System Navigation and Basic Functions
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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 UTHealth’s Single Sign On. Use your UTHealth 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)
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 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.

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.

Click save to view your 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:
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.

The status history page shows all prior statuses as well as the current status of the project or submission.

The project status may be different than the submission (increment) status.

For example, an overall grant award will be “Active” but the year 2 notice of award may be in “Awarded: Processing” status.

The Status History tab is also where Departments/PIs will initiate a change request (NCE, Carryforward, etc.)

The current status is the top-most status listed.

Any comments made when the status changed are also recorded.
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.

```
<table>
<thead>
<tr>
<th>STATUS</th>
<th>DATE</th>
<th>RECORDED DATE</th>
<th>RECORDED BY</th>
<th>DELETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active, Change</td>
<td>05-Jul-2019</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: Add
```

```
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 you 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.
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.

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

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 UTHHealth 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.

The message provides a link to log into the record.

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.

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.
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.

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 note the Proposal Due date on the Summary Form to ensure the approval process moves forward well before the due date.
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.
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.

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

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

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

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

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

9.2.1 Tasks

9.2.2 Information Forms (eForms)

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.

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.
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.

Click Save and Close.

The Task tab now shows a task outstanding and the task assigned.
The person assigned the task receives a message and a To Do item.

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.

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

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

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Record PI</th>
<th>Record Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Pedro Investigator</td>
<td>WAT 2: Non-RS U with outaward lane</td>
</tr>
</tbody>
</table>

**Description**
- Draft Abstract for RFA proposal

**Due:**
- 05/14/2019

**Created Date:**
- 06/16/2019 04:36:17 PM

**Created By:**
- Pedro Investigator

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

<table>
<thead>
<tr>
<th>Completed By</th>
<th>Completed Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investigator</td>
<td>06/16/2019 10:03:26 AM</td>
</tr>
</tbody>
</table>

**Documents**
- Draft Abstract
  - Uploaded By:
    - Investigator, Pedro

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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.).

Click Send Email.

Click “To” to select individuals to whom you are sending the email. You can select from existing contacts, UTHealth 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.

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

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 use 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.

### 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.

### 12.4 Delegates

Users can delegate tasks/To Do Items to other UTHealth 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.