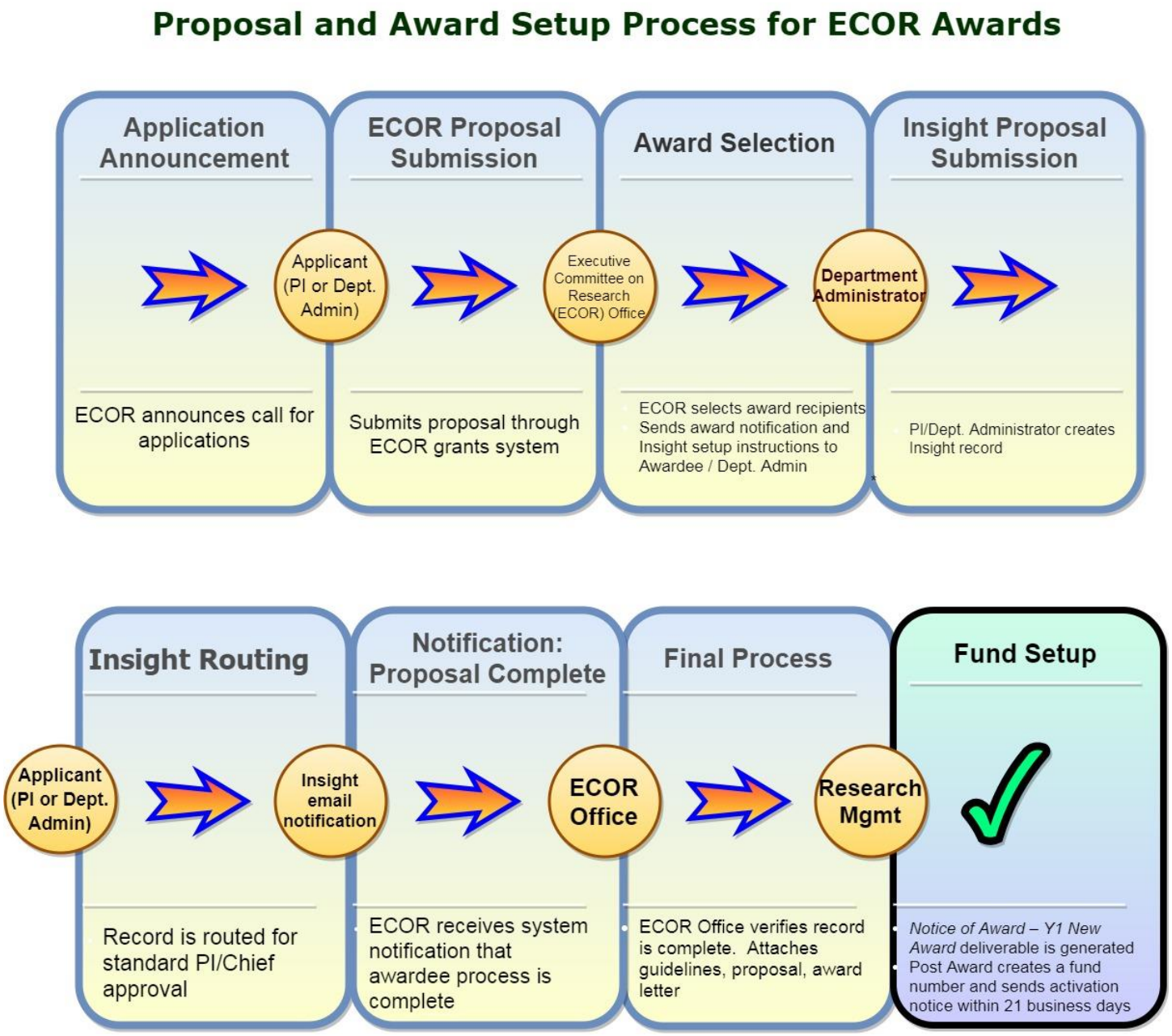
Create New Agreement/Proposal – ECOR Award

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 requried fields per page and workflow. The workflow below shows the proposal and award setup process for Executive Comimttee on Research (ECOR) Awards only.

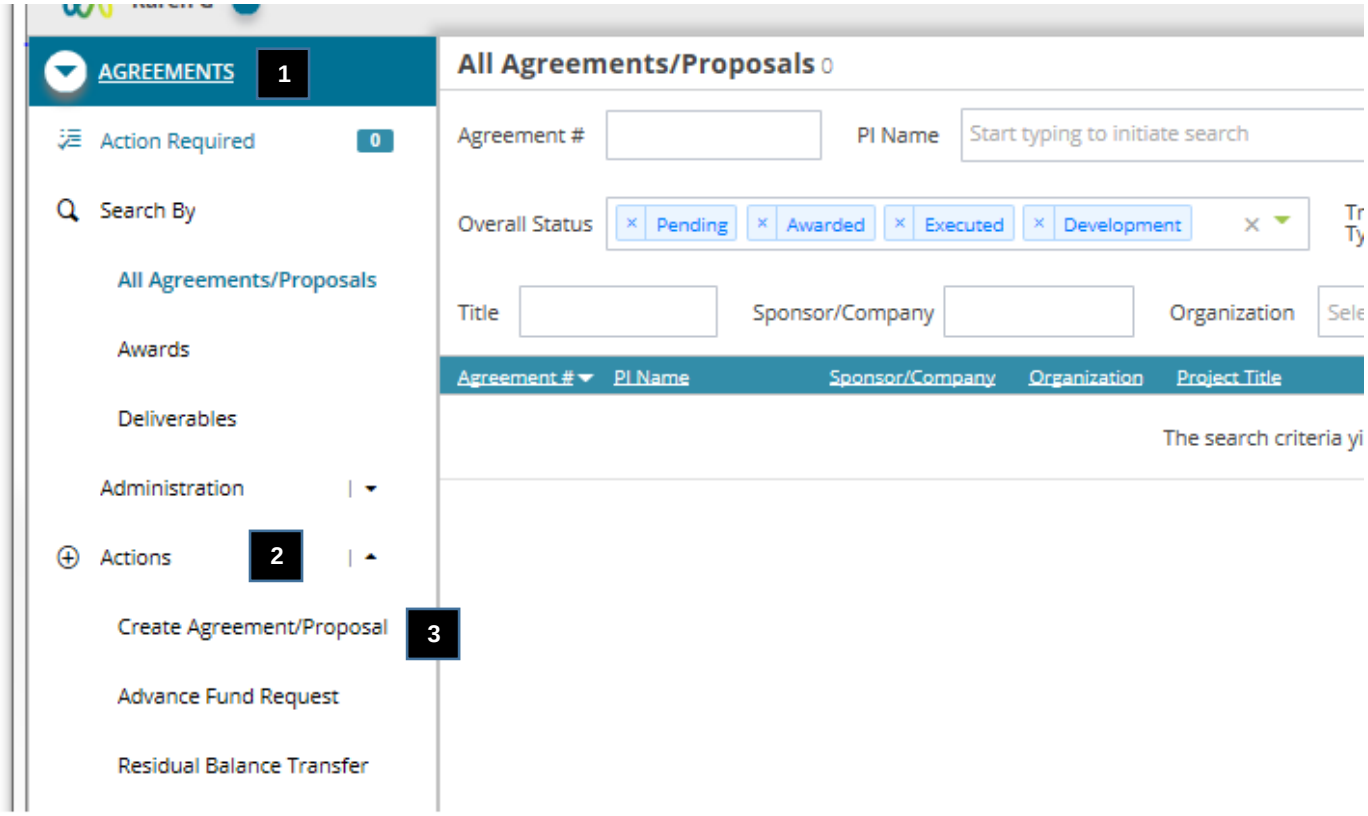


Create New Agreement/Proposal – ECOR Award

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.



