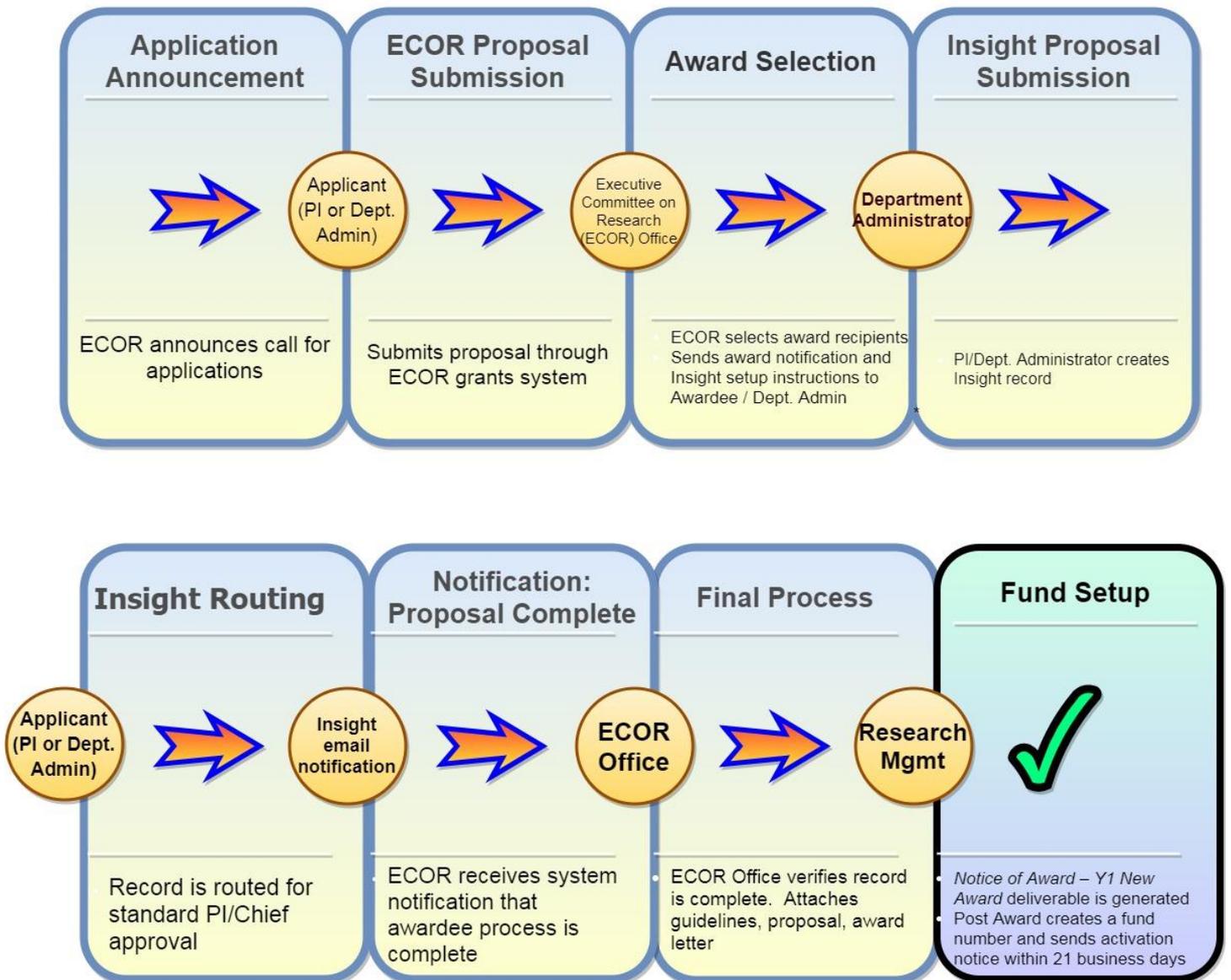


Introduction

The Create New Agreement/Proposal function is used to create a new agreement or proposal to submit to Research Management, Clinical Trials Office (CTO) and Innovation offices for review. Each record type has its own form set, list of required fields per page and workflow. The workflow below shows the proposal and award setup process for Executive Committee on Research (ECOR) Awards only.

