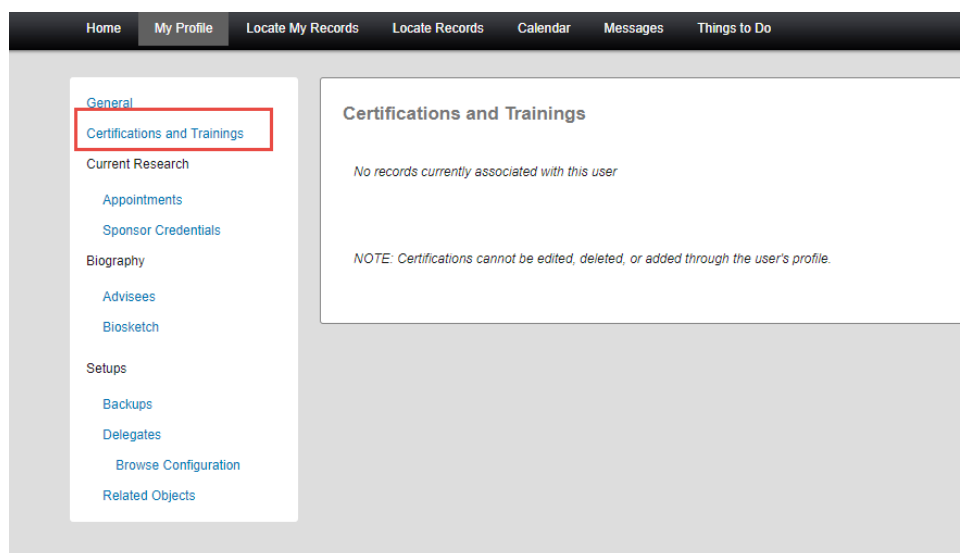


Please Note

UTHealth requires that the email address used is your UTHealth email.

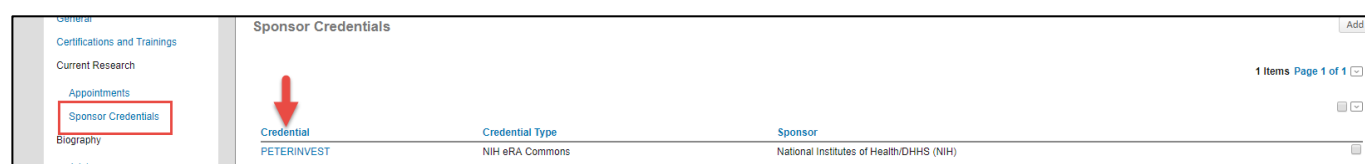
12.1 Certifications and Training

This section is interfaced to iRIS and cannot be changed. It will include the regulatory training classes you have completed.

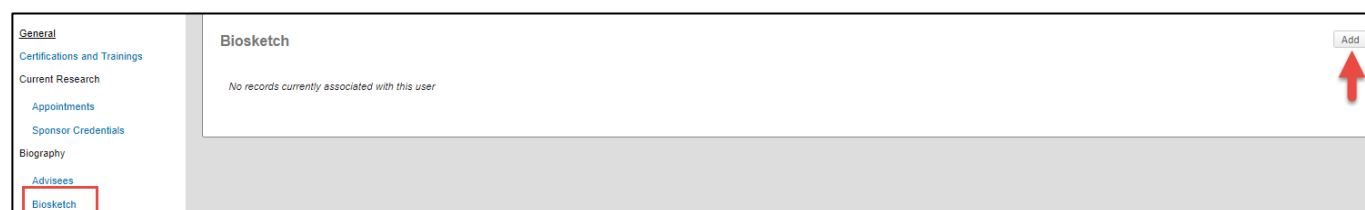


12.2 Sponsor Credentials

Sponsor credentials are user IDs assigned by different sponsors. The most common is the NIH eRA commons ID. SPA will add eRA commons IDs to records as access to the user is granted. The user may add any other IDs as necessary.



Faculty members can store any number of biosketches in the START system. Save them as Word documents so that you can access and edit at any time. When attached to a proposal, the system will convert it to a PDF. Click Add to upload the file.



Choose the file, give it a name, then click Save.

Biosketch

Add

1 Items Page 1 of 1

Biosketch Name	Original	PDF	
NIH Sept 2019	View	View	Delete

12.3 Primary Address

Each user can (but each faculty member must) enter a primary mailing address. This address will populate the grants.gov grant proposals.

Address fields are located toward the bottom of the general tab.

Click Add, enter your address, click Save.

Addresses

Add

1 Items Page 1 of 1

Sort By

Primary Address

<div><div></div><div>6901 Bertner Avenue Houston TX 77030-3901</div></div>	Edit
--	----------------------

12.4 Delegates

Users can delegate tasks/To Do Items to other UTHHealth employees with one exception:

- Required approvals (“signatures”) cannot be delegated except to one level down (Dean’s to Associate Deans, Chairs to Vice Chairs, DMOs to Assistant DMO’s)

All delegate requests forms shall be submitted to systemsreporting@uth.tmc.edu, so have to be entered manually for each period.