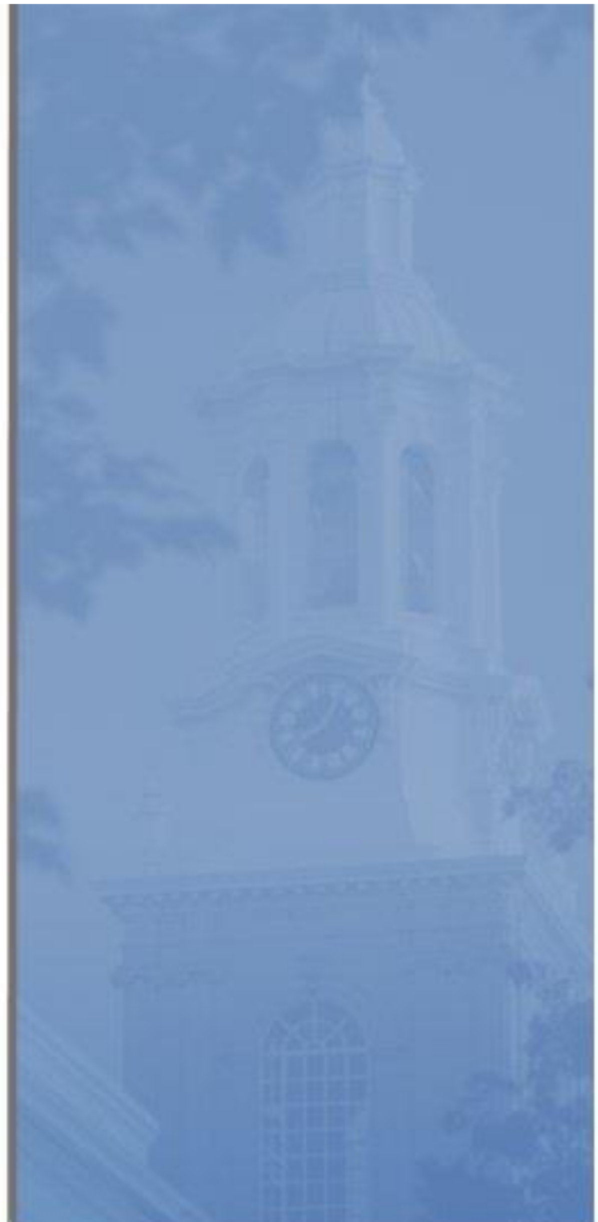
Click Portal

Grants Module

Review and Approval

For Co-Investigators, Chairs and Deans



University at Buffalo
The State University of New York

Version 3 – 7/23/2018

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What is the Click Portal?

The SUNY Pre-Award and Compliance System (PACS) is a multi-year collaboration created to support investigators and students along with compliance and research administrative staff by giving them a new administrative tool - the Click Portal.

Click will automate the submission, review, and approval processes while managing all major administrative aspects of the research and compliance lifecycle – from proposal development and submission through compliance checks, negotiations, award setup and award management, to eventual project closeout.

This system integrates the following aspects of grants management into a single system:

- IRB
- IACUC
- Grants Management
- Conflicts of Interest (COI)
- Research Agreements
- Safety

Under the stewardship of UB's Office of the Vice President for Research and Economic Development, this platform will allow the University at Buffalo to achieve a new level of uniformity and efficiency, while also producing valuable data analytics that can guide future decisions.

UB is helping lead this system-wide effort and was the first SUNY campus to deploy the IRB module in Fall 2015.

Getting a Click Account

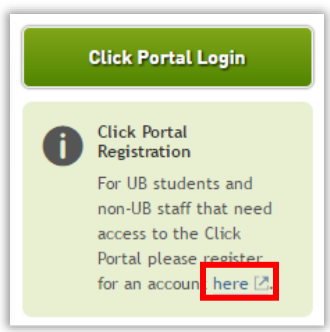
Accounts have been created for faculty and staff at the University at Buffalo in preparation for campus-wide implementation of the Click Portal. Faculty and staff users will log into the system using their **UBIT Name** and **Password**.

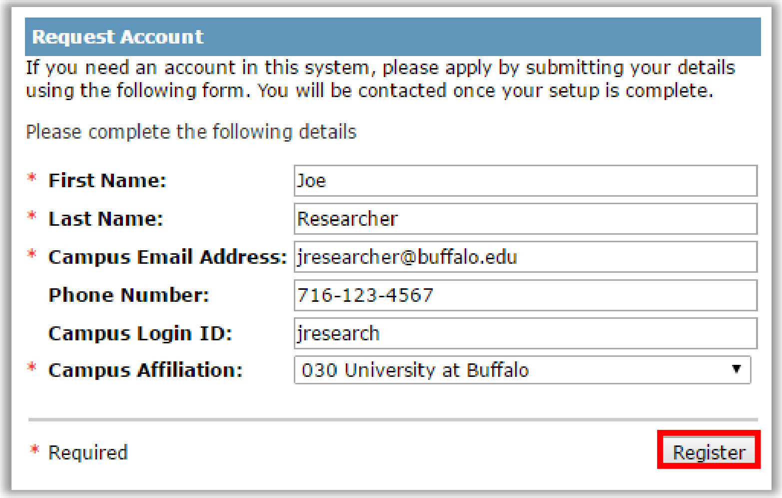
If your login attempt is unsuccessful, or you are a student participating on a research team, please follow the instructions below to request an account:

Navigate to the **Click Portal: IRB and Managing Compliance** page at http://www.buffalo.edu/research/research-services/compliance/irb/click-irb.html

Locate the **Click Portal Login** area at the top-right of the page, and click on the registration link.

Complete the **Request Account** form at the bottom of the page, and then click the **Register** button. Be sure to select the *University at Buffalo* as your **Campus Affiliation**.

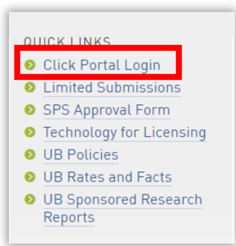




You will receive an email notification when your account has been activated.

Logging into the Click Portal

Navigate to the [UB Research and Economic Development](http://www.buffalo.edu/research) page at http://www.buffalo.edu/research
Locate the **Quick Links** section in the center of the page.
Click on the **Click Portal Login** link.



Enter your **UBIT Name** and **Password** in the fields, and then click the **Log In** button.