Proposal and Award Setup Process for ECOR Awards

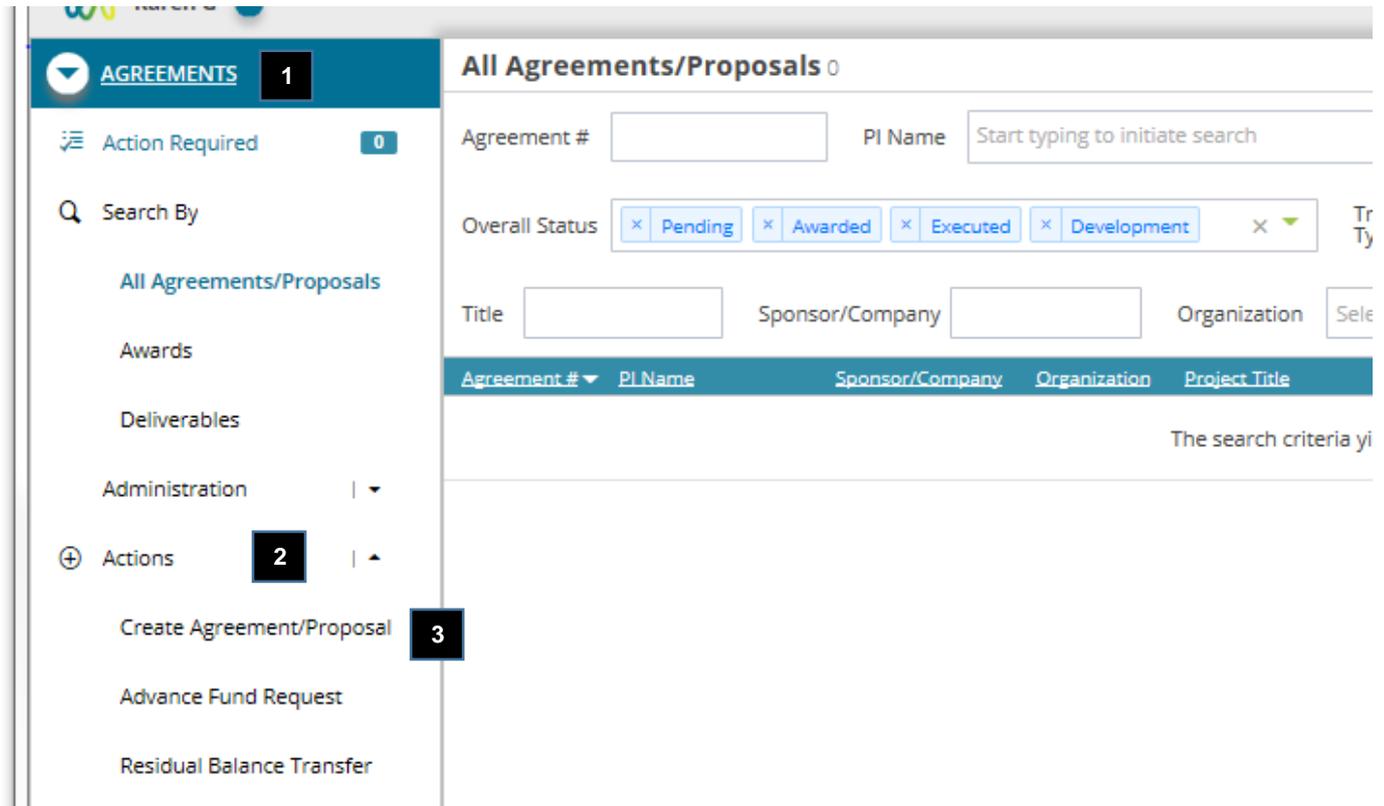


Create New Agreement/Proposal – ECOR Award

Once you have received an Award letter from ECOR (and only if you received an Award letter from ECOR) indicating that you or your Principal Investigator received an ECOR Award, please log into Insight 4.0, open the “Agreements” module and follow the steps below to create an Insight record and initiate the fund setup. Illustrative screenshots are included in the instructions below.

