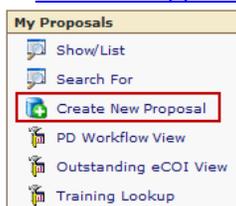


## Submitting Innovation Proposals via InfoEd PD

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

### Creating a New Proposal

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



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

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

New Proposal Questionnaire	
<b>Which group will your proposal be submitted to and reviewed by?</b>	
Partners Innovation	<input type="button" value="Continue to Next Step"/>
Research Management Pre-Award Team	
Partners Clinical Research Office (PCRO)	
Partners Innovation	
<b>How do I determine which office handles this proposal?</b>	
- Please select Research Management Pre-Award Team if your proposal is to a <b>federal or non-profit research sponsor</b> . Click <a href="#">here</a> for additional information.	
- Please select Partners Clinical Research Office (PCRO) if your contract is an <b>industry sponsored clinical trial or clinical research support agreement</b> .* Click <a href="#">here</a> for additional information.	
* <b>NOTE: PCRO amendments and confidential disclosure (CDA) or non-disclosure (NDA) agreements in anticipation of industry sponsored clinical research are not currently routed through PD. If you need to send an amendment, CDA, or NDA, please email your PCRO Agreement Associate.</b>	
- Please select <b>Partners Innovation</b> if your matter includes any of the following: i. Industry sponsored research that is NOT a clinical trial (including research that utilizes previously collected human specimens, clinical data and/or images).** ii. Requests for the transfer of research materials or devices for pre-clinical research to or from industry or academic institutions. iii. Confidential disclosure of pre-clinical research information and/or inventions to or from industry. iv. Transfer of de-identified clinical data/images to or from industry.	
Click <a href="#">here</a> for additional information.	
** <b>NOTE re SBIR/STTR agreements: Do NOT select Partners Innovation if you have a Small Business Innovation Research agreement (SBIR) or Small Business technology Transfer grant (STTR). These agreements should go through Research Management Pre-Award, NOT Partners Innovation. Once Research Management sets up the record in InfoEd, they will forward to Partners Innovation to process the agreement.</b>	

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

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

**New Proposal Questionnaire** [Back]

Proposal Type: Partners Innovation

**Innovation Type:**

SRA or Research Gift [v] **Continue to Next Step**

SRA or Research Gift  
 MTA (Outgoing)  
 MTA (Incoming)  
 CDA

**Innovation Proposal Type:**

i. Are you performing research that will be supported by a company with funding and/or equipment? = **SRA\* or Research Gift\*\***  
 \*Sponsored Research Agreement (SRA) is when industry provides funding or a temporary loan of equipment to support a specific to a research project at the hospital.  
 \*\*Research Gift (GR) is when a company donates unrestricted funding to support a specific research project conducted at the hospital

ii. Have you received a request to send (i) research material (including mice, compounds, antibodies, etc.) or (ii) samples (including tissue, blood, DNA, etc.) to a company or a non-profit institution? (No funding is involved.) = **Material Transfer Agreement or MTA (Outgoing)**

iii. Is this agreement solely for transfer of research material/samples/patient data from a company or non-profit institution to your lab? (No funding is involved), or the transfer of deidentified clinical data from a for-profit organization = **Material Transfer Agreement or MTA (Incoming)**

iv. Is this agreement solely for discussions with collaborators or other employees of a for-profit company and will involve the sharing of proprietary, confidential information? = **Confidential Disclosure Agreement (CDA), also known as Non Disclosure Agreements (NDA)**

**NOTE:** Clinical Data that is being transferred from a non-profit institution without concurrent transfer of the associated human tissue/clinical samples is handled by Research Management as a Data Use Agreement (DUA). Data Use Agreements for the transfer of clinical data (with no concurrent transfer of the associated human tissue) that contains either a limited data set (e.g. date of collection, date of treatment) or full Personal Health Information (e.g. patient name, address, etc.) are handled by PCRO.

If there is to be transfer of both clinical data and the associated human tissue/clinical samples, then both the data transfer and material transfer should be submitted through Innovation as an MTA-in if the data and samples are being received from a company or non-profit, or an MTA-out if the samples and data are being sent out to a company or non-profit.

- Confirm the PI. The PI by default will be the person creating the proposal. To change the PI:
  - Click **Change PI**
  - In the “Search for a particular entry” field type in the name of the PI, last name first.
  - Choose the PI from the dropdown being sure to confirm the NT login for the PI.
  - Click Select.