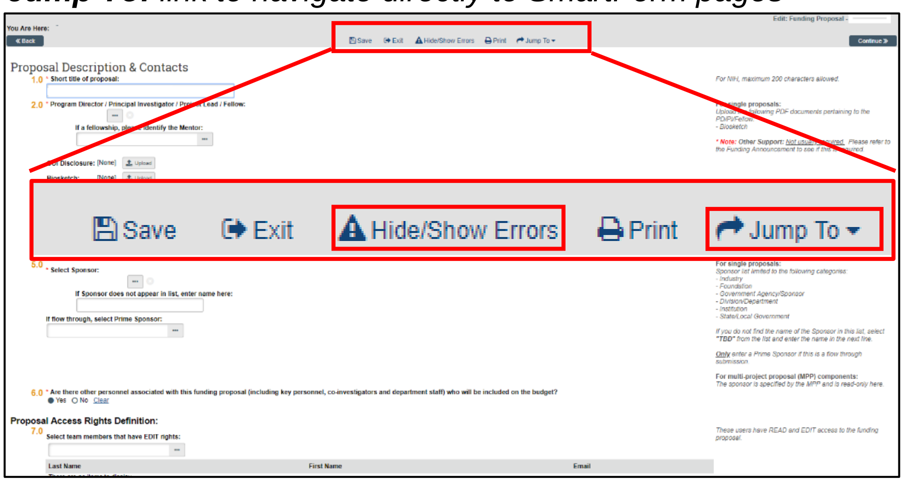
Workflow

The below workflow appears on all stages of the Funding Proposal. The highlighted blue bubble changes as each stage of the Funding Proposal is completed.

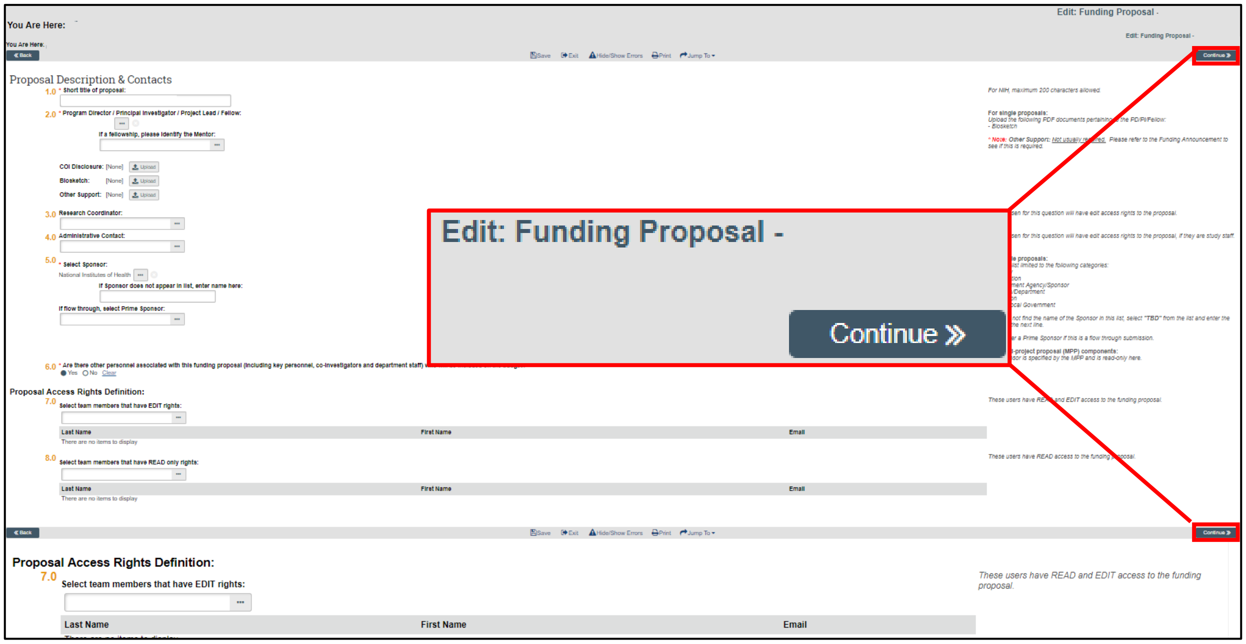
Additional Tips

Click the **Hide/Show Errors** link in the navigation bar at the top or bottom of the **SmartForm** page to display any unanswered questions.

*Use the **Jump To:** link to navigate directly to SmartForm pages*



Enter the required information into each **SmartForm**. Required fields are marked with an asterisk (*). Select the **Continue** button at either the top-right or bottom-right of each form once completed. Data is auto saved via the **Continue** button.



Click the Help icon ( ) for more information about a question or field

Email Specialist

Select **Email Specialist** from the menu **My Current Actions** located on the right side of the screen. This allows you to email the SPS representative for the selected proposal

Email Proposal Team

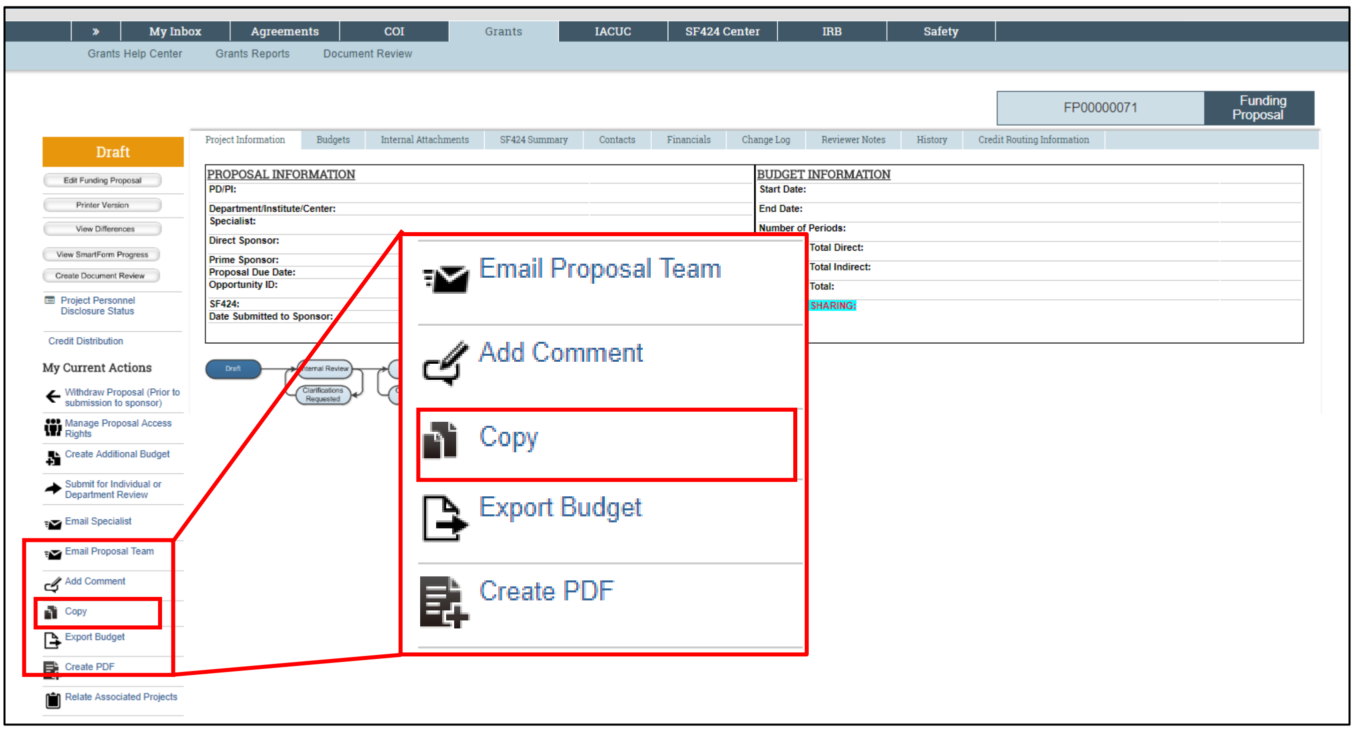
Select **Email Proposal Team** from the menu **My Current Actions** located on the right side of the screen. This allows you to email everyone at once listed on the selected proposal.

