



Marine
Biological
Laboratory



InfoEd Internal Pre-Review User Guide

This document will provide detailed instructions for the internal proposal review process that takes place prior to proposal submission. The guide offers step-by-step instructions based on individual roles and responsibilities. Use the table of contents below to navigate to your applicable section. If you have additional questions, please contact OSP at awards@mbi.edu.

The InfoEd system utilizes Single Sign On capability, meaning you can log into the system using your MBL credentials and password.



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Principal Investigator

If you are a PI and did not initiate the proposal routing within InfoEd, you will be required to perform certain actions during the internal review process. Click the Reviewer Dashboard link in the message received from InfoEd to access and review items.

From here, you will have an option to review a set of documents and a link to the proposal record in the InfoEd system.

The screenshot shows a web interface for reviewing a proposal. On the left is a vertical navigation menu with buttons for 'REVIEW', 'HELP', and 'ROUTE'. The main content area is titled 'Proposal - Initial Application' and includes the following details:

- Number: [P003101](#)
- Title: Test for routing guide
- Sponsor: National Institute of Mental Health/NIH/DHHS
- Submitted:

Form/Document	Document Type	Submitted	
Proposal Development Record		18-Jul-2019 12:34:05 PM	
Budget Justification.docx	Proposal Supporting Documents	18-Jul-2019 12:52:47 PM	Replace
Budget.xls	Proposal Supporting Documents	18-Jul-2019 12:50:32 PM	Replace
Scope of Work.docx	Proposal Supporting Documents	18-Jul-2019 12:52:56 PM	Replace

Below the table is an 'Add Comments:' section with a text area and a toolbar containing icons for bold, italic, underline, list, link, and text color. To the right of the text area is a 'Select a decision:' section with four buttons: 'Approved', 'Conditionally approved', 'Rework needed', and 'Will not approve'.

Please Review items within the Form/Document list:

- Budget attachment
- Budget Justification
- Scope of Work attachment

As PI, you will need to certify the Proposal Summary Form and complete the applicable compliance and space requirements. To do this, access the Proposal Development Record by clicking the "Proposal Development Record".

This screenshot is similar to the one above but highlights the 'Proposal Development Record' link in the document list with a red rectangular box. The rest of the interface, including the proposal details and the 'Add Comments' section, is visible but not highlighted.

A pop-up window will open, displaying the full proposal in InfoEd. The Proposal Summary Form (PSF) is located within the Proposal Development Record on the left-hand side of the screen.



Done Save

- ✓ Setup Questions
- Budget
- Personnel
- ▶ Proposal Summary Form
- Uploads and Approvals
- Finalize

PSF

Proposal Summary Form

Please complete and email this form to the Office of Sponsored Programs (OSP):

10 business days PRIOR to submission deadline with a link to the Program An Project Description and the Budget & Budget Justification

Full/completed proposal is due to OSP 5 business days PRIOR to the submi

PLEASE NOTE: Proposals sent in a timely manner to OSP will help assure a succes deadline may jeopardize the on-time submission of the proposal. Late submissions review which puts both the PI and MBL at risk. PLAN AHEAD AND SUBMIT EARLY!

* Application Type

Research

Announcement

Number

(FOA #, PA # or RFA#)

Proposal Due Date

Key Personnel Data

Personnel

PI	Name	Department
✓	Investigator, Pete	Other Research

Review the Regulatory Issues, Additional Requirements, and Certifications and Approvals section at the bottom of the PSF form. Click applicable checkboxes, then certify the form by clicking the last check box. Complete the form by clicking Complete in the top right corner of the form. To exit the proposal, click the Done button in the top left-hand corner of the screen.

Regulatory Issues

Please Mark All that apply. If already approved, give date & forward copy of approval

Requires IBC Approval:

- Recombinant (rDNA) & Synthetic Nucleic Acid Molecules
- Infectious, Parasitic or Other Biohazardous Agents/Organisms
- Select Agents and Toxins (includes exempt quantities)
- Human Subject Materials (human/non-human primate blood, body fluid, cell lines, fixed/unfixed tissue or Other Potentially I also require IRB Approval)

Requires Additional Approvals:

- Laboratory Animal Care (requires IACUC Approval)
- Human Research (requires IRB Approval)
- Export Controls (ITARS/EARS) (OSP Approval)
- Radioactive materials or radiation producing equipment (notify MBL Biosafety Officer)

Additional Requirements not requested in the proposal budget

Please mark all that apply and briefly describe (NOTE: requires DDR approval; COO as FYI only)

- Fabricated Equipment
- Additional Space (include square feet)
- Alterations to current space
- * Description Renovations to lab needed to complete scope of work
- * I acknowledge that COO will be notified.
- Graduate or Undergraduate students

Certifications and Approvals

PRINCIPAL INVESTIGATOR(S): I certify;

1. that the information submitted within the application referenced here by Project Title and Deadline or Submission Date is accurate;
2. and acknowledge that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties;
3. and agree to accept responsibility for the scientific conduct of the project and to provide all required reports if a grant is awarded as a result of this application.