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

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

**Do you want to...**

**Create a New Proposal**  
 Copy From Existing Proposal

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

**Step 3 Select Immediate Sponsor** [Sponsor Request Form](#)

[P](#) [r](#) [e](#) [f](#) [e](#) [r](#) [r](#) [e](#) [d](#) [\\_](#) [0](#) [-](#) [9](#) [\\_](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) **M** [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Merck & Company, Inc. [v] **Continue to Next Step**

Search for a particular entry

merck

- ❖ Note that there may be many variations of one sponsor name in the system based on funding.
- ❖ If your sponsor cannot be found please click the Sponsor Request Form to complete the necessary sponsor information and have the sponsor added to InfoEd, Insight and PeopleSoft.

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

Step 5

Enter the Proposal's Title

Continue to Next Step

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

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

## Additional Setup Questions Page

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

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

### Submission Mechanism/Form Information

Proposal Immediate Sponsor is set to **Merck & Company, Inc.**. Click [here](#) to change.

[Sponsor Request Form](#)

Is this Proposal a Subcontract? (i.e., another institution will issue a subaward to Partners)  Yes  No

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

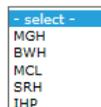


- h. Select the remove icon to remove the original department.

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

7. Select your institution

Please select your Institution



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

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

**Additional Setup Questions** Edit Mode

PI Questionnaire Completed   
Upload Documents  
Submission

**Setup Questions** Show Reset Defaults

Each proposal is broken down into several sections based upon what the sponsor and your institution requires. Once each section is completed, indicate so by checking the **Completed** checkbox in the upper right corner of that section. When all sections have been completed, you will be able to produce the final copy of your proposal.

Which group will your proposal be submitted to and reviewed by? Partners Innovation  
Partners Innovation Proposal Type CDA

**Submission Mechanism/Form Information**

Proposal Immediate Sponsor is set to **Merck & Company, Inc.** [Sponsor Request Form](#)  
Is this Proposal a Subcontract? (i.e., another institution will issue a subaward to Partners) **No**

**General Proposal Properties**

Project Title

PI is set to **McGrogan, Kathleen**.

Associated Departments	Prime
Cardiology SOCA - BWH	Yes
Partners Healthcare	No

Please select your Institution **BWH**

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

## PI Questionnaire

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

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

The screenshot shows a web-based form titled "PI Questionnaire" with a "Completed" checkbox in the top right. The form is for an "INVESTIGATOR QUESTIONNAIRE FOR CONFIDENTIAL DISCLOSURE AGREEMENT". It includes instructions to fill out the questionnaire in connection with a request for a confidentiality and non-use agreement ("CDA"). The form contains several questions, with required ones marked with a red asterisk (\*). Question 1 asks for contact information for the institution or company, including contact person, title, phone number, fax number, address, building/room number, department/division, and e-mail address. Question 2 asks for the name, affiliation, and contact information of other participants, with an "Add" link. Below this is a table with columns for Name, Affiliation, Contact Information (email, phone, etc.), Edit, and Delete. Question 3 asks who initiated the discussion, with a dropdown menu and an "If Other" field. Question 4 asks who initiated the CDA, with a dropdown menu. The form also has a "Submission" button in the top left corner.

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

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

## Coversheet (SRA Only)

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

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

The screenshot shows a web-based form titled "Coversheet" with a "Completed" checkbox in the top right corner. The form is divided into several sections:

- Investigator/Department:** Includes a dropdown for "Institution" and a text area for "Dept Contact" with a "20,000 character max." limit.
- Dept Contact Phone No./Email:** A text area with a "20,000 character max." limit.
- Post Award Department Administrator:** A text input field with "Save" and "Clear" buttons.
- Proposed Performance Location (Institution, Building, Floor):** A text input field.
- Compliance:** A section with four dropdown menus: "Radiation/Isotope Use", "Human Subjects", "Recombinant DNA", and "Animals".

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

## Upload Documents

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

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

Additional Setup Questions Edit Mode

PI Questionnaire Completed

» Upload Documents

Submission

Components for **Initial Application**

All documents required for this proposal must be uploaded here.

**There are no required documents for CDAs but may include the following:**

- \*Draft contract - if the sponsor has provided a contract (Word version preferred)
- \*Email - important/informative correspondence with sponsor

**\*If the project request includes a waiver to standard institutional overhead rates, please include a copy of the waiver request form or email from the Institutional official**

Form Name	Document Type	Open	Status	Completed Form	Last Updated	Updated By	Remove
<a href="#">Add Institution Forms</a>							
<a href="#">Add Supporting Documents</a>							

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

**Upload File**

New document  New version of existing document

Name

Category

Folder

Location   File size limit is 150 MB.

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

Additional Setup Questions Edit Mode

PI Questionnaire Completed

» Upload Documents

Submission

Components for **Initial Application**

All documents required for this proposal must be uploaded here.