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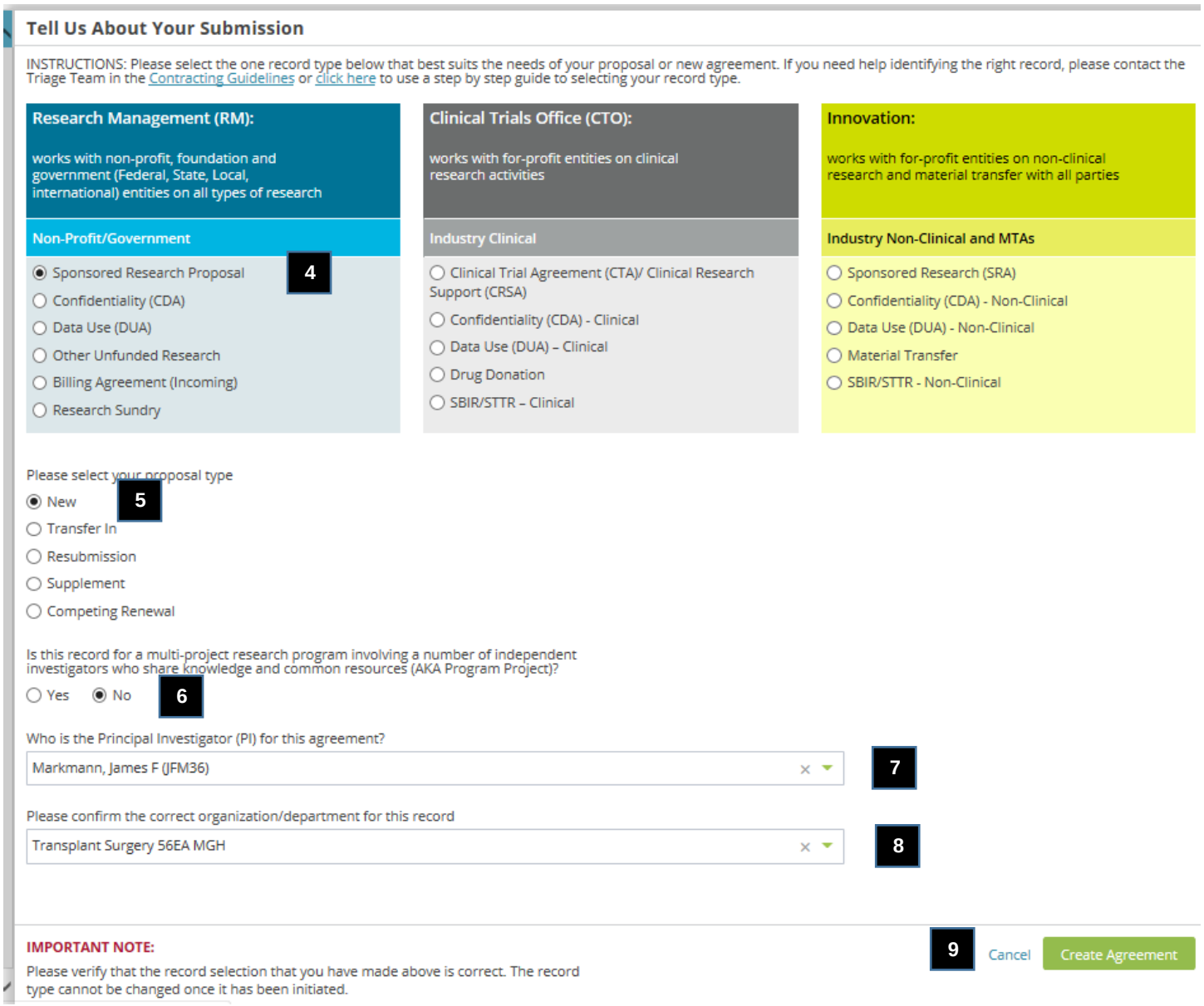
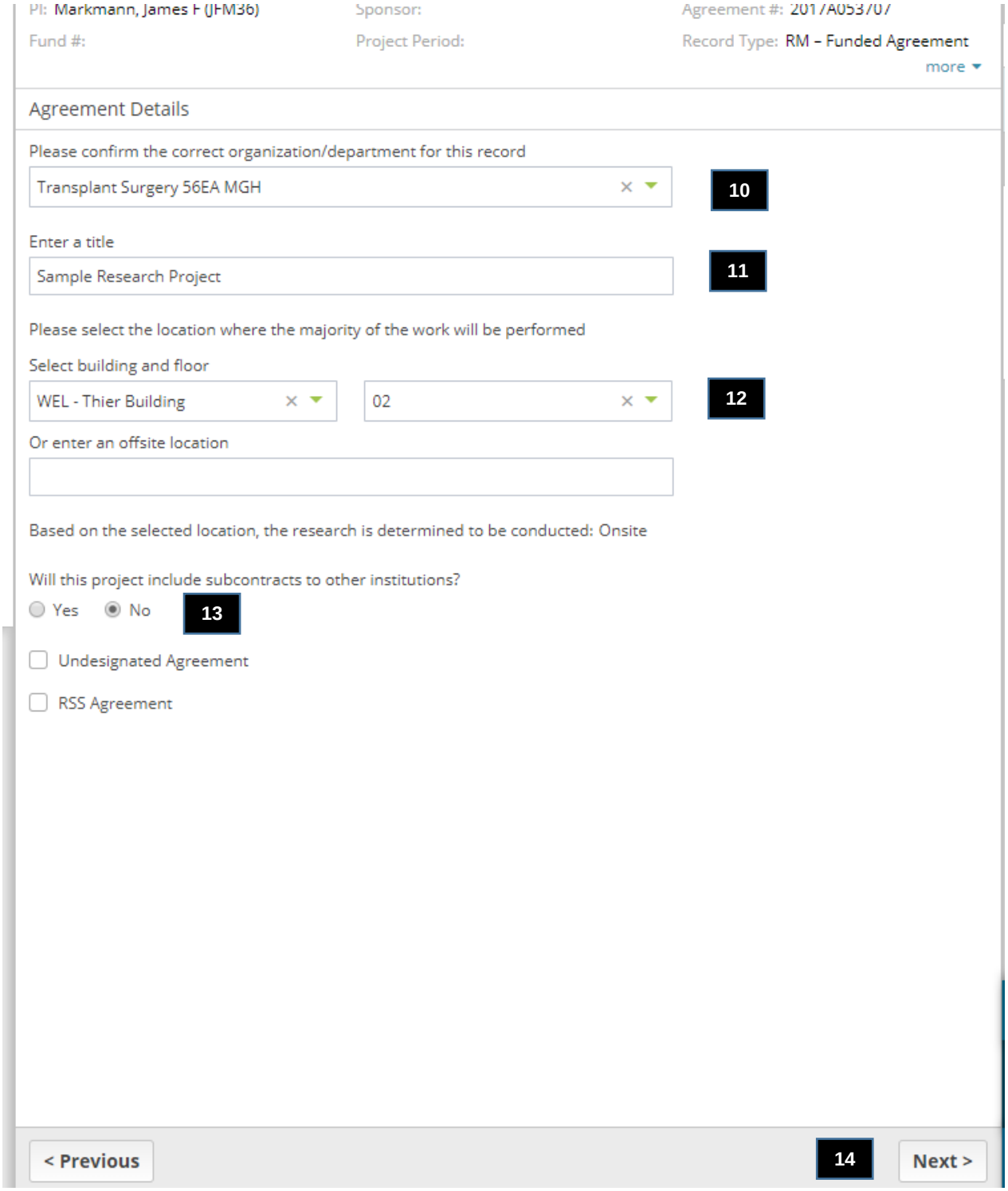
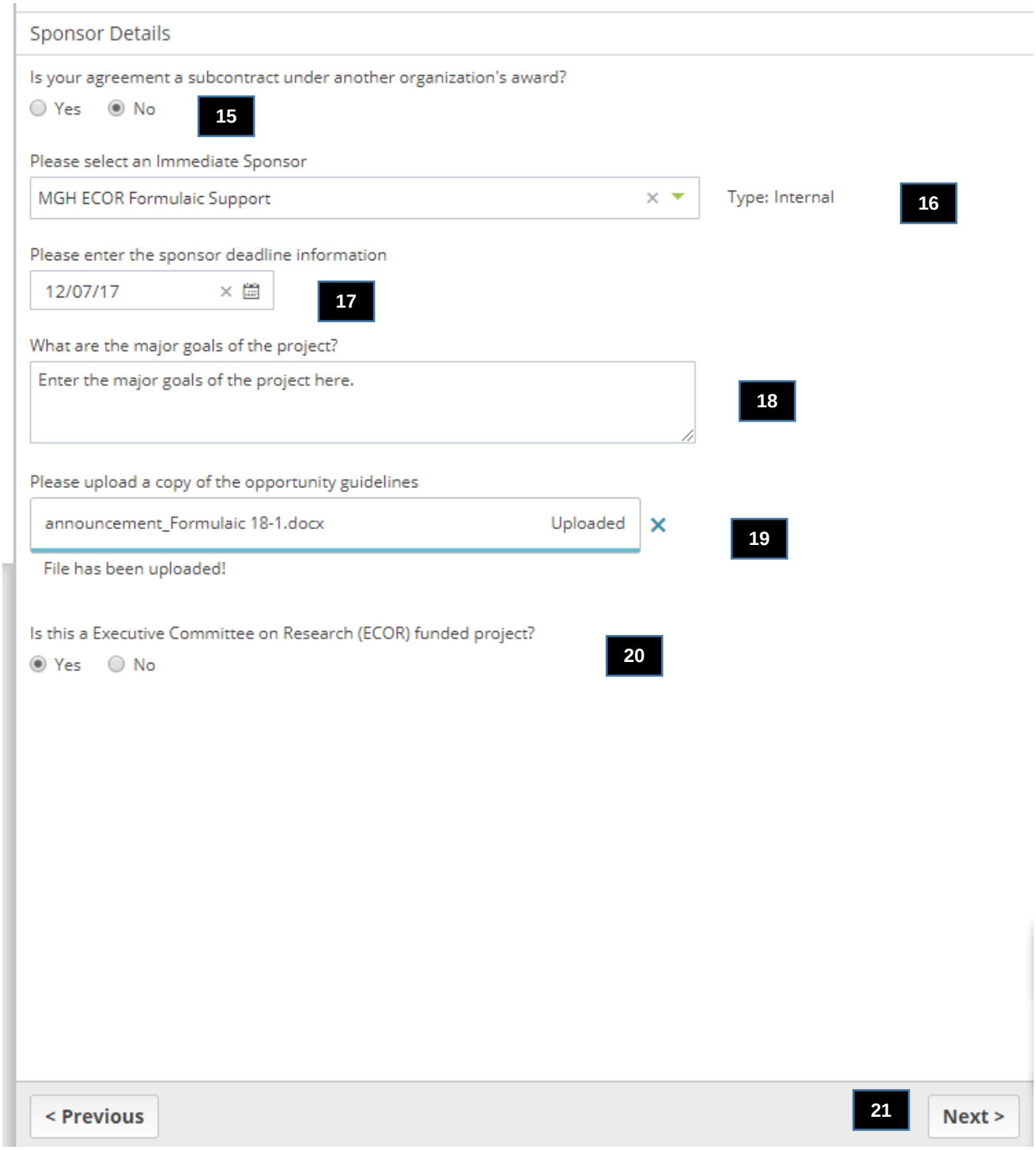
4. Select the radio button option **Sponsored Research Proposal** for the record type you need to create.
5. Select the radio button option **New** for the proposal type.
6. Select **No.** The ECOR award is not for a multi-project research program.
7. Select the Principal Investigator (PI) by entering 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.**