Certification of Conflict of Interest: I also certify;

1. that an annual Conflict of Interest (COI) form has been filed with the MBL for myself and all Key Personnel listed on this application;
2. and that if there are any changes in the COI pursuant to this application, an updated COI will be submitted prior to the expenditure of any federal funds awarded as a result of this application

Yes No * Are there any changes in the COI pursuant to this application?

* I do hereby certify that all of the information above is true, complete, and accurate to the best of my knowledge

To complete review process, select the appropriate decision in the Reviewer Dashboard to continue the internal routing process.

The screenshot shows a web interface for reviewing a proposal. On the left is a vertical navigation menu with the word 'ROUTE' written vertically. The main content area is titled 'Proposal - Initial Application' and includes the following details:

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Center Administrator

As the designated Center Administrator for the PI, you will receive a notification to review once the PI has approved the proposal.

Please access the proposal and verify that the PSF form is complete and has been certified by the PI.

Certifications and Approvals

PRINCIPAL INVESTIGATOR(S): I certify;

1. that the information submitted within the application referenced here by Project Title and Deadline or Submission Date is accurate;
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3. and agree to accept responsibility for the scientific conduct of the project and to provide all required reports if a grant is awarded as a result of this application.

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2. and that if there are any changes in the COI pursuant to this application, an updated COI will be submitted prior to the expenditure of any federal funds awarded as a result of this application

Yes No * Are there any changes in the COI pursuant to this application?

* I do hereby certify that all of the information above is true, complete, and accurate to the best of my knowledge

If certification is not complete, please have the PI log back into the record and complete this step. To continue the routing process, please select a decision in the Reviewer Dashboard.

Center Director

As Center Director, you will receive emails and messages in the InfoEd system when a PI in your department is preparing a proposal for submission. From the message you received from InfoEd, please access the Reviewer Dashboard using the link provided. From here, you will have an option to review a set of documents and a link to the proposal record in the InfoEd system.

The screenshot shows the Reviewer Dashboard for a proposal. On the left, there is a vertical navigation menu with buttons for REVIEW, HELP, and ROUTE. The main content area displays the following information:

Proposal - Initial Application
Number: [P003101](#)
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Please Review items within the Form/Document list:

- Budget attachment
- Budget Justification
- Scope of Work attachment

Project details, such as regulatory issues, space requests, etc. are in the Proposal Summary Form within the proposal record itself. To access the Proposal Development Record, click the "Proposal Development Record".

This screenshot is similar to the one above but highlights the "Proposal Development Record" link in the table with a red box. The rest of the interface, including the navigation menu and the "Add Comments:" section, is visible but not highlighted.

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Done

Save

Test for routing guide

Pete Investigator - Other Research (National Institute of Mental Health/NIH/DHHS)

- ✓ Setup Questions
- Budget
- Personnel
- Proposal Summary Form**
- Uploads and Approvals
- Finalize

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Proposal Summary Form

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* Application Type

Research

Announcement

Number

(FOA #, PA # or RFA#)

Proposal Due Date

Key Personnel Data

Personnel

PI	Name	Department
✓	Investigator, Pete	Other Research

To complete review process, return to the Reviewer Dashboard and select the appropriate decision to continue the internal routing process.

Proposal - Initial Application

Number: P003101

Title: Test for routing guide

Sponsor: National Institute of Mental Health/NIH/DHHS

Submitted:

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Add Comments:

To be shared with everyone

B I U [List Icon] [Link Icon] [A]

Select a decision:

Approved

Conditionally approved

Rework needed

Will not approve

Office of Sponsored Programs

OSP will receive the notification to review the draft proposal documents approximately 10 days prior to submission deadline.

It is OSP's responsibility to review:

- Budget for both allowability, compliance with MBL and sponsor guidelines, and completion
- Budget justification for completeness, compliance, and formatting
- Scope of work for feasibility and compliance with MBL and sponsor guidelines
- PSF form for regulatory concerns, cost share, space requirements, under recovery, COI applicability, and any other potential areas of concern

OSP will also review the funding opportunity announcement to check against the draft documents for congruency and compliance. Please refer to the OSP internal resources for detailed checklists and review procedures.

OSP can submit feedback on the proposal via comments in the reviewer dashboard or contact the PI/Center Administrator directly to seek clarification or to discuss any concerns discovered during review.

Director of Finance

The Director of Finance will be notified if a proposal is requesting cost share. Cost share details will be indicated in two areas: 1) the detailed budget attachment, and 2) the Proposal Summary Form. The Proposal Summary Form will include the cost centers which are selected to absorb the cost share.

From the message you received from InfoEd, please access the Reviewer Dashboard using the link provided. From here, you will have an option to review a set of documents and a link to the proposal record in the InfoEd system.

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Add Comments:
To be shared with everyone

Select a decision:

Approved

Conditionally approved

Rework needed

Will not approve

Please Review items within the Form/Document list:

- Budget attachment
- Budget Justification
- Scope of Work attachment

To access the Proposal Development Record, click the “Proposal Development Record”.