Add Comment

Select **Add Comment** from the menu **My Current Actions** located on the right side of the screen. This allows you to add a comment to the proposal which shows up in **History.**

Copy Proposal

Select **Copy** from the menu **My Current Actions** located on the right side of the screen. This allows you to make an exact copy of an existing proposal.



History

To see **History** of changes made to the Funding Proposal select **History** from the menu on the top of the page. You may need to scroll to the left of the screen to see the **History** option.

Credit Routing Information

Once the proposal has been submitted for review you can track the progress from **Credit Routing Information** option located on the top left of the proposal page. You may need to scroll to the left to see the **Credit Routing Information** option.

How to use these instructions:

Each section below has a screenshot of the SmartForm. The screenshot highlights the required fields that need to be filled out in order to continue to the next page which is also indicated by a red asterisk (*). You may need to fill out more than the required information in order to submit your proposal.

Routing

Submission

Email Prompt

Once the Principal Investigator has submitted Funding Proposal you will receive an email that the Funding Proposal is ready for review. Select the link from the email and review the Funding Proposal.

Action Required

Funding Proposal Link: FP00000054
Funding Proposal Principal Investigator:
Funding Proposal Title:
Specialist:
Sponsor:

You are listed as a Co-Pi / key personnel on the above listed proposal. Your review and approval of this proposal is REQUIRED for the proposal's submission to proceed.

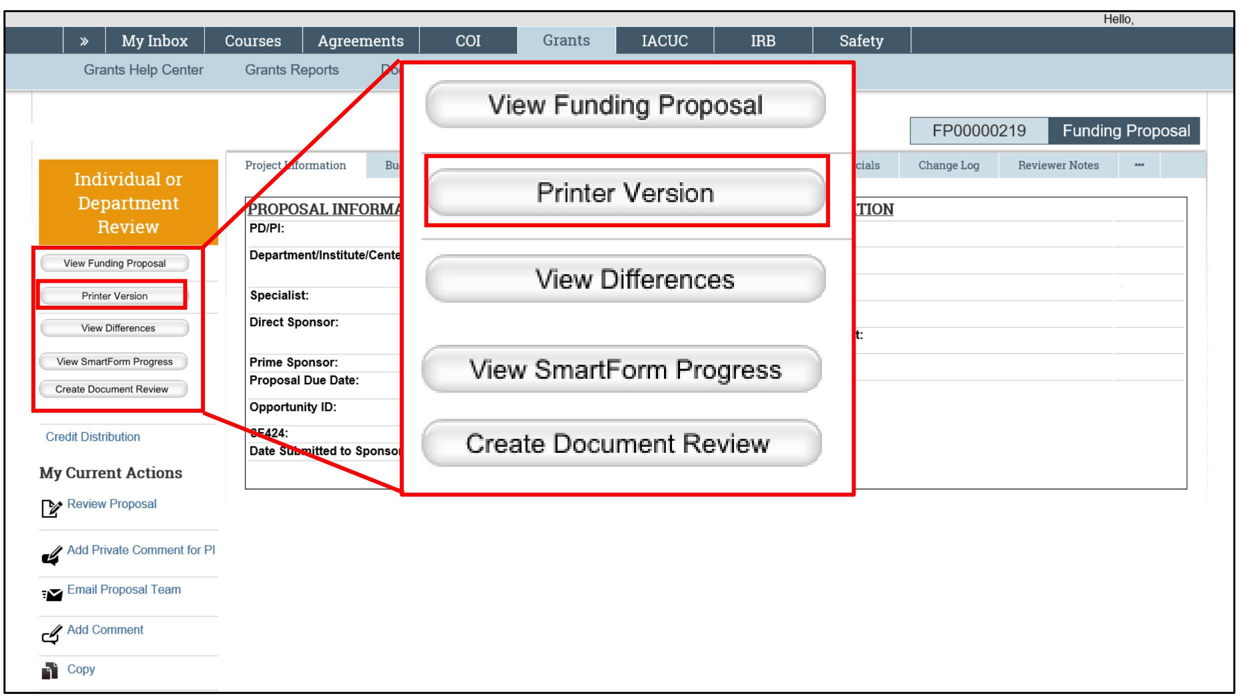
Click on the **FP# hyperlink** above to go to the funding proposal workspace, review the funding proposal, and take appropriate action.

If you have any question regarding this proposal please contact the proposal's Specialist.