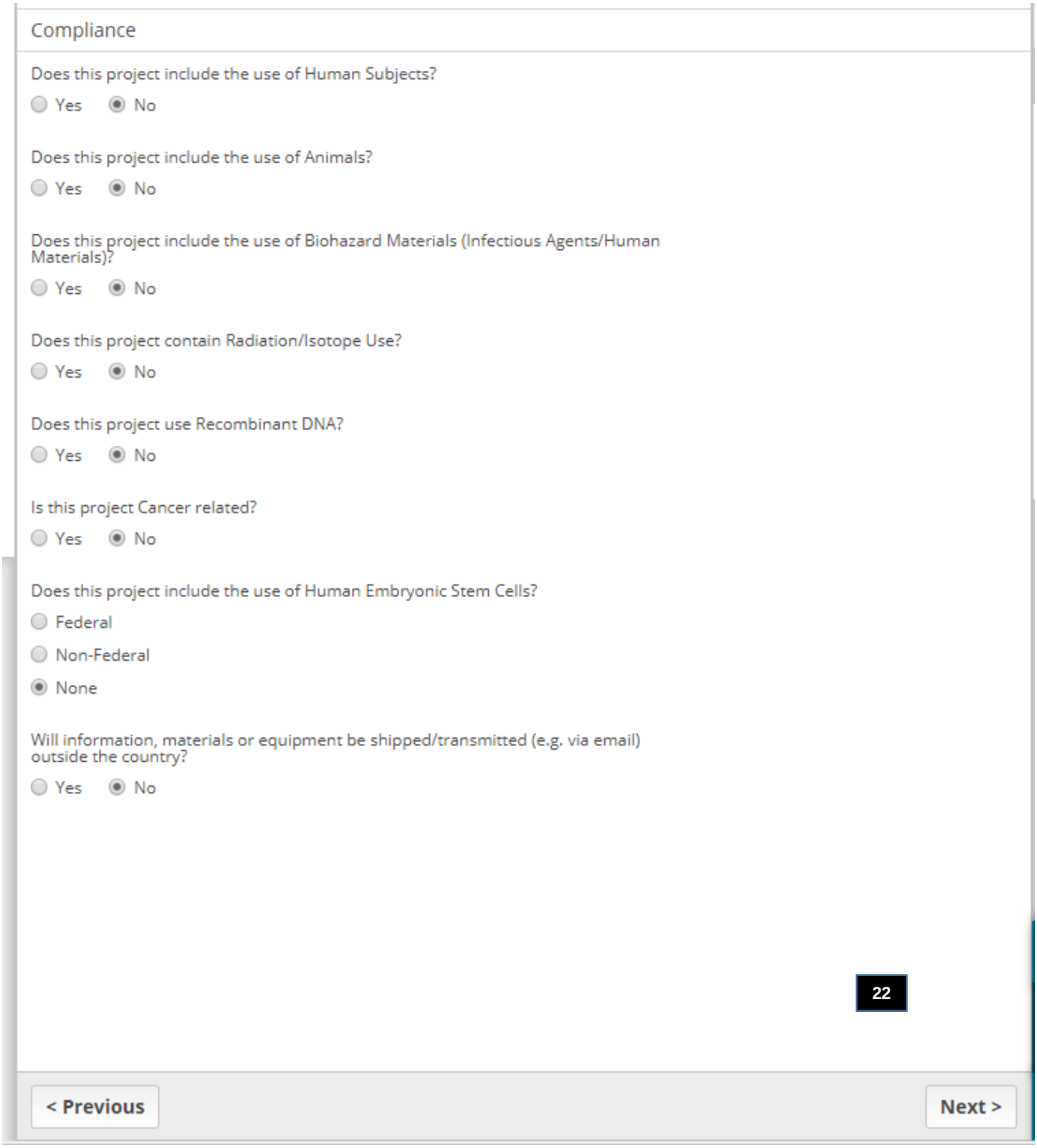
10. Confirm the organization/department for the second time (final time). Please select the Principal Investigator's Chief Code. Do not use or select ECOR's Chief Code.
11. Enter the title of the research project.
12. Select the location (building and floor) where the majority of the work will be performed.
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.**