STEPS

1. Click **Agreements**.
2. Expand Actions menu.
3. Select **Create Agreement/Proposal** from the actions menu on the left.



The screenshot displays the 'All Agreements/Proposals' page in the Insight 4.0 system. On the left-hand side, there is a navigation menu. The 'AGREEMENTS' section is highlighted with a '1' in a black box. Below it, the 'Actions' menu is expanded, showing several options. The 'Create Agreement/Proposal' option is highlighted with a '3' in a black box, and the 'Actions' menu itself is indicated with a '2' in a black box. The main content area features search filters for 'Agreement #', 'PI Name' (with a search prompt 'Start typing to initiate search'), 'Overall Status' (with tags for Pending, Awarded, Executed, and Development), 'Title', 'Sponsor/Company', and 'Organization'. Below the filters is a table header with columns: Agreement.#, PIName, Sponsor/Company, Organization, and Project Title. The table body is currently empty, showing only the text 'The search criteria yi'.

4. Select the radio button option **Sponsored Research Proposal** for the record type you need to create.
5. Select the radio button option **New** for the proposal type.
6. Select **No**. The ECOR award is not for a multi-project research program.
7. Select the Principal Investigator (PI) by entering the first or last name or the Username/NT Login.
8. Confirm or update the organization/department for the record. Please select the Principal Investigator's Chief Code. Do not use or select ECOR's Chief Code.
9. Click **Create Agreement**.

Tell Us About Your Submission

INSTRUCTIONS: Please select the one record type below that best suits the needs of your proposal or new agreement. If you need help identifying the right record, please contact the Triage Team in the [Contracting Guidelines](#) or [click here](#) to use a step by step guide to selecting your record type.

<div style="background-color: #00728f; color: white; padding: 5px; margin-bottom: 5px;">Research Management (RM):</div> <p style="font-size: x-small; margin: 0;">works with non-profit, foundation and government (Federal, State, Local, international) entities on all types of research</p> <div style="background-color: #00a0c9; color: white; padding: 2px; margin-bottom: 5px;">Non-Profit/Government</div> <ul style="list-style-type: none"> <input checked="" type="radio"/> Sponsored Research Proposal 4 <input type="radio"/> Confidentiality (CDA) <input type="radio"/> Data Use (DUA) <input type="radio"/> Other Unfunded Research <input type="radio"/> Billing Agreement (Incoming) <input type="radio"/> Research Sundry 	<div style="background-color: #666; color: white; padding: 5px; margin-bottom: 5px;">Clinical Trials Office (CTO):</div> <p style="font-size: x-small; margin: 0;">works with for-profit entities on clinical research activities</p> <div style="background-color: #999; color: white; padding: 2px; margin-bottom: 5px;">Industry Clinical</div> <ul style="list-style-type: none"> <input type="radio"/> Clinical Trial Agreement (CTA)/ Clinical Research Support (CRSA) <input type="radio"/> Confidentiality (CDA) - Clinical <input type="radio"/> Data Use (DUA) - Clinical <input type="radio"/> Drug Donation <input type="radio"/> SBIR/STTR - Clinical 	<div style="background-color: #90ee90; padding: 5px; margin-bottom: 5px;">Innovation:</div> <p style="font-size: x-small; margin: 0;">works with for-profit entities on non-clinical research and material transfer with all parties</p> <div style="background-color: #e0f0e0; padding: 2px; margin-bottom: 5px;">Industry Non-Clinical and MTAs</div> <ul style="list-style-type: none"> <input type="radio"/> Sponsored Research (SRA) <input type="radio"/> Confidentiality (CDA) - Non-Clinical <input type="radio"/> Data Use (DUA) - Non-Clinical <input type="radio"/> Material Transfer <input type="radio"/> SBIR/STTR - Non-Clinical
--	---	--

Please select your proposal type

- New 5
- Transfer In
- Resubmission
- Supplement
- Competing Renewal

Is this record for a multi-project research program involving a number of independent investigators who share knowledge and common resources (AKA Program Project)?