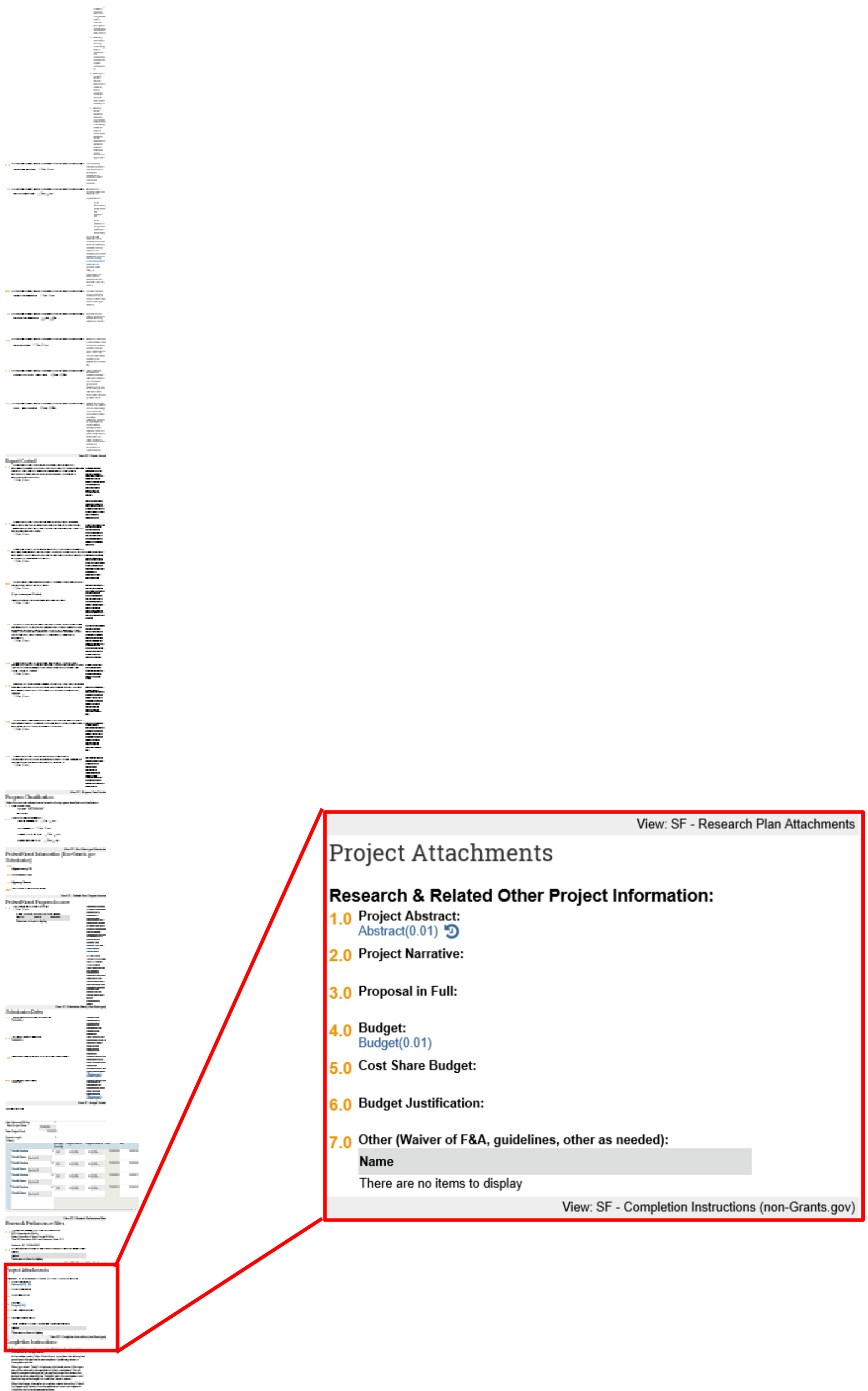
Confidentiality Notice
The information contained in and/or attached to this email message may be confidential. If you are not the intended or authorized recipient, you are hereby notified that any unauthorized distribution, dissemination, or copying of this transmission is prohibited. If you have received this transmission in error, please contact the sender immediately and destroy all copies.

Review Funding Proposal Information

1. Click on printer version



Scroll through printer version view to review Funding Proposal information. The last section of printer view is **Project Attachments**, each attachment which will need to be opened separately.



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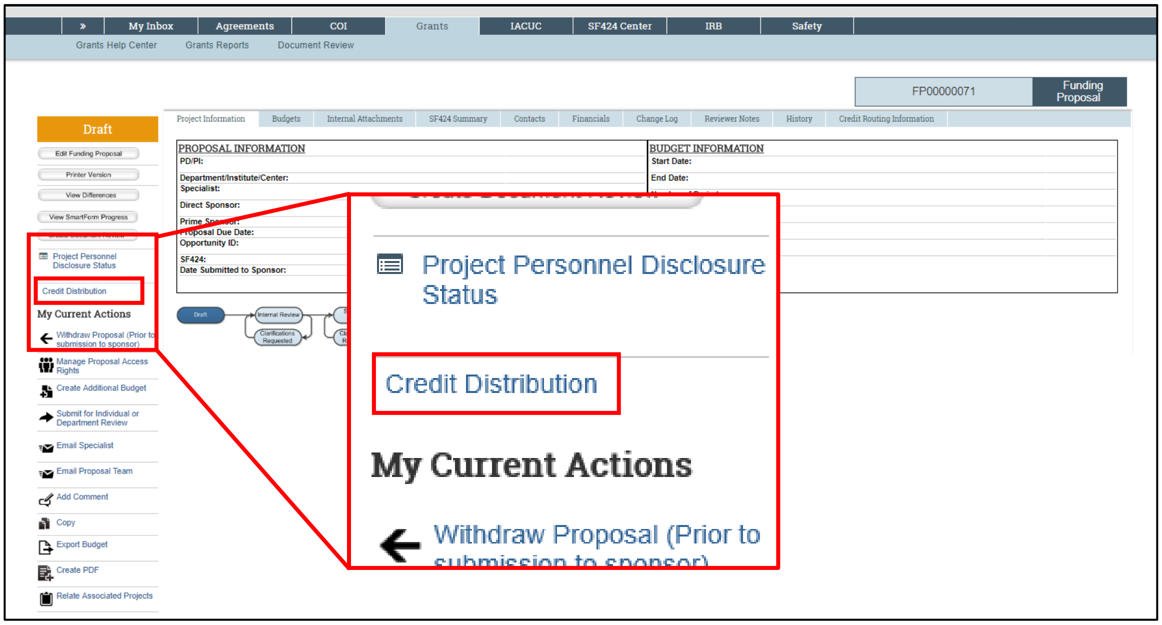
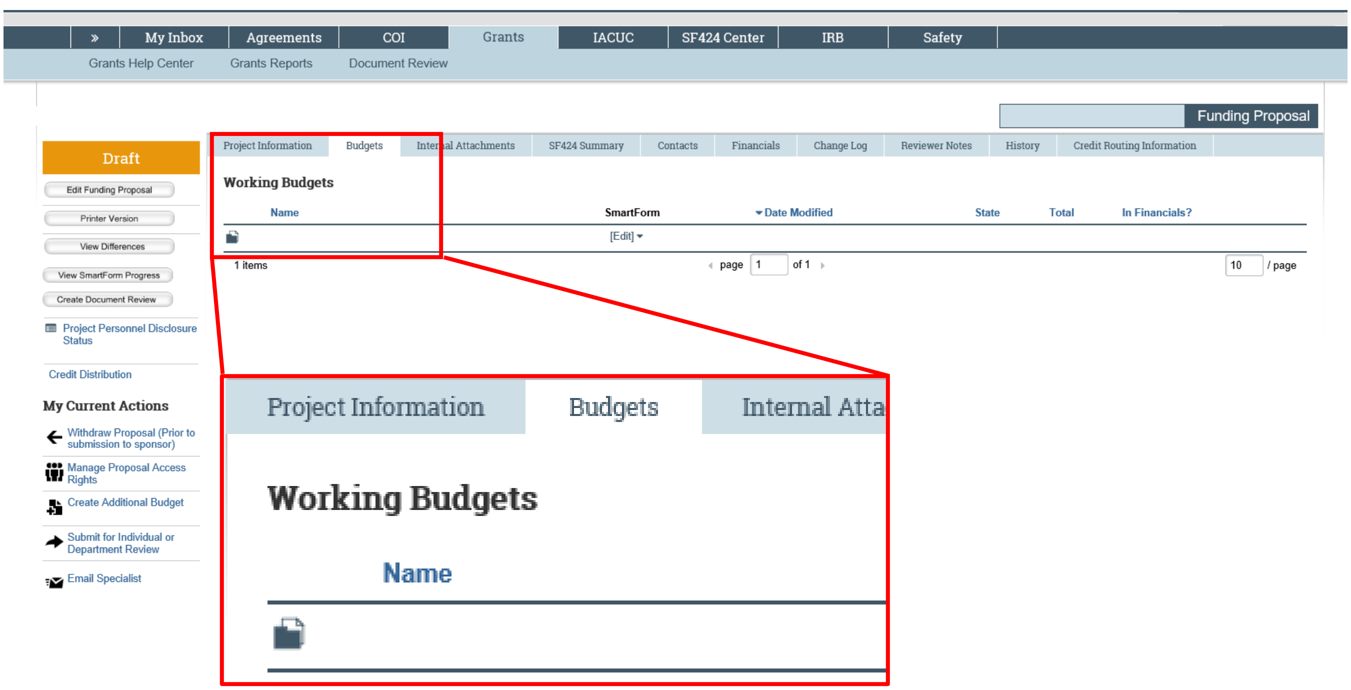
Review Credit Distribution

