

Click Portal

Grants Module
Review and Approval
For Co-Investigators, Chairs
and Deans

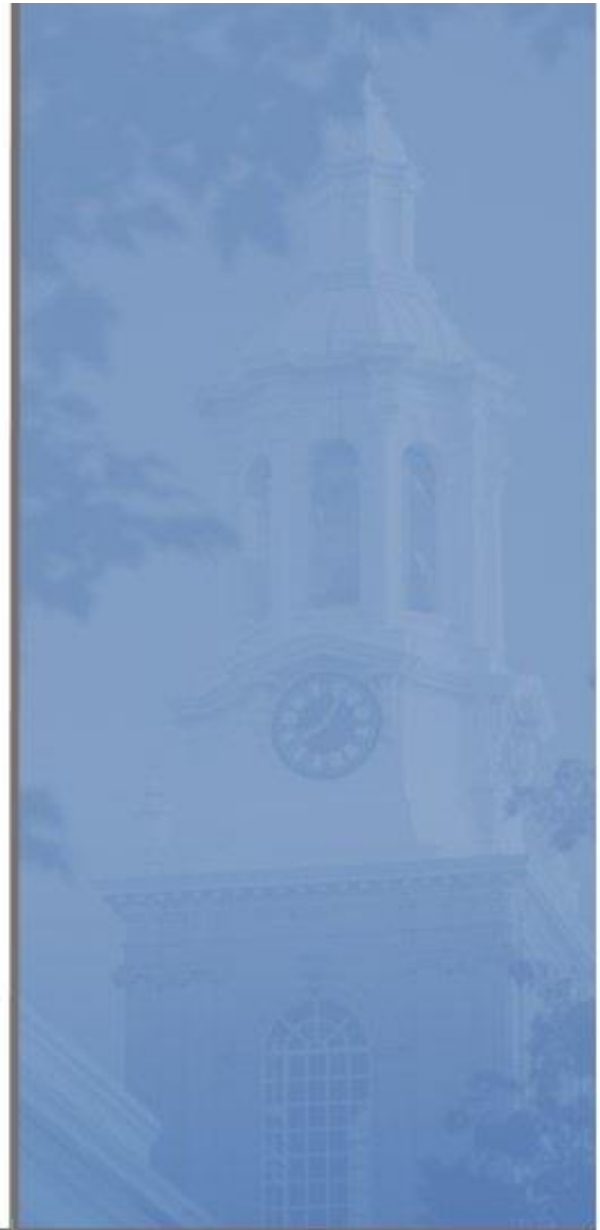




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What is the Click Portal?

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

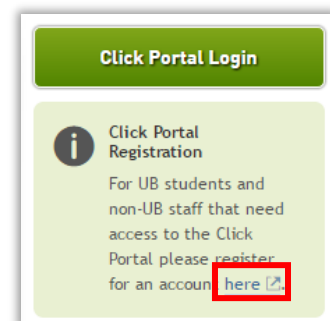
Accounts have been created for faculty and staff at the University at Buffalo in preparation for campus-wide implementation of the Click Portal. Faculty and staff users will log into the system using their **UBIT Name** and **Password**.

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](http://www.buffalo.edu/research/research-services/compliance/irb/click-irb.html) 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**.





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Request Account

If you need an account in this system, please apply by submitting your details using the following form. You will be contacted once your setup is complete.

Please complete the following details

* First Name:	Joe
* Last Name:	Researcher
* Campus Email Address:	jresearcher@buffalo.edu
Phone Number:	716-123-4567
Campus Login ID:	jresearch
* Campus Affiliation:	030 University at Buffalo

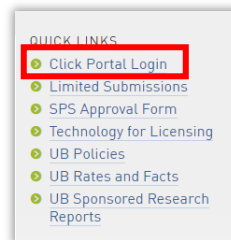
* Required **Register**

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.

Login Required

<input type="text" value="jresearch"/>
<input type="password" value="....."/>
Log In



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





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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.

The screenshot displays the Grants Module interface for a funding proposal (FP00000071). The top navigation bar includes tabs for My Inbox, Agreements, COI, Grants, IACUC, SF424 Center, IRB, and Safety. Below this, there are sub-tabs for Grants Help Center, Grants Reports, and Document Review. The main content area is divided into several sections: Draft, Project Information, Budgets, Internal Attachments, SF424 Summary, Contacts, Financials, Change Log, Reviewer Notes, History, and Credit Routing Information. The 'My Current Actions' menu is highlighted with a red box, showing options like Withdraw Proposal, Manage Proposal Access, Create Additional Budget, Submit for Individual or Department Review, Email Specialist, Email Proposal Team, Add Comment, Copy, Export Budget, Create PDF, and Relate Associated Projects. A red box also highlights the 'Copy' option in the 'My Current Actions' menu. A larger red box highlights the 'Email Proposal Team', 'Add Comment', 'Copy', 'Export Budget', and 'Create PDF' options in the 'My Current Actions' menu. The 'PROPOSAL INFORMATION' section includes fields for PD/PI, Department/Institute/Center, Specialist, Direct Sponsor, Prime Sponsor, Proposal Due Date, Opportunity ID, SF424, and Date Submitted to Sponsor. The 'BUDGET INFORMATION' section includes fields for Start Date, End Date, Number of Periods, Total Direct, Total Indirect, and Total. A 'SHARING' link is also visible.