Yes No 6

Who is the Principal Investigator (PI) for this agreement?

Markmann, James F (JFM36)
x ▼

7

Please confirm the correct organization/department for this record

Transplant Surgery 56EA MGH
x ▼

8

IMPORTANT NOTE:

Please verify that the record selection that you have made above is correct. The record type cannot be changed once it has been initiated.

9

Cancel
Create Agreement

10. Confirm the organization/department for the second time (final time). Please select the Principal Investigator's Chief Code. Do not use or select ECOR's Chief Code.
11. Enter the title of the research project.
12. Select the location (building and floor) where the majority of the work will be performed.
13. Select **No** if the project will not include a subcontract(s) to other institutions. **Note:** Subcontracts on ECOR grants are rare and require prior approval.
14. Click **Next**.

PI: Markmann, James F (JFM36)	Sponsor:	Agreement #: 201/A053/U/
Fund #:	Project Period:	Record Type: RM - Funded Agreement more ▾

Agreement Details

Please confirm the correct organization/department for this record

10

Enter a title

11

Please select the location where the majority of the work will be performed

Select building and floor

12

Or enter an offsite location

Based on the selected location, the research is determined to be conducted: Onsite

Will this project include subcontracts to other institutions?

Yes
 No

13

Undesignated Agreement

RSS Agreement

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14

Next >

15. Select **No**. This agreement is not under another organization’s award.
16. Select the Immediate Sponsor referenced in the Principal Investigator’s award letter from ECOR.
17. Enter the sponsor deadline date as referenced in the Principal Investigator’s award letter from ECOR.
18. Enter the major goals of the project (optional). The information used will populate Other Support documents generated by Insight.
19. Upload a copy of the Call for Applications used to apply for the award/prize.
20. Select **Yes**. This is an Executive Committee on Research (ECOR) funded project. If **Yes** is not selected, the record will route to the pre-award administrator (Pre GA) affiliated with the chief code. The Pre GA will need to route the record back to the Department Administrator to correct the field.
21. Click **Next**.

Sponsor Details

Is your agreement a subcontract under another organization's award?

Yes
 No 15

Please select an Immediate Sponsor

MGH ECOR Formulaic Support
x
▼

Type: Internal 16

Please enter the sponsor deadline information

12/07/17
x
📅

17

What are the major goals of the project?

Enter the major goals of the project here.

18

Please upload a copy of the opportunity guidelines

announcement_Formulaic 18-1.docx
Uploaded
x

19

File has been uploaded!

Is this a Executive Committee on Research (ECOR) funded project?

Yes
 No 20

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Next >

22. Answer the Compliance questions as it applies to the research project awarded and click **Next**. (The screenshot below is an example only)

Compliance

Does this project include the use of Human Subjects?
 Yes No

Does this project include the use of Animals?
 Yes No

Does this project include the use of Biohazard Materials (Infectious Agents/Human Materials)?
 Yes No

Does this project contain Radiation/Isotope Use?
 Yes No

Does this project use Recombinant DNA?
 Yes No

Is this project Cancer related?
 Yes No

Does this project include the use of Human Embryonic Stem Cells?
 Federal
 Non-Federal
 None

Will information, materials or equipment be shipped/transmitted (e.g. via email) outside the country?
 Yes No

22

- 23. Enter the Start Date and End Date of the project as noted in the Award letter from ECOR.
- 24. Select **Yes** or **No** regarding the creation of a detailed budget and answer the secondary questions, if any.
- 25. Click **Next**.

Budget Configuration
[+ Add Additional Period](#)

Total Direct Costs: \$0	Total Indirect Costs: \$0	TOTAL COSTS: \$0
--------------------------------	----------------------------------	-------------------------

	Start Date	End Date	
Period 1	<input style="width: 100%;" type="text" value="01/01/2018"/> × 	<input style="width: 100%;" type="text" value="12/31/2018"/> × 	23

Would you like to create a detailed budget for this record at this time?

Yes
 No
 24

A detailed budget is not required at submission time.