1. Click on **Credit Distribution** located on the left side menu

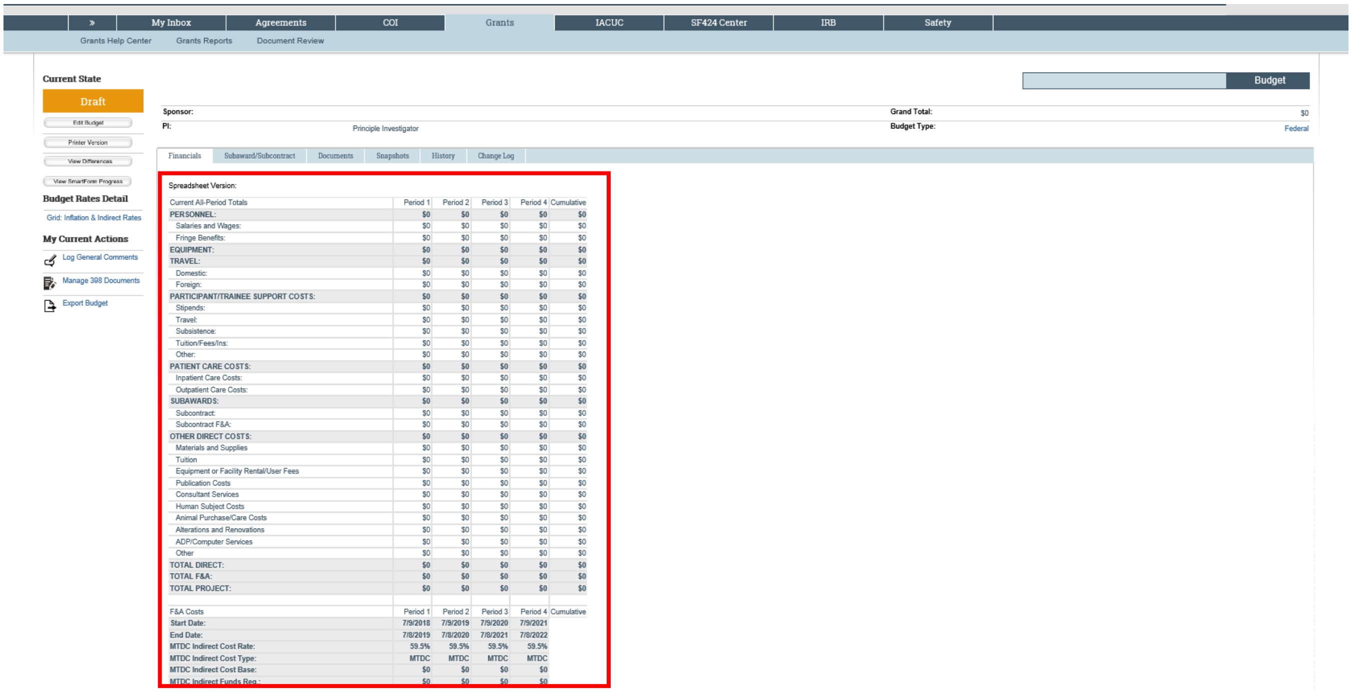


Review Budget Information

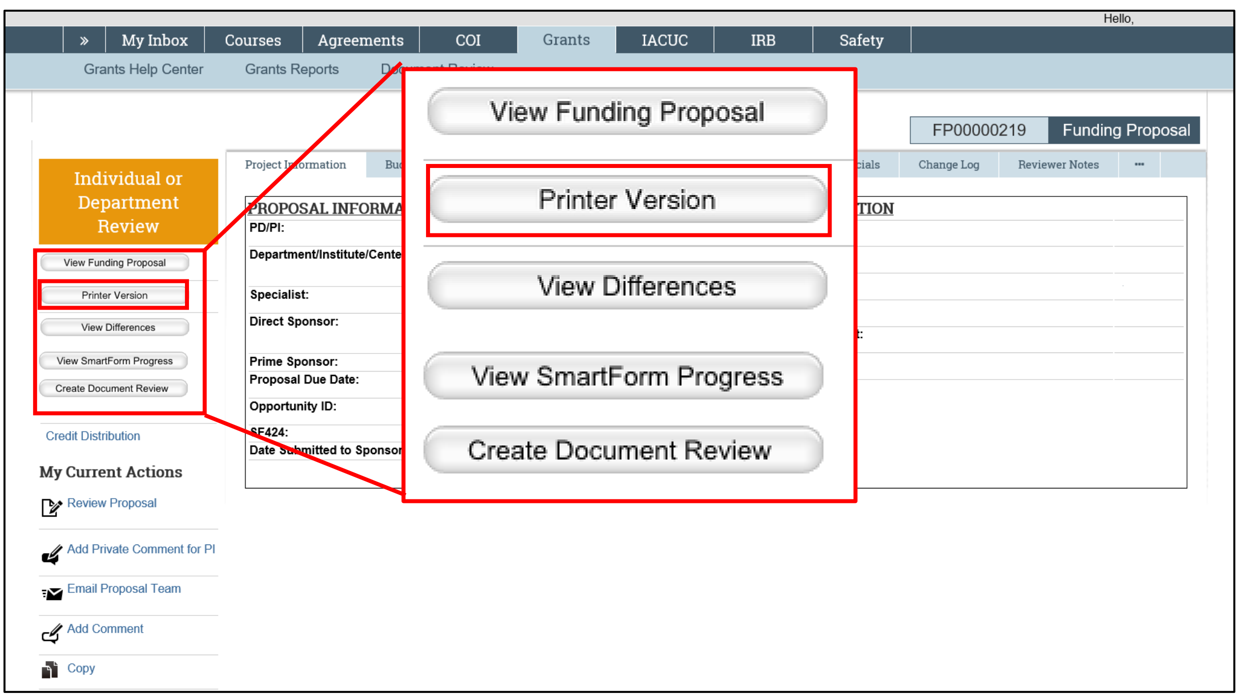
1. Select **Budgets** tab, click on budget name located under **Working Budgets**



2. Review high level budget information