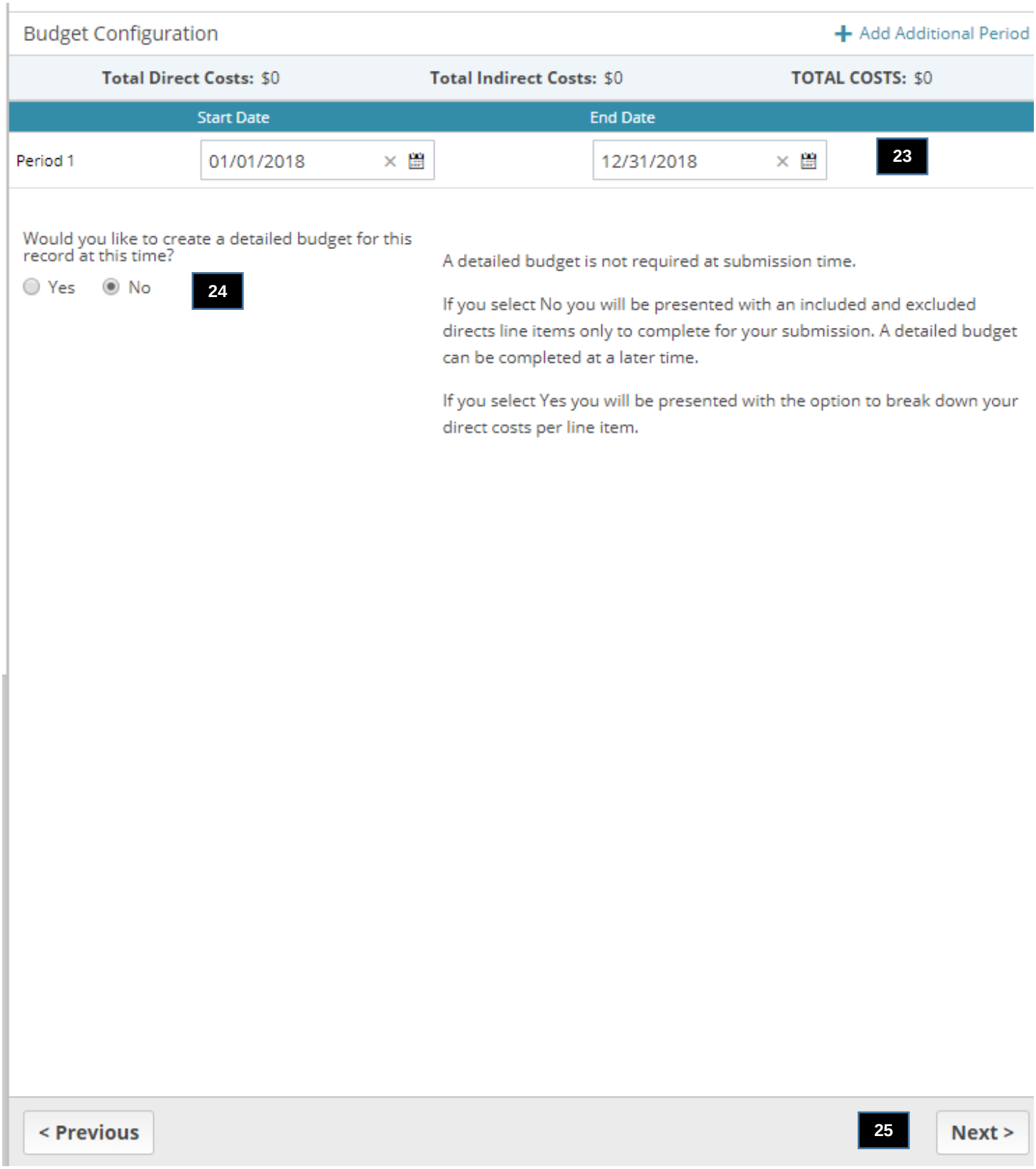
15. Select **No**. This agreement is not under another organization's award.
16. Select the Immediate Sponsor referenced in the Principal Investigator's award letter from ECOR.
17. Enter the sponsor deadline date as referenced in the Principal Investigator's award letter from ECOR.
18. Enter the major 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.**



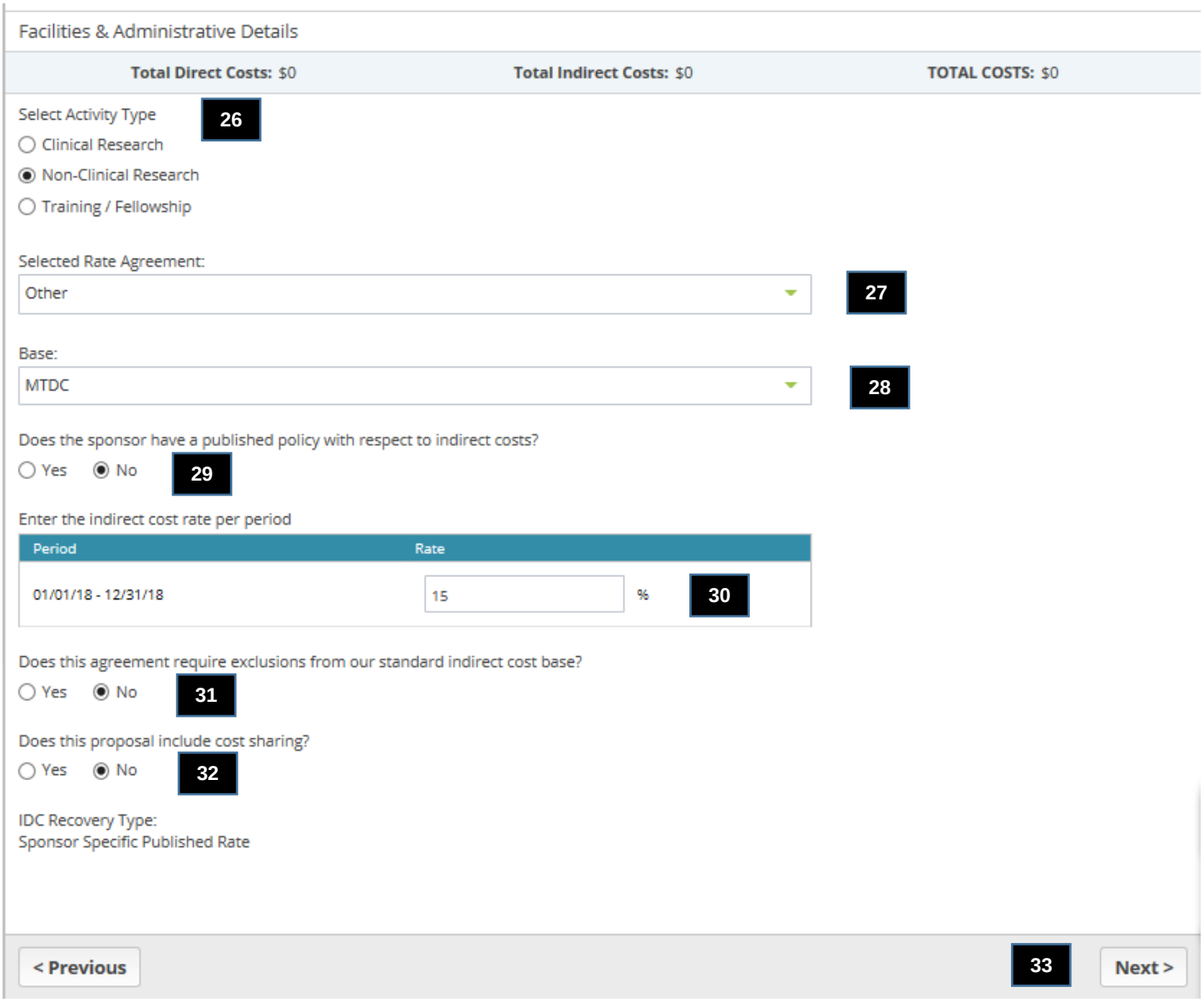
22. Answer the Compliance questions as it applies to the research project awarded and click **Next**. (The screenshot below is an example only)