If you select No you will be presented with an included and excluded directs line items only to complete for your submission. A detailed budget can be completed at a later time.

If you select Yes you will be presented with the option to break down your direct costs per line item.

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26. Select Activity Type: Clinical Research, Non-Clinical Research or Training/Fellowship. Select “Training/Fellowship” for all Tosteson and Fund for Medical Discovery (FMD) Research Fellowship Awards.
27. Select Rate Agreement **Other**.
28. Select Base **MTDC**.
29. Select **No**. The sponsor does not have a published policy with respect to indirect costs.
30. Enter **15%** for the indirect cost rate per period.
31. Select **No**. This agreement does not require exclusions from our standard indirect cost base.
32. Select **No**. This proposal does not require cost sharing.
33. Click **Next**.

Facilities & Administrative Details

Total Direct Costs: \$0	Total Indirect Costs: \$0	TOTAL COSTS: \$0
-------------------------	---------------------------	------------------

Select Activity Type **26**

Clinical Research
 Non-Clinical Research
 Training / Fellowship

Selected Rate Agreement:

Other
▼

27

Base:

MTDC
▼

28

Does the sponsor have a published policy with respect to indirect costs?

Yes No **29**

Enter the indirect cost rate per period

Period	Rate	
01/01/18 - 12/31/18	15	%

30

Does this agreement require exclusions from our standard indirect cost base?

Yes No **31**

Does this proposal include cost sharing?

Yes No **32**

IDC Recovery Type:
Sponsor Specific Published Rate

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Next >

- 34. Enter the **Direct Cost amount of the award or a Detailed Budget**. The need to enter the Direct Costs only or a full Detailed Budget will depend on the response to item #24.
- 35. Click **Next**

Budget Details
[+ Add Additional Direct Cost](#)

Total Direct Costs: \$0	Total Indirect Costs: \$0	TOTAL COSTS: \$0
Category/Account	Period 1	Total
<input type="checkbox"/> OTHER EXPENSES		\$0
<input type="text" value="952200 Other Outside Service"/>	<input type="text" value="\$75,000"/>	\$0 34
<input type="text" value="955350 For Research Budgets Only"/> (Ex)	<input type="text" value="\$0"/>	\$0
Total Direct Costs	\$0	\$0
MTDC	\$0	\$0
Total Indirect Costs	\$0	\$0
TOTAL COSTS	\$0	\$0

reements/agreements
35
Next >

- 36. Select the **Type** and **Role** for each staff member on the project
- 37. Click “**Add New Staff**” as needed to enter additional staff names, types and their roles
- 38. Click **Next**

Staff

37 [+ Add New Staff](#)

Name	Organization	Type	Role	Process	
Markmann, James F	MGH > Transplant Surgery	Key Personnel ▼	PD/PI ▼	IR	36 ×

agreements/2017A053707/latest/project-information/staff

38 Next >

- 39. Enter the effort for the Principal Investigator. Enter the effort for all other personnel listed.
- 40. Click **Next**.

Details			
Name	Type	Process	Effort
Markmann, James F	Key Personnel	IR	<div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 2px; margin-right: 5px;">15</div> % </div>

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40
Next >

41. Click Next. Do not upload additional documents. ECOR will upload the remaining required documents, e.g. award letter, proposal, etc.)

Attachments 1

+ Drag & Drop files here or [select files from computer](#)

+ Proposal Related Documents 1

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- 42. Click **Assign** and select the appropriate department administrator name from the dropdown list.
- 43. Click **Save**.