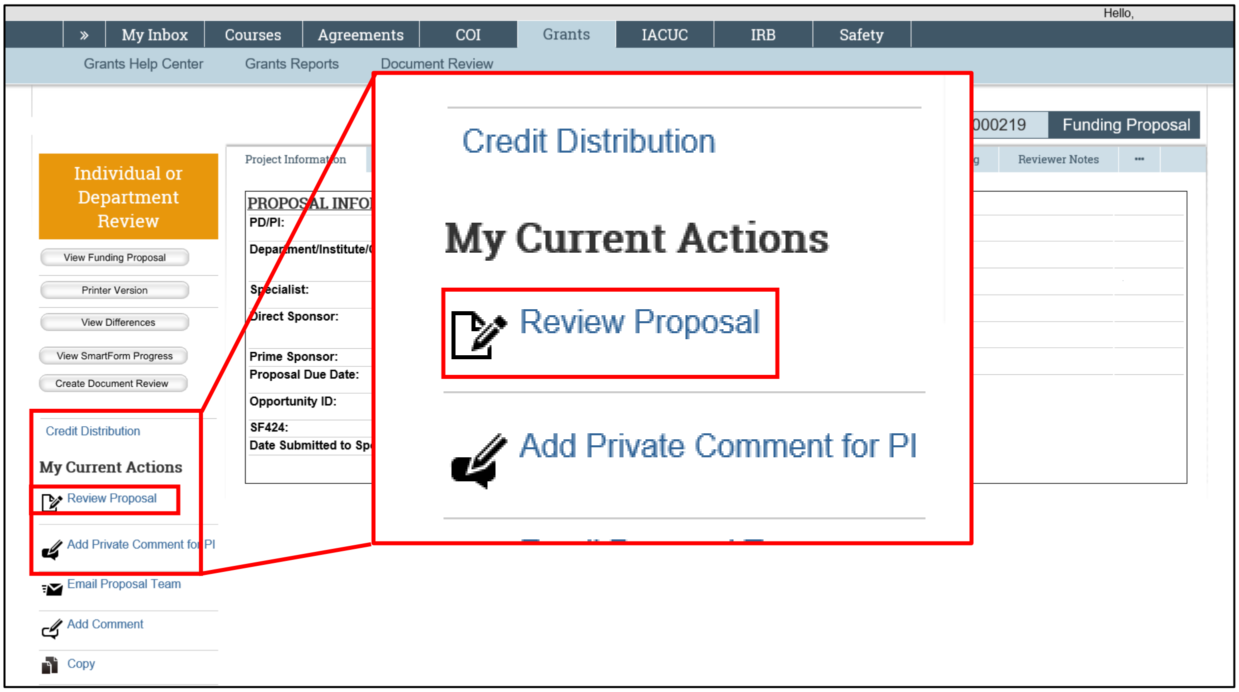


3. Click on printer version for budget details



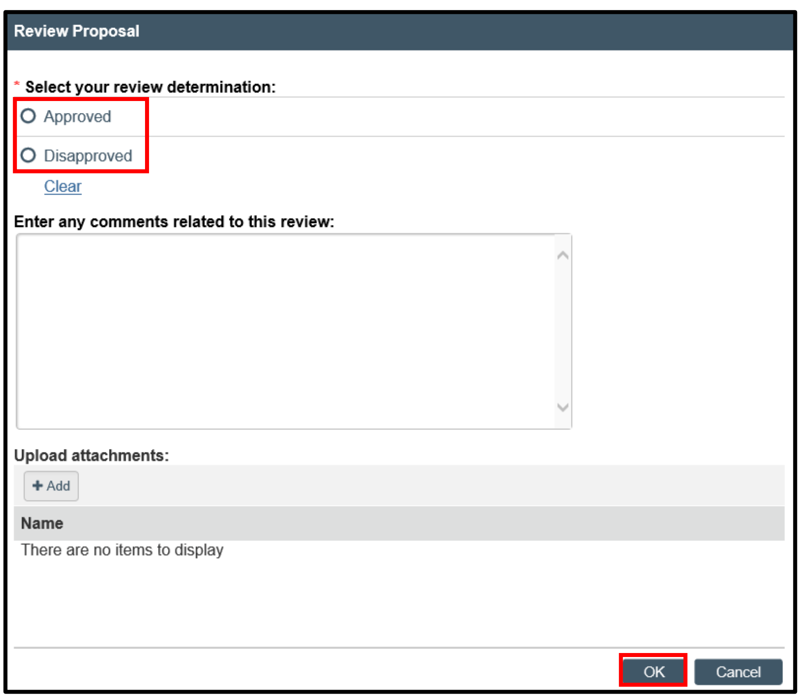
Approve or Disapprove

Once ready to Approve Select **Review Proposal** located on the left hand side under **My Current Actions**