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

The screenshot shows the Grants Module interface. The top navigation bar includes: My Inbox, Courses, Agreements, COI, Grants, IACUC, IRB, Safety, and Hello. Below the navigation bar, there are tabs for Grants Help Center, Grants Reports, and a dropdown menu. The main content area displays a funding proposal for ID FP00000219. A sidebar on the left contains a section titled 'Individual or Department Review' with buttons for 'View Funding Proposal', 'Printer Version', 'View Differences', 'View SmartForm Progress', and 'Create Document Review'. The 'Printer Version' button is highlighted with a red box. The main content area also features a large set of buttons: 'View Funding Proposal', 'Printer Version', 'View Differences', 'View SmartForm Progress', and 'Create Document Review'. The 'Printer Version' button is highlighted with a red box. The right sidebar shows a 'Change Log' and 'Reviewer Notes' section.



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.



View: SF - Research Plan Attachments

Project Attachments

Research & Related Other Project Information:

- 1.0 Project Abstract:
[Abstract\(0.01\)](#)
- 2.0 Project Narrative:
- 3.0 Proposal in Full:
- 4.0 Budget:
[Budget\(0.01\)](#)
- 5.0 Cost Share Budget:
- 6.0 Budget Justification:
- 7.0 Other (Waiver of F&A, guidelines, other as needed):
Name
There are no items to display

View: SF - Completion Instructions (non-Grants.gov)



Review Credit Distribution

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

The screenshot shows the Grants Module interface. The left sidebar contains a 'Draft' section with various actions. The 'Credit Distribution' menu item is highlighted with a red box. The main content area displays the 'Project Personnel Disclosure Status' page, which includes a 'Credit Distribution' link also highlighted with a red box. Below this link is the 'My Current Actions' section, which includes a 'Withdraw Proposal (Prior to submission to sponsor)' link.

Review Budget Information

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

The screenshot shows the Grants Module interface with the 'Budgets' tab selected. The 'Working Budgets' section is visible, showing a table with columns for Name, SmartForm, Date Modified, State, Total, and In Financials?. The table contains one item. The 'Budgets' tab is highlighted with a red box, and the 'Working Budgets' section is also highlighted with a red box.



2. Review high level budget information

The screenshot shows a web-based budget review interface. At the top, there are navigation tabs: My Inbox, Agreements, COI, Grants, IACUC, SF424 Center, IRB, and Safety. Below these are sub-tabs: Grants Help Center, Grants Reports, and Document Review. The main content area is titled 'Current State' and shows a 'Draft' status. A 'Budget' button is visible in the top right. The central part of the screen displays a 'Spreadsheet Version' of the budget, which is highlighted with a red box. This spreadsheet lists various budget categories such as PERSONNEL, EQUIPMENT, TRAVEL, and SUBAWARDS, with columns for Period 1, Period 2, Period 3, Period 4, and Cumulative. The total budget is shown as \$0.

Category	Period 1	Period 2	Period 3	Period 4	Cumulative
Current All-Period Totals	\$0	\$0	\$0	\$0	\$0
PERSONNEL:					
Salaries and Wages	\$0	\$0	\$0	\$0	\$0
Fringe Benefits	\$0	\$0	\$0	\$0	\$0
EQUIPMENT:					
Domestic	\$0	\$0	\$0	\$0	\$0
Foreign	\$0	\$0	\$0	\$0	\$0
PARTICIPANT/TRAINEE SUPPORT COSTS:					
Stipends	\$0	\$0	\$0	\$0	\$0
Travel	\$0	\$0	\$0	\$0	\$0
Subsistence	\$0	\$0	\$0	\$0	\$0
Tuition/Fees/Inst	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0
PATIENT CARE COSTS:					
Equipment Care Costs	\$0	\$0	\$0	\$0	\$0
Outpatient Care Costs	\$0	\$0	\$0	\$0	\$0
SUBAWARDS:					
Subcontract	\$0	\$0	\$0	\$0	\$0
Subcontract F&A	\$0	\$0	\$0	\$0	\$0
OTHER DIRECT COSTS:					
Materials and Supplies	\$0	\$0	\$0	\$0	\$0
Tuition	\$0	\$0	\$0	\$0	\$0
Equipment or Facility Rental/User Fees	\$0	\$0	\$0	\$0	\$0
Publication Costs	\$0	\$0	\$0	\$0	\$0
Consultant Services	\$0	\$0	\$0	\$0	\$0
Human Subject Costs	\$0	\$0	\$0	\$0	\$0
Animal Purchase/Care Costs	\$0	\$0	\$0	\$0	\$0
Alterations and Renovations	\$0	\$0	\$0	\$0	\$0
ADP/Computer Services	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0
TOTAL DIRECT:	\$0	\$0	\$0	\$0	\$0
TOTAL F&A:	\$0	\$0	\$0	\$0	\$0
TOTAL PROJECT:	\$0	\$0	\$0	\$0	\$0