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.**

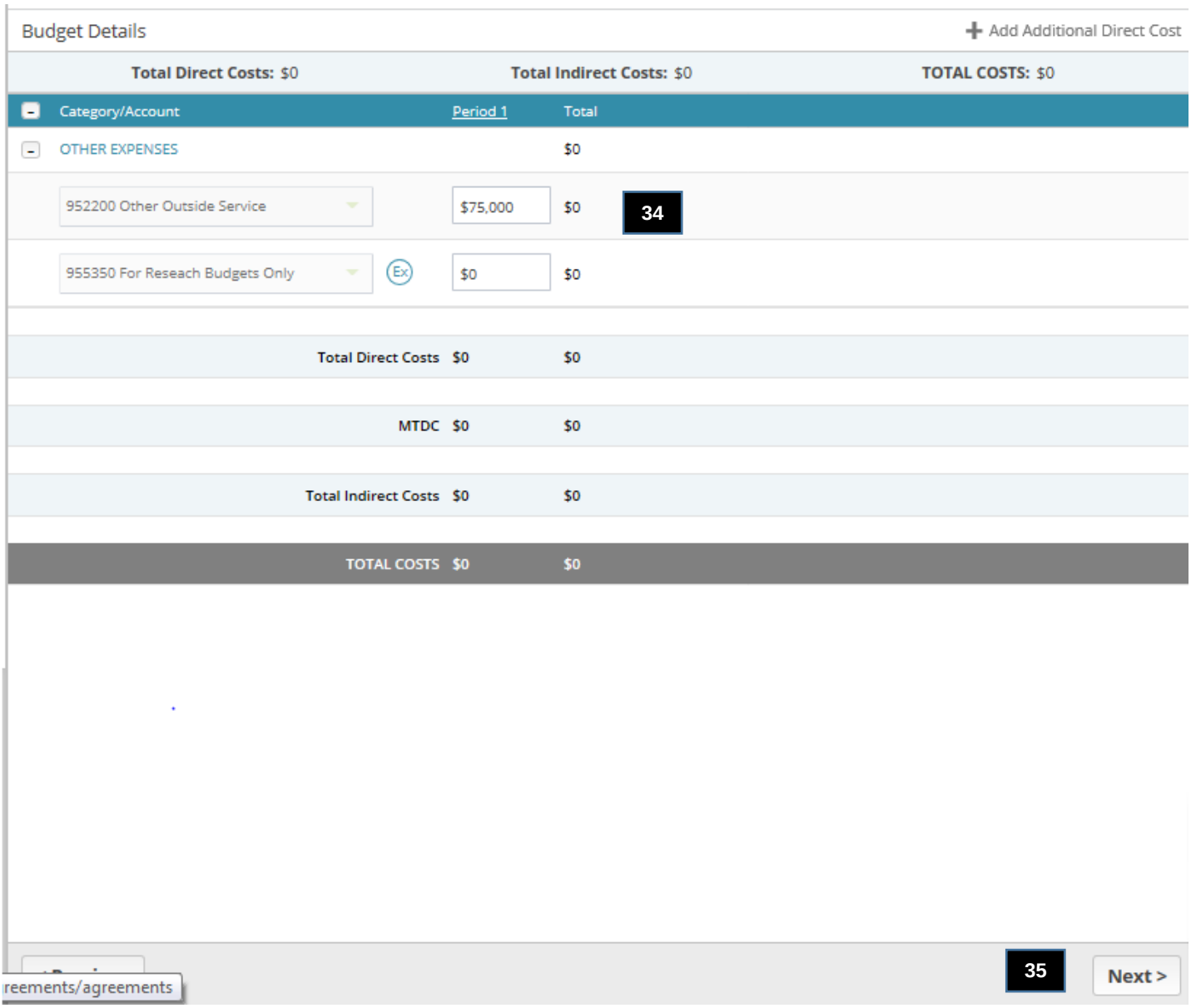


26. Select Activity Type: Clinical Research, Non-Clinical Research or Training/Fellowship. Select "Training/Fellowship" for all Tosteson and Fund for Medical Discovery (FMD) Research Fellowship Awards.
27. Select Rate Agreement **Other.**
28. Select Base **MTDC.**
29. Select **No.** The sponsor does 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.**

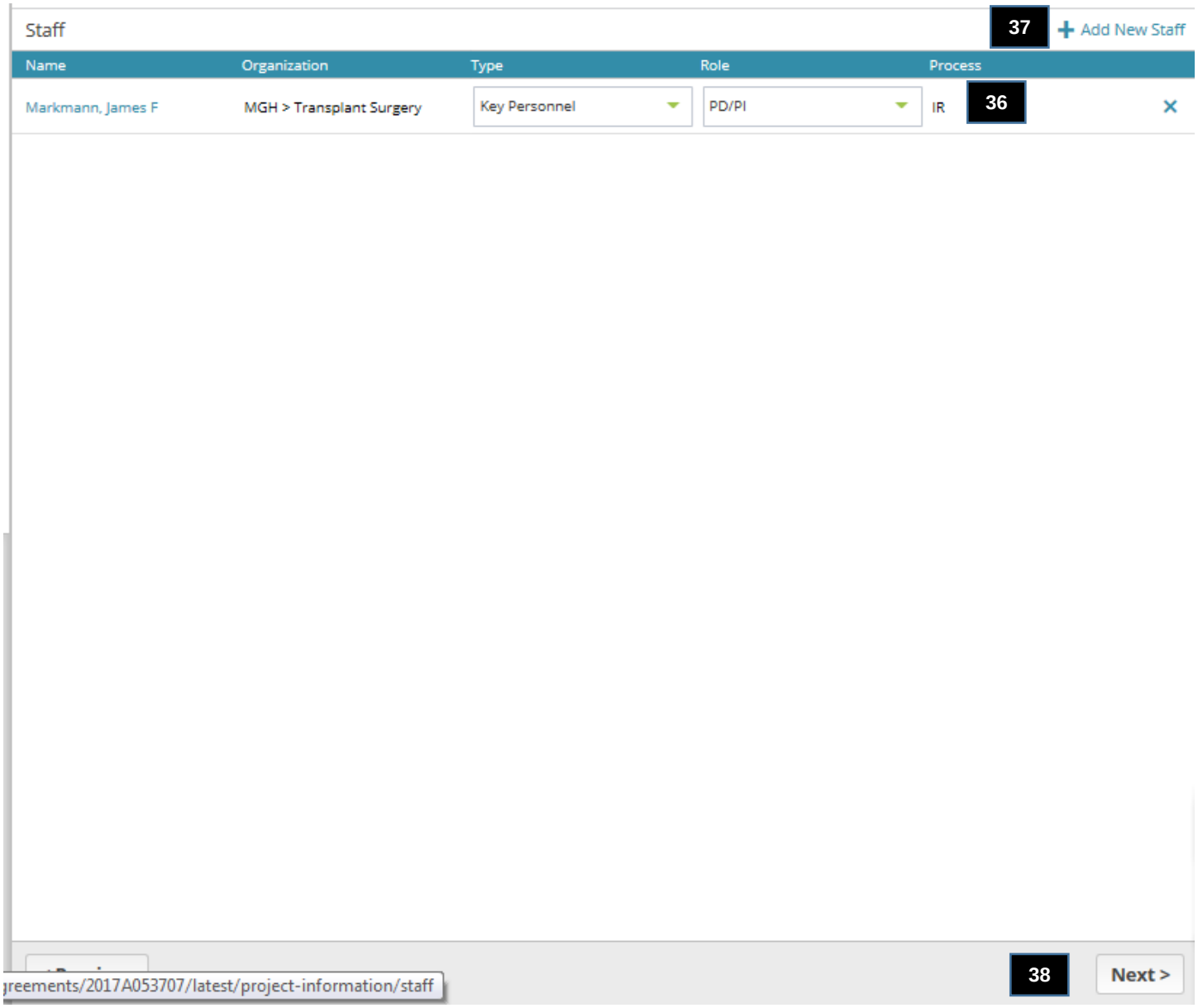


34. Enter the **Direct Cost amount of the award or a Detailed Budget.** The need to enter the Direct Costs only or a full Detailed Budget will depend on the response to item #24.