**There are no required documents for CDAs but may include the following:**

- \*Draft contract - if the sponsor has provided a contract (Word version preferred)
- \*Email - important/informative correspondence with sponsor

**\*If the project request includes a waiver to standard institutional overhead rates, please include a copy of the waiver request form or email from the Institutional official**

Form Name	Document Type	Open	Status	Completed Form	Last Updated	Updated By	Remove
Document 1	Proposal	N/A		<input checked="" type="checkbox"/>	24-Apr-2015 9:07:14 AM	Kathleen McGroggan(KM546)	
<a href="#">Add Institution Forms</a>							
<a href="#">Add Supporting Documents</a>							

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

## Protocols/Approvals (MTAs Only)

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

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

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

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

Selected	Protocol #	PI Name	Title	Sponsor Name	Status	Approval Date	Expiration Date
<input type="checkbox"/>	2005P002018	Laden, Francine	Heart Disease, Inflammatory, Markers and Particulates	BWH Biomedical Research Institute (BRI)	Active	02/03/2015	02/14/2016
<input type="checkbox"/>	2006P002007	Lewis, Eldrin	Heart Failure Predictors in Stable Survivors of Myocardial Infarction and Coronary: A PEACE Study	INTERNAL	Not Human Research	10/19/2006	
<input type="checkbox"/>	2007P001386	Wood, Malissa	Heart Awareness and Primary Prevention in Your Neighborhood (HAPPY) Heart Trial	Sundry	Active	07/14/2014	08/13/2015
<input type="checkbox"/>	2007P002058	Chae, Claudia	Heart Failure Evaluation in Post-Menopausal Women: The Women's Health Initiative	NH-NA National Institute on Aging	Not Human Research	10/17/2007	
<input type="checkbox"/>	2008P001614	Ay, Hakan	Heart Brain Interactions in Stroke	NH-NINDS National Institute of Neurological Disorders and Stroke	Active	03/23/2015	04/10/2016
<input type="checkbox"/>	2008P002322	Semigran, Marc	Heart Failure Network Genomic/Pharmacogenomic and Biorepository Substudy Protocol	NH-NHLBI National Heart, Lung, and Blood Institute	Active	10/07/2014	10/07/2015
<input type="checkbox"/>	2009P001946	Ay, Hakan	Heart Brain Interactions in Stroke	NH-NINDS National Institute of Neurological Disorders and Stroke	Active	06/25/2014	07/08/2015
<input type="checkbox"/>	2014P001021	Burke, Thomas	Heart failure in western kenya: assessment of quality of life in adults with untreated heart failure and accurate echocardiographic-based diagnosis by non-physician providers	None	Pending		
<input type="checkbox"/>	2014P002785	Seely, Elen	Heart Health 4 Moms: Disease Prevention in Women with a Recent History of Pregnancy Complications	Patient Centered Outcomes Research Institute	Active	03/11/2015	03/11/2016

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

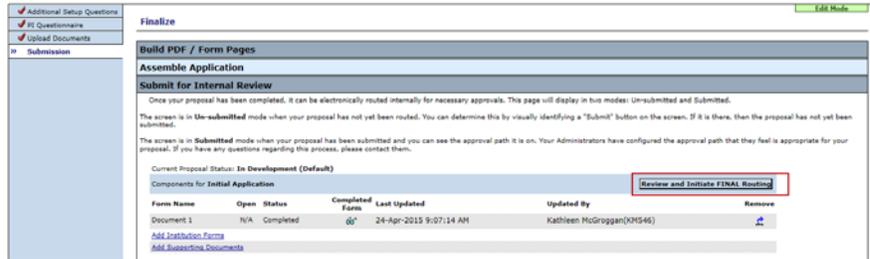
This forms an automatic link between the proposal and the protocol in Insight. You can click on the protocol number to be taken to the information regarding it in Insight.

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

## Submission

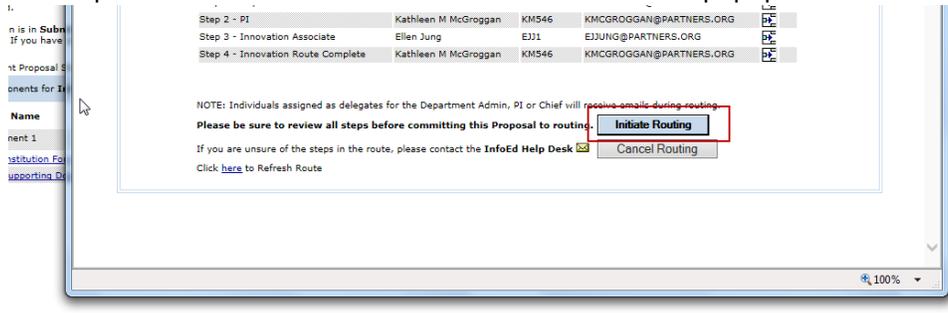
Once you have completed all of the necessary tabs and attached your documentation the proposal will need to be reviewed and approved by the necessary parties.

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



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

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



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