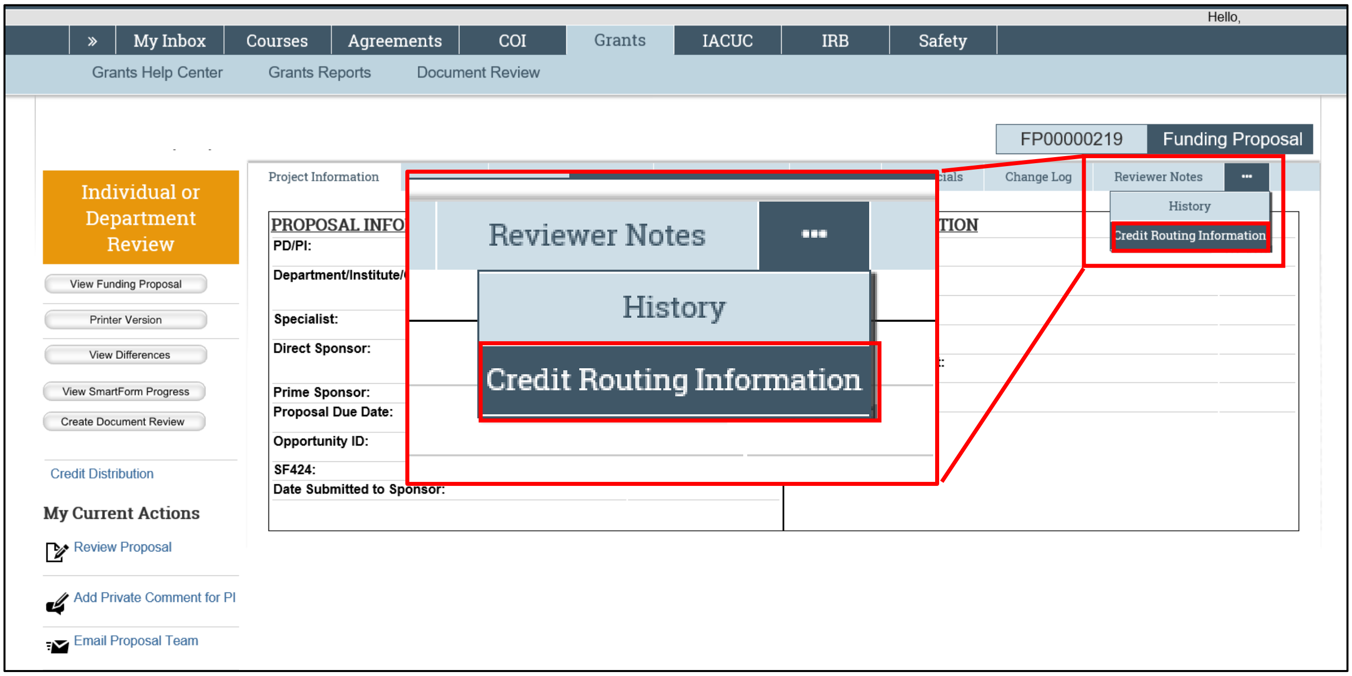
Select either Approved or Disapproved, enter any comments and **OK**

- If **Approved**, Funding Proposal moves onto the next Reviewer.
- If **Disapproved**, Funding Proposal moves back to the PI level. Ensure comments are clear for PI action.

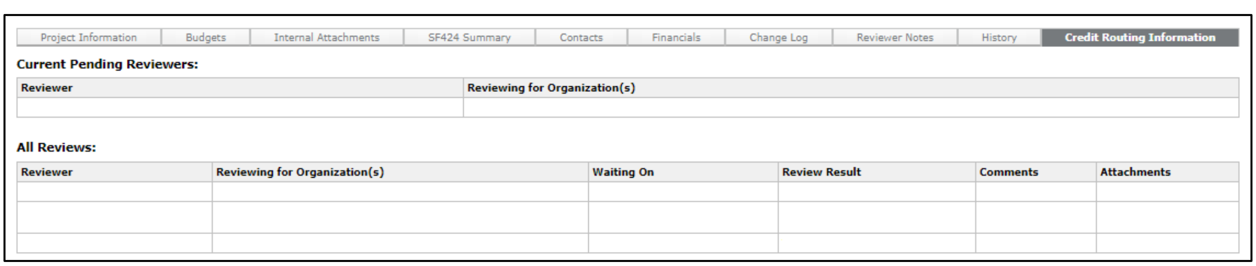


Status of the Funding Proposal

1. Go to the front page of your **Funding Proposal**
2. Select **Credit Routing Information** located on the right side of the screen, if you cannot see this menu option scroll to the right.



3. The page will list **Current Pending Reviewers** these are the people that are currently approving the Funding Proposal. At the bottom of the page is **All Reviewers** these are all the people who have previously approved, are pending approval or who have yet to receive the Funding Proposal to approve.
   a. The column **Reviewer** lists all the people involved in reviewing this Funding Proposal
   b. The column **Reviewing for Organization (s)** lists the department or school the Reviewer is reviewing for
   c. The column **Waiting On** lists the person(s) that need to approve the Funding Proposal before it routes to that Reviewer
   d. The column **Reviewer Result** will tell you the review status of that person (example: waiting for approval, approved, to be submitted, etc).
   e. The column **Comments** shows any comments written by the Reviewer when they approved the Funding Proposal
   f. The column **Attachments** shows any attachments uploaded by the Reviewer when they approved the Funding Proposal