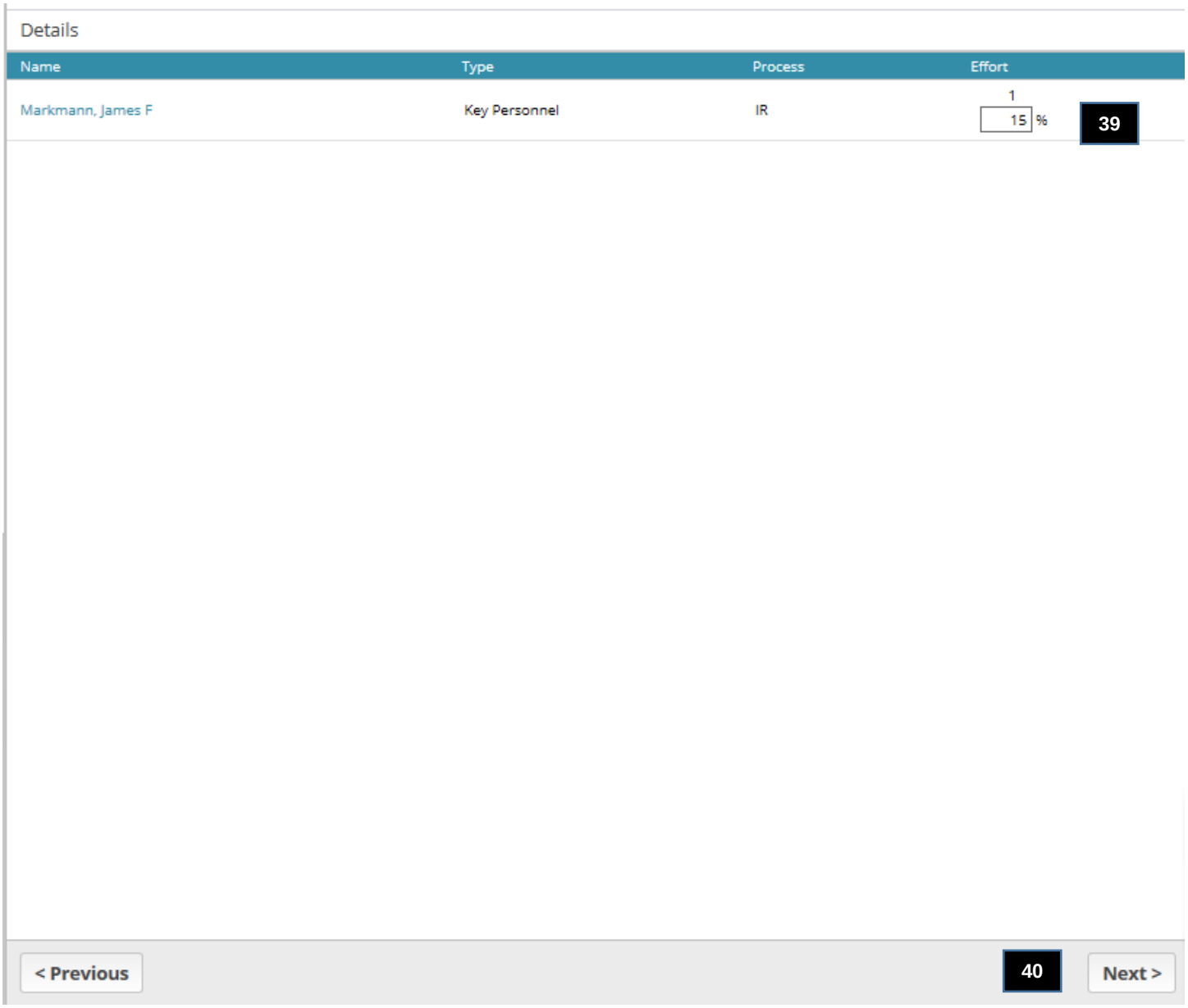
35. Click **Next**



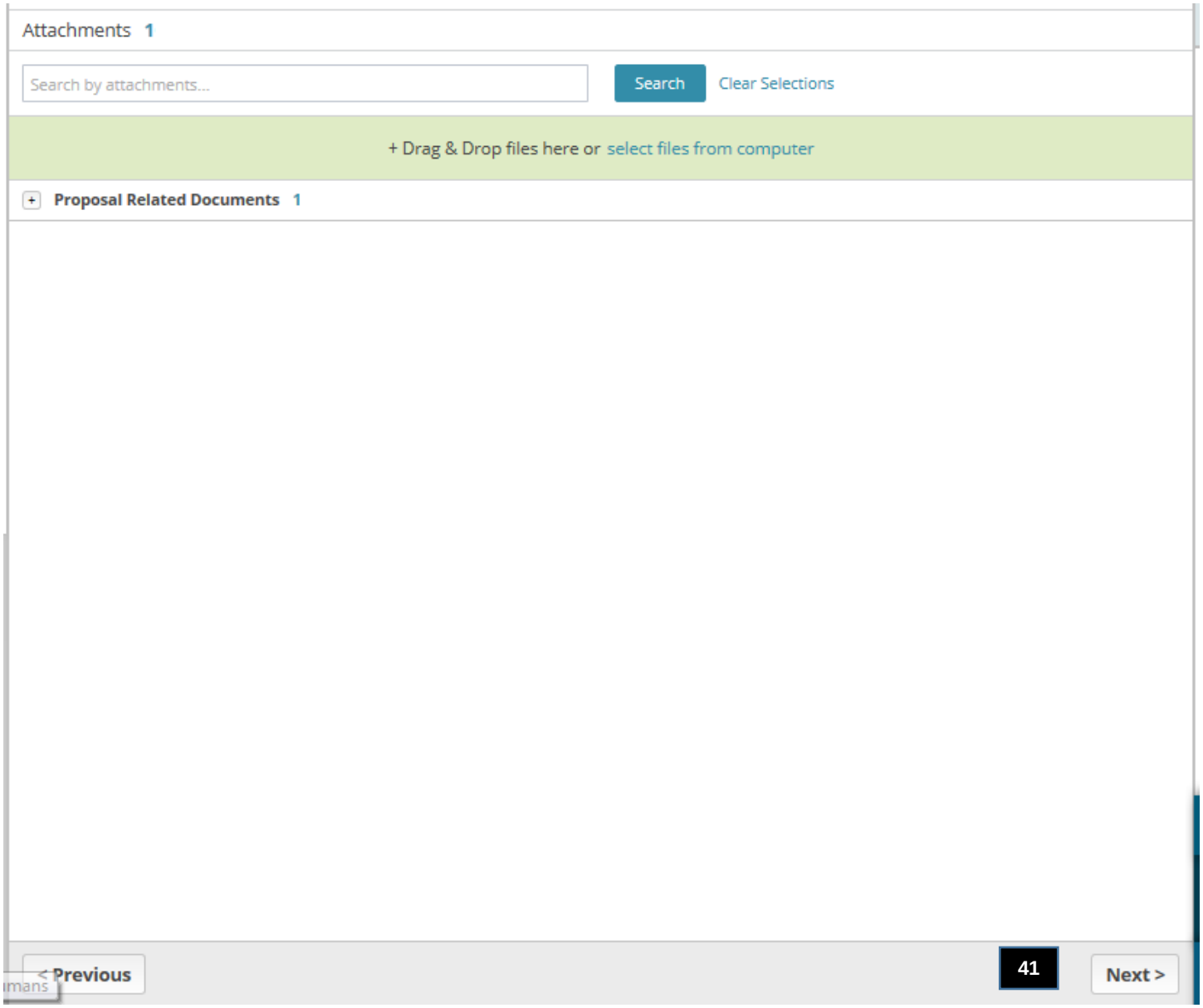
36. Select the **Type** and **Role** for each staff member on the project
37. Click "**Add New Staff**" as needed to enter additional staff names, types and their roles
38. Click **Next**