Form/Document	Docume
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Budget.xls	Proposal Supporting D
Scope of Work.docx	Proposal Supporting D

Add Comments:

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Done Save

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- Budget
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* Application Type

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Announcement

Number

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Proposal Due Date

Key Personnel Data

Personnel

PI	Name	Department
✓	Investigator, Pete	Other Research

Cost share details are broken out by category and the associated cost centers and proposed dollar amounts are available in adjacent fields.

Budget Information and Intellectual Property Issues

Yes No Is the F&A Rate requested less than the MBL Federally negotiated rate?

Please explain and include the rate: (NOTE: requires DDR approval; DF as FYI only)

Sponsor limited to 15%

Yes No Does this proposal include any proprietary information the MBL should protect?

Yes No Is Cost Sharing Proposed For this Project?

Drift:

Cost Share Detail

Type	Source (Cost Center)	Amount
<input type="checkbox"/> Equipment		
<input checked="" type="checkbox"/> Other Direct Costs	* Other Source <input type="text" value="123456"/>	* Other Amt <input type="text" value="10,000"/>
<input type="checkbox"/> Salary & Fringe (Key)		
<input type="checkbox"/> F&A Indirect Costs		
* Total		<input type="text" value="10,000"/>

To complete review process, return to the Reviewer Dashboard and select the appropriate decision to continue the internal routing process.

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Add Comments:

To be shared with everyone

B *I* U **A** ▼

Text input area for adding comments.

Select a decision:

- Approved
- Conditionally approved
- Rework needed
- Will not approve

Director of Research

The Director of Research will receive notifications that a review is necessary if the proposal includes potential under recovery, cost sharing, and/or requests for additional space or modifications to existing space. Under recovery, as well as additional regulatory issues, cost sharing, space requirements, etc. are detailed in the Proposal Summary Form within the proposal record.

From the message you received from InfoEd, please access the Reviewer Dashboard using the link provided. From here, you will have an option to review a set of documents and a link to the proposal record in the InfoEd system.

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Please Review items within the Form/Document list:

- Budget attachment
- Budget Justification
- Scope of Work attachment

To access the Proposal Development Record, click the "Proposal Development Record".

This is a close-up screenshot of the 'Form/Document' list from the previous image. The 'Proposal Development Record' link is highlighted with a red rectangular box. The other links in the list are 'Budget Justification.docx', 'Budget.xls', and 'Scope of Work.docx', all of which are also underlined and blue.

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Done

Save

Test for routing guide

Pete Investigator - Other Research (National Institute of Mental Health/NIH/DHHS)

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* **Application Type**

Research

Announcement

Number

(FOA #, PA # or RFA#)

Proposal Due Date

10-Aug-2019

Key Personnel Data

Personnel

PI	Name	Department
✓	Investigator, Pete	Other Research

Under recovery and cost share details are broken out by category and the associated cost centers and proposed dollar amounts are available in adjacent fields. Details regarding requests of extra space or renovations of existing space are located further down the page.

Budget Information and Intellectual Property Issues

Yes No Is the F&A Rate requested less than the MBL Federally negotiated rate?

Please explain and include the rate: (NOTE: requires DDR approval; DF as FYI only)

Sponsor limited to 15%

Yes No Does this proposal include any proprietary information the MBL should protect?

Yes No Is Cost Sharing Proposed For this Project?

Drift:

Cost Share Detail

Type

Source (Cost Center)

Amount

Equipment

Other Direct Costs

* Other Source

* Other Amt

Salary & Fringe (Key)

F&A Indirect Costs

*** Total**

Additional Requirements not requested in the proposal budget

Please mark all that apply and briefly describe (NOTE: requires DDR approval; COO as FYI only)

- Fabricated Equipment
- Additional Space (include square feet)
- Alterations to current space

* Description

* I acknowledge that COO will be notified.

To complete review process, return to the Reviewer Dashboard and select the appropriate decision to continue the internal routing process.

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Chief Operating Officer

The Chief Operating Officer will receive notifications when a proposal is underway that includes requests for additional space or renovations to existing space. Details regarding these requests are contained in the Proposal Summary Form within the proposal record.

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☰ Done Save Test for routing guide
Pete Investigator - Other Research (National Institute of Mental Health/NIH/DHHS)

✓ Setup Questions

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* **Application Type**
Research

Announcement Number
(FOA #, PA # or RFA#)

Proposal Due Date 10-Aug-2019

Key Personnel Data

Personnel

PI	Name	Department
✓	Investigator, Pete	Other Research

Additional Requirements not requested in the proposal budget

Please mark all that apply and briefly describe (NOTE: requires DDR approval; COO as FYI only)

- Fabricated Equipment
- Additional Space (include square feet)
- Alterations to current space

* Description

* I acknowledge that COO will be notified.

No action is required on your part, but if you have questions or require further information, please contact OSP.