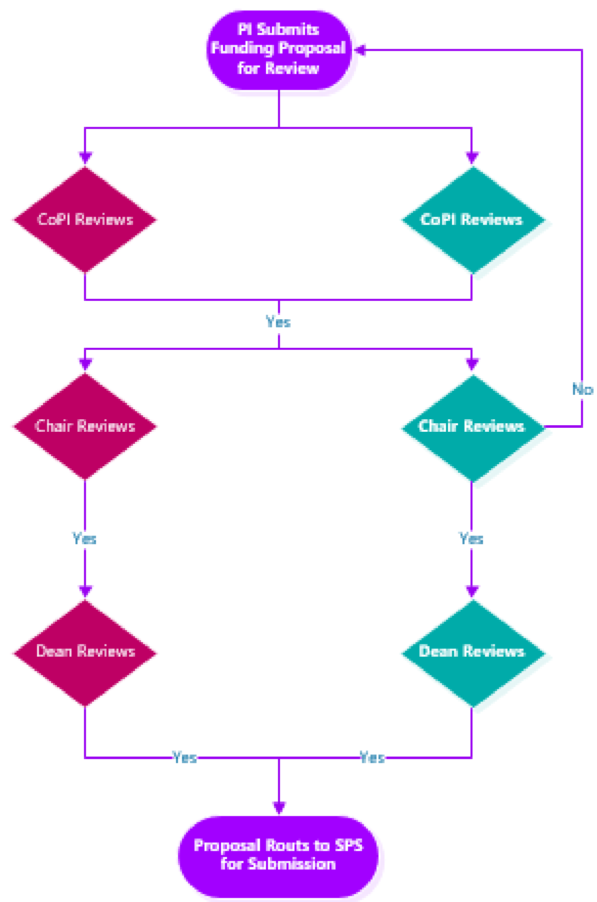


How A Funding Proposal Routes

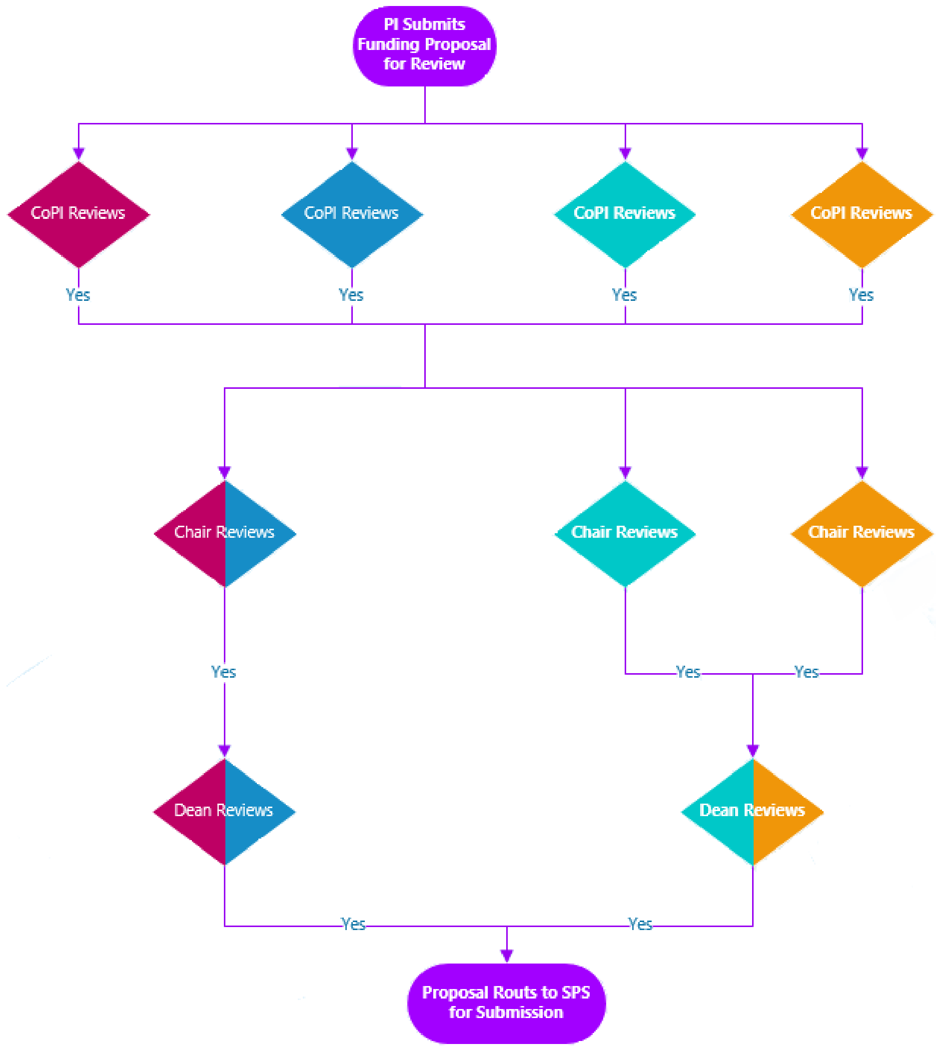
- A Funding Proposal must be approved by all Co-Investigators before it routes to the Chair/Dean Levels
- Once the Funding Proposal is approved at the Co-Investigator level the Funding Proposal moves to the Chair level.
  - If the Chairs are in the same school both Chairs need to approve before going to the Dean level.
  - If the Chairs are in different schools only the Chair of that school needs to approve before moving onto the Dean level.
- Once the Funding Proposal is at the Dean level all Deans must approve before the Funding Proposal is routed to SPS for Specialist Review.
- At any stage if the Reviewer disapproves the Funding Proposal the Funding Proposal will be routed back to the PI level for requested edits. The Funding Proposal then must go through all Reviewer levels again.
- For any unit listed in the Credit Distribution all Reviewers, including the main Reviewer and any alternates, will get an email prompting them to review the Funding Proposal.
  - For each unit only one person will need to approve.
- If the PI or Co-Investigator is a Chair or Dean they will need to approve at both levels and will get an email requesting for them to approve at that level.

The following are two workflow examples of how a Funding Proposal might route through the system.

- The Funding Proposal is submitted by the PI and is moved to the Co-Investigator level.
- Both Co-Investigators must approve before the Funding Proposal is moved to the Chair level.
- At the Chair level the routing splits. As one Chair approves the Funding Proposal will route to the Dean without needing the other Chair to approve.
- Once at the Dean level both Deans need to approve before the Funding Proposal is routed to SPS for Specialist Review.



- The Funding Proposal is submitted by the PI and is moved to the Co-Investigator level
- All Co-Investigators must approve before the Funding Proposal is routed to the Chair level
- At the Chair level the routing splits:
    - The left two Co-Investigators are in the same department, only one Chair needs to approve. Once approved the Dean receives an email to review.
    - The right two Co-Investigators are in different departments but the same school. After both Chairs approve the Dean receives an email to review.
- Once both Deans have approved the Funding Proposal is routed to SPS for Specialist Review



Once all chairs and deans approve, the Funding Proposal advances to the Specialist Review state for SPS final review and sponsor submission.