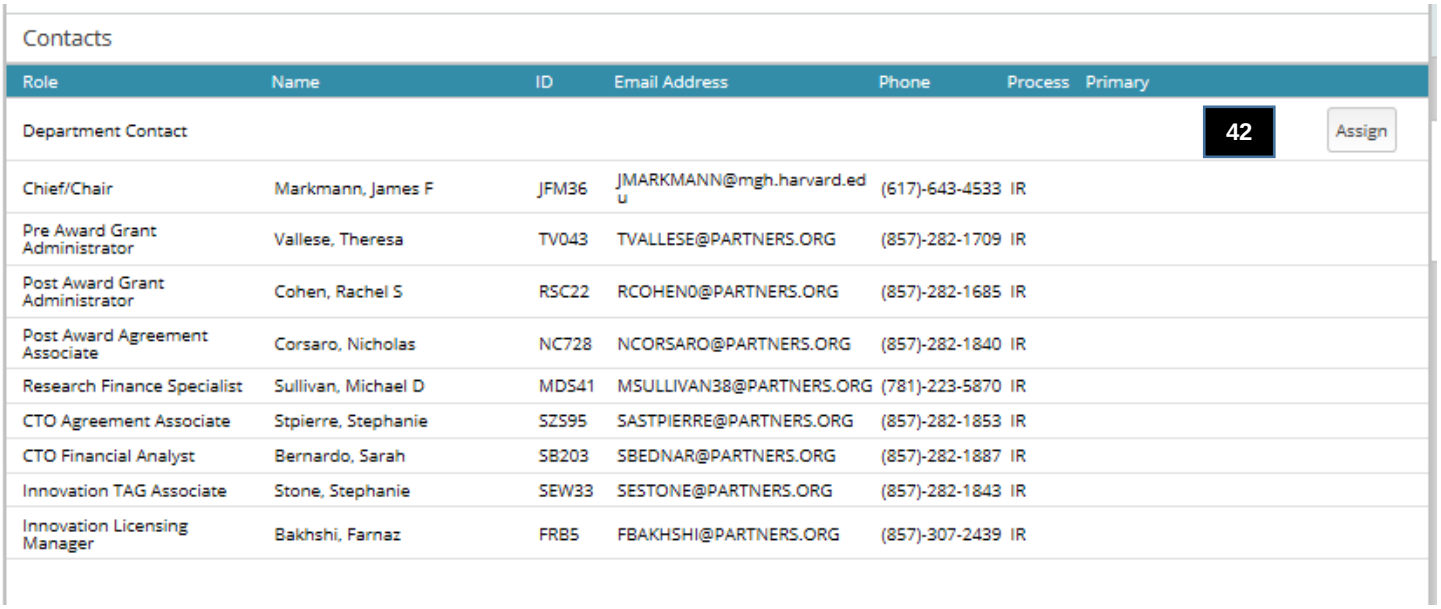
39. Enter the effort for the Principal Investigator. Enter the effort for all other personnel listed.
40. Click **Next**.

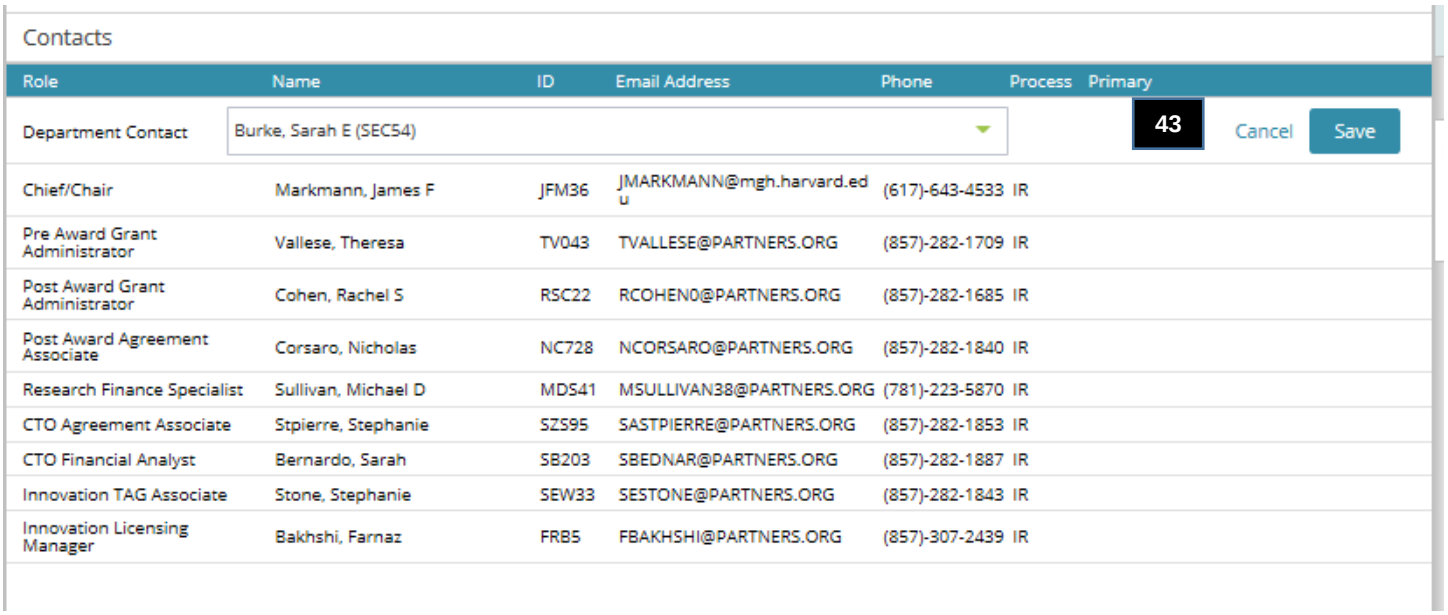


41. Click Next. Do not upload additional documents. ECOR will upload the remaining required documents, e.g. award letter, proposal, etc.)

