Creating and Routing a New Clinical Trial Project

To create a new clinical trial project in InfoEd, click My Proposals in the left sidebar and click 

![Create New Proposal]

**Step 0: Confirm the Intended Principal Investigator (PI)***

By default, the PI is set to the user who is logged into the InfoEd system. To modify the PI, click 

[Change PI]. Select the first letter of the last name you would like to find in the personnel search. Click the down arrow and scroll through the pick list to highlight the desired name, or type the name into the textbox to search for a particular entry. Locate the desired name and click [Select]. The new PI will appear at the top of the screen and in the header.

**Step 1: Create a "New" Proposal or "Copy From Existing"?***

Users have the option to create a new proposal or copy from an existing proposal record that was previously created in InfoEd. However, most users will likely need to select the "Create a New Proposal" option since new users will not have previously completed records from which to copy. As users create records in InfoEd, those records can then be a source from which to copy. Once a selection is made, click 

[Continue to Next Step].
**Step 1 Continued: Select the Funding Opportunity.**

Users can select a funding opportunity from one of the two built in funding opportunity databases: Grants.gov or SPIN (InfoEd’s funding opportunity database). But, for a non NIH-sponsored clinical trial, users must select the option, “Setup Proposal Manually.”

Once the selection is made, click [Continue to Next Step].

**Step 2: Select a Proposal Type**

While users can select from several different proposal types, the selection for a clinical trial project will always be “New/Original.”

Once the selection is made, click [Continue to Next Step].

**Step 3: Select a Sponsor**

To select a sponsor, click the letter that corresponds to the first letter in the sponsor’s name. Next, locate the sponsor in the drop-down list and when found, click to select. Once the selection is made, click [Continue to Next Step].

Alternatively, users search for a particular sponsor. To search for a sponsor, click the letter that corresponds to the first letter in the sponsor’s name. Next, use the “Search for a particular entry” box and begin typing the sponsor’s name. Matches will appear. Once the correct sponsor is reflected in the sponsor name field, click [Continue to Next Step].
Step 3: Select a Sponsor

Step 4: Proposal Numbering
The proposal “Tracking” Number or “Proposal” Number will be automatically assigned and Step 4 skipped. The proposal number is the InfoEd record number utilized for record tracking and record location purposes. The step will display onscreen with the following notation: “This proposal will be automatically numbered.” There is nothing for the user themselves to do in Step 4.

Step 5: Project Title
In the text field provided, enter the project’s title and click "Continue to Next Step".

Step 6: Project Start and End Dates
Enter the anticipated start and end dates of the project and then click "Continue to Next Step". Start and end dates may be entered manually by typing in the month, day and year (070114) or by selecting from the calendar. Note that while a start and end date is required, it is understood that these are estimated dates only and that the start and end dates and length of a clinical trial is dependent upon several factors and may ultimately differ to what is entered here.

Step 7: Number of Budget Periods
Based upon the start and end dates and the length of the project entered in Step 6, InfoEd will suggest a corresponding number of budget periods to be created for the project budget. Due to the nature of clinical trial funding, however, those entering clinical trial information into InfoEd will not be presented with the InfoEd budget screens. The number of budget periods is, therefore, irrelevant. Accept the number of budget periods suggested by InfoEd and click "Continue to Next Step".

InfoEd will then present the question, “Is all of the above information is correct?” If yes, click "Yes, Create Proposal". If no, select "No, Go back and make changes" and correct any previously entered information.
**Step 8: Setup Questions**

When a user reaches the Setup Questions screen, the InfoEd clinical trial record has been created, and one should see the following displayed on the screen:

"This page is unique for non NIH-Sponsored clinical trials. If your project is not a clinical trial or if your project is an NIH-sponsored clinical trial, promptly contact Erika Waday in the Office of Sponsored Projects to have the InfoEd screen template reset."

The InfoEd screens shown to the user for completion have been customized for clinical trials. The InfoEd clinical trial screen template is invoked when a known clinical trial sponsor is chosen; however, it is difficult to know every clinical trial sponsor, so there may be times when the InfoEd administrator, Erika Waday, will need to manually set the clinical trial screen template. It is very important for users to contact Erika Waday if they are entering a clinical trial and do not see the above language displayed on the Setup Questions screen.

To complete the Setup Questions screen, answer all setup questions and click Save and Continue.

**Completing Clinical Trial Tabs**

When entering a clinical trial record into InfoEd, sections of the record will be designated as tabs in the left sidebar. Aside from the Setup Questions tab, three tabs remain for clinical trials: Personnel, Internal eForms and Docs and Finalize.

**Personnel Tab**

The Personnel tab is where all project personnel will be listed. By default, the only person to initially appear on this screen is the PI. To add other personnel, click Personnel Wizard, and answer the questions presented. InfoEd will assign personnel to the correct personnel category (UNR employee, TBD person or subcontractor) based upon how the questions are answered. Repeat the process until all personnel have been added. Note: when adding the “practice plan” as a subcontractor, please select the official name, University of Nevada School of Medicine Multispecialty Group Practice South, Inc., from the subcontractor database. While not mandatory, one can upload Current and Pending Support and/or CV documents for each person by clicking the corresponding boxes. The ability to upload the documents will then appear. When done entering personnel, check the Completed box in the upper right area of the screen: ☑.

**Internal eForms and Docs Tab**

The Internal eForms and Docs Tab is where one will complete the OSP-1 Transmittal eForm and upload the following clinical trial documentation: protocol, informed consent form, budget, feasibility checklist and clinical study/trial agreement. To complete the OSP-1 Transmittal eForm, follow the on-screen instructions. To upload clinical trial documentation, follow the on-screen instructions. When the OSP-1 Transmittal eForm has been completed and the clinical trial documentation uploaded, check the Completed box in the upper right corner of the screen: ☑.
**Finalize Tab**
The Finalize tab is where one will route the clinical trial for internal approvals by the PI, other key personnel, chairs and deans. Be sure to follow any on-screen instructions—they will guide you.

Once all InfoEd tabs for a clinical trial have been completed, the **Submit Final Review** option will be available. It is via the Submit Final Review function that a proposal will be electronically routed for internal approvals. To begin the final review route, click the icon.

For further information on electronic routing, please see the document, “Electronically Routing a Proposal.”

**Important Information**
- InfoEd Production Site URL: [https://unrprod.infoedglobal.com](https://unrprod.infoedglobal.com) (This is the live site for preparing proposals). This URL is also posted on the OSP website.
- InfoEd Test Site URL: [https://unrtest.infoedglobal.com](https://unrtest.infoedglobal.com) (This is the test site where users can experiment and get acquainted with the software without a live submission result.)
- Technical Support: Please contact Erika Waday (ewaday@unr.edu or 775-784-4049).
- For further information about InfoEd, please visit the OSP website [InfoEd page](#).