Contacts							
Role	Name	ID	Email Address	Phone	Process	Primary	
Department Contact						42	<input type="button" value="Assign"/>
Chief/Chair	Markmann, James F	JFM36	JMARKMANN@mgh.harvard.edu	(617)-643-4533	IR		
Pre Award Grant Administrator	Vallese, Theresa	TV043	TVALLESE@PARTNERS.ORG	(857)-282-1709	IR		
Post Award Grant Administrator	Cohen, Rachel S	RSC22	RCOHEN0@PARTNERS.ORG	(857)-282-1685	IR		
Post Award Agreement Associate	Corsaro, Nicholas	NC728	NCORSARO@PARTNERS.ORG	(857)-282-1840	IR		
Research Finance Specialist	Sullivan, Michael D	MDS41	MSULLIVAN38@PARTNERS.ORG	(781)-223-5870	IR		
CTO Agreement Associate	StPierre, Stephanie	SZ595	SASTPIERRE@PARTNERS.ORG	(857)-282-1853	IR		
CTO Financial Analyst	Bernardo, Sarah	SB203	SBEDNAR@PARTNERS.ORG	(857)-282-1887	IR		
Innovation TAG Associate	Stone, Stephanie	SEW33	SESTONE@PARTNERS.ORG	(857)-282-1843	IR		
Innovation Licensing Manager	Bakhshi, Farnaz	FRB5	FBAKHSHI@PARTNERS.ORG	(857)-307-2439	IR		

Contacts							
Role	Name	ID	Email Address	Phone	Process	Primary	
Department Contact	Burke, Sarah E (SEC54)					43	<input type="button" value="Cancel"/> <input type="button" value="Save"/>
Chief/Chair	Markmann, James F	JFM36	JMARKMANN@mgh.harvard.edu	(617)-643-4533	IR		
Pre Award Grant Administrator	Vallese, Theresa	TV043	TVALLESE@PARTNERS.ORG	(857)-282-1709	IR		
Post Award Grant Administrator	Cohen, Rachel S	RSC22	RCOHEN0@PARTNERS.ORG	(857)-282-1685	IR		
Post Award Agreement Associate	Corsaro, Nicholas	NC728	NCORSARO@PARTNERS.ORG	(857)-282-1840	IR		
Research Finance Specialist	Sullivan, Michael D	MDS41	MSULLIVAN38@PARTNERS.ORG	(781)-223-5870	IR		
CTO Agreement Associate	StPierre, Stephanie	SZ595	SASTPIERRE@PARTNERS.ORG	(857)-282-1853	IR		
CTO Financial Analyst	Bernardo, Sarah	SB203	SBEDNAR@PARTNERS.ORG	(857)-282-1887	IR		
Innovation TAG Associate	Stone, Stephanie	SEW33	SESTONE@PARTNERS.ORG	(857)-282-1843	IR		
Innovation Licensing Manager	Bakhshi, Farnaz	FRB5	FBAKHSHI@PARTNERS.ORG	(857)-307-2439	IR		

44. Click Next.

Contacts
[+ Add Additional Department Contact](#)

Role	Name	ID	Email Address	Phone	Process	Primary	
Department Contact	Burke, Sarah E	SEC54	sarah.burke@mgh.harvard.edu	(617)-726-3709	IR	<input checked="" type="checkbox"/>	Reassign
Chief/Chair	Markmann, James F	JFM36	JMARKMANN@mgh.harvard.edu	(617)-643-4533	IR		
Pre Award Grant Administrator	Vallese, Theresa	TV043	TVALLESE@PARTNERS.ORG	(857)-282-1709	IR		
Post Award Grant Administrator	Cohen, Rachel S	RSC22	RCOHENO@PARTNERS.ORG	(857)-282-1685	IR		
Post Award Agreement Associate	Corsaro, Nicholas	NC728	NCORSARO@PARTNERS.ORG	(857)-282-1840	IR		
Research Finance Specialist	Sullivan, Michael D	MD541	MSULLIVAN38@PARTNERS.ORG	(781)-223-5870	IR		
CTO Agreement Associate	Spierre, Stephanie	SZ595	SASTPIERRE@PARTNERS.ORG	(857)-282-1853	IR		
CTO Financial Analyst	Bernardo, Sarah	SB203	SBEDNAR@PARTNERS.ORG	(857)-282-1887	IR		
Innovation TAG Associate	Stone, Stephanie	SEW33	SESTONE@PARTNERS.ORG	(857)-282-1843	IR		
Innovation Licensing Manager	Bakhshi, Farnaz	FRB5	FBAKHSHI@PARTNERS.ORG	(857)-307-2439	IR		

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