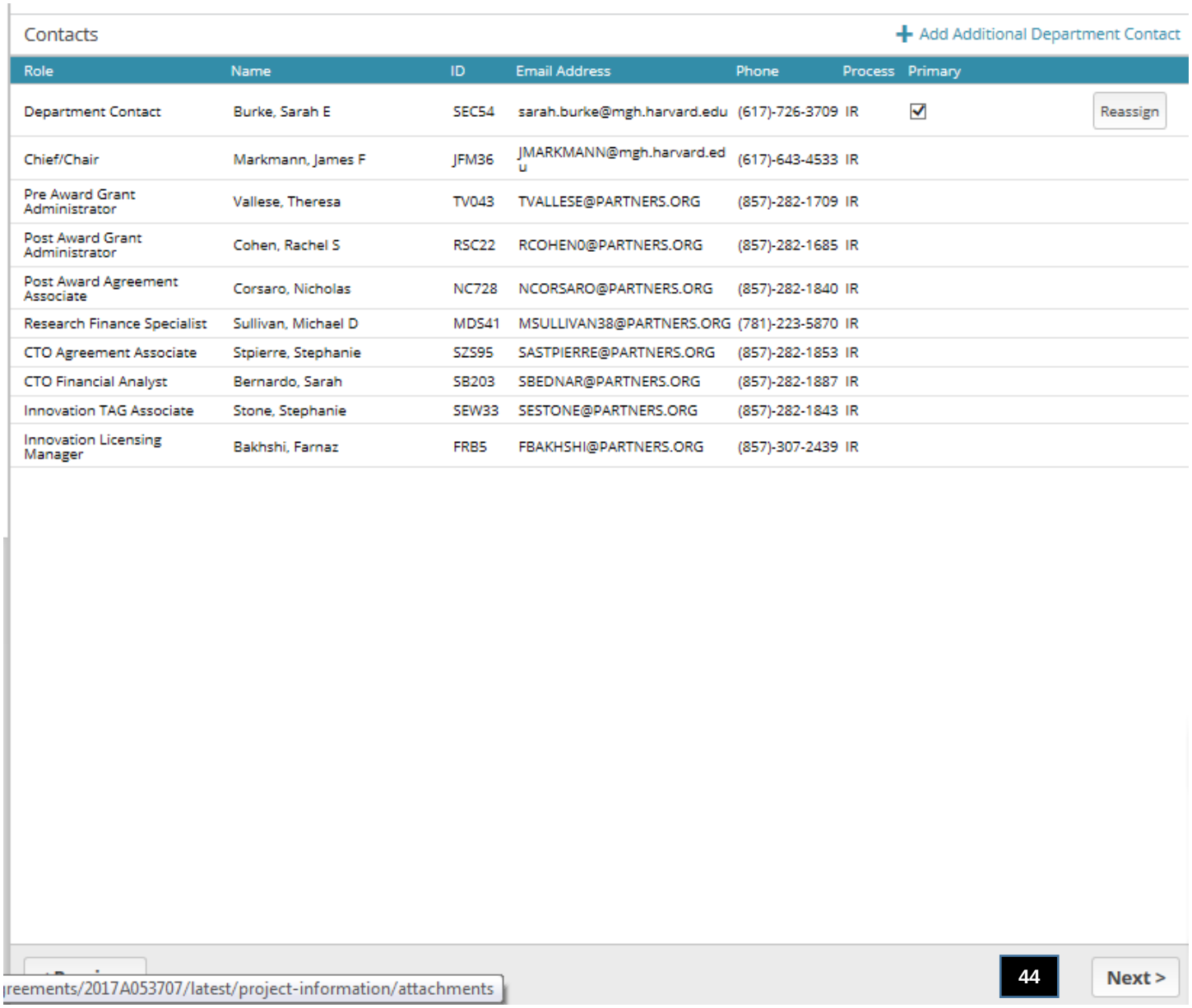


42. Click **Assign** and select the appropriate department administrator name from the dropdown list.
43. Click **Save.**

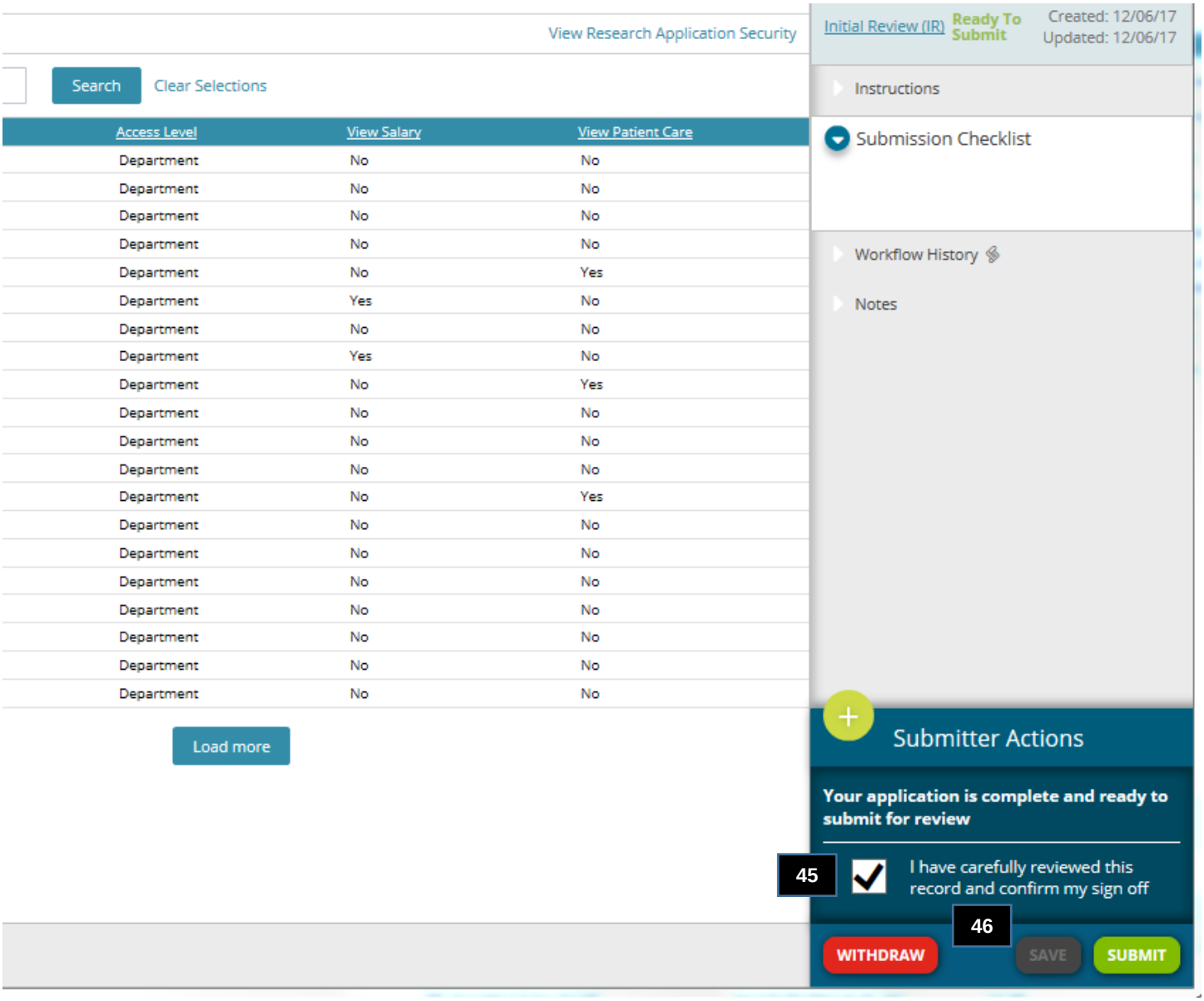




44. Click Next.



45. Check the box confirming that you have carefully reviewed the record and to confirm your sign off.
46. Click **Submit**. (Click **Save** if you would like to save the record and submit it another time)
47. Once Submitted the record will route to the DA Approver. Once the DA approves, the record will route To the PI for approval then the Chief for approval.



Please call or email ECOR if you have questions regarding the set-up of ECOR awards using Insight 4.0.

Email: ecor@mgh.harvard.edu

Phone: 617-643-7420

If you have general questions regarding Insight 4.0, please contact the Insight helpdesk.

Email: insightHelpDesk@partners.org

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