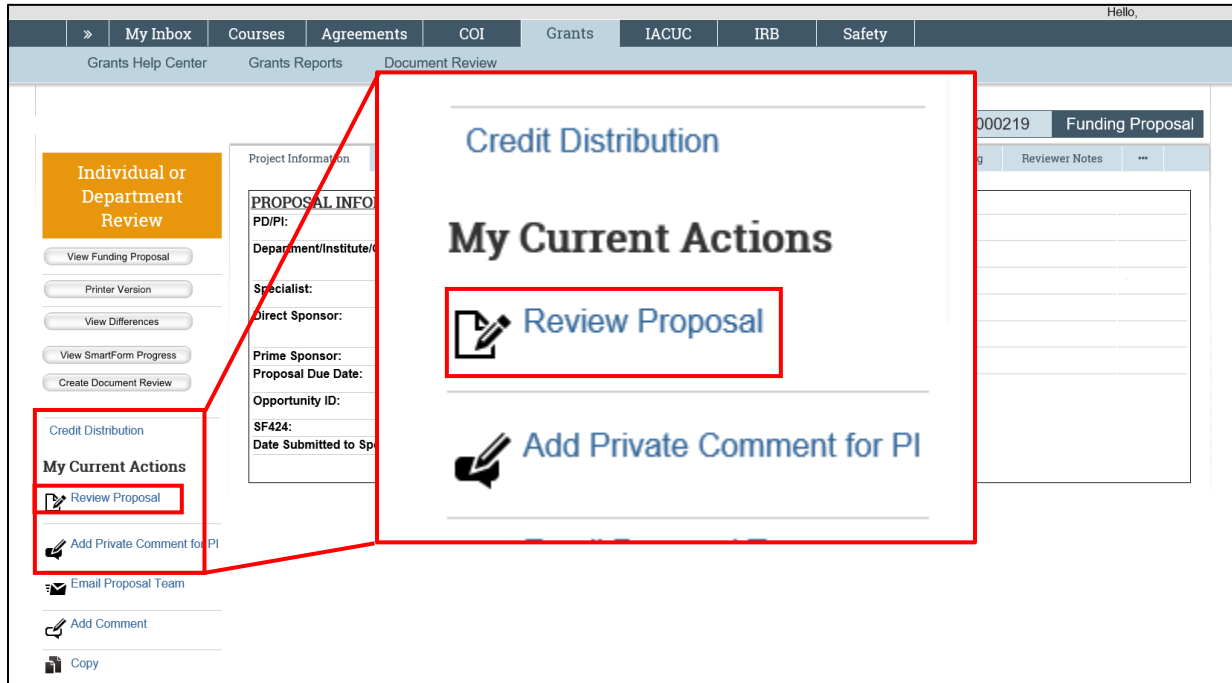
3. Click on printer version for budget details

The screenshot shows a web-based funding proposal review interface. At the top, there are navigation tabs: My Inbox, Courses, Agreements, COI, Grants, IACUC, IRB, and Safety. Below these are sub-tabs: Grants Help Center, Grants Reports, and Document Review. The main content area is titled 'Individual or Department Review' and shows a 'Draft' status. A 'Funding Proposal' button is visible in the top right. The central part of the screen displays a 'PROPOSAL INFORMATION' section with fields for PD/PI, Department/Institute/Center, Specialist, Direct Sponsor, Prime Sponsor, Proposal Due Date, Opportunity ID, SF424, and Date Submitted to Sponsor. A red box highlights the 'Printer Version' button, which is located in the middle of the page. Other buttons visible include 'View Funding Proposal', 'View Differences', 'View SmartForm Progress', and 'Create Document Review'.



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.

Review Proposal

* Select your review determination:

Approved

Disapproved

[Clear](#)

Enter any comments related to this review:

Upload attachments:

[+ Add](#)

Name

There are no items to display

[OK](#) [Cancel](#)



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.

The screenshot shows the Grants Module interface for a Funding Proposal (FP00000219). The top navigation bar includes 'My Inbox', 'Courses', 'Agreements', 'COI', 'Grants', 'IACUC', 'IRB', and 'Safety'. The main content area displays 'Project Information' with fields for 'PROPOSAL INFO', 'PD/PI', 'Department/Institute', 'Specialist', 'Direct Sponsor', 'Prime Sponsor', 'Proposal Due Date', 'Opportunity ID', 'SF424', and 'Date Submitted to Sponsor'. A red box highlights the 'Reviewer Notes' and 'History' tabs, with a callout box showing the 'Credit Routing Information' option selected.

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

Project Information	Budgets	Internal Attachments	SF424 Summary	Contacts	Financials	Change Log	Reviewer Notes	History	Credit Routing Information
Current Pending Reviewers:									
Reviewer		Reviewing for Organization(s)							
All Reviews:									
Reviewer	Reviewing for Organization(s)	Waiting On	Review Result	Comments	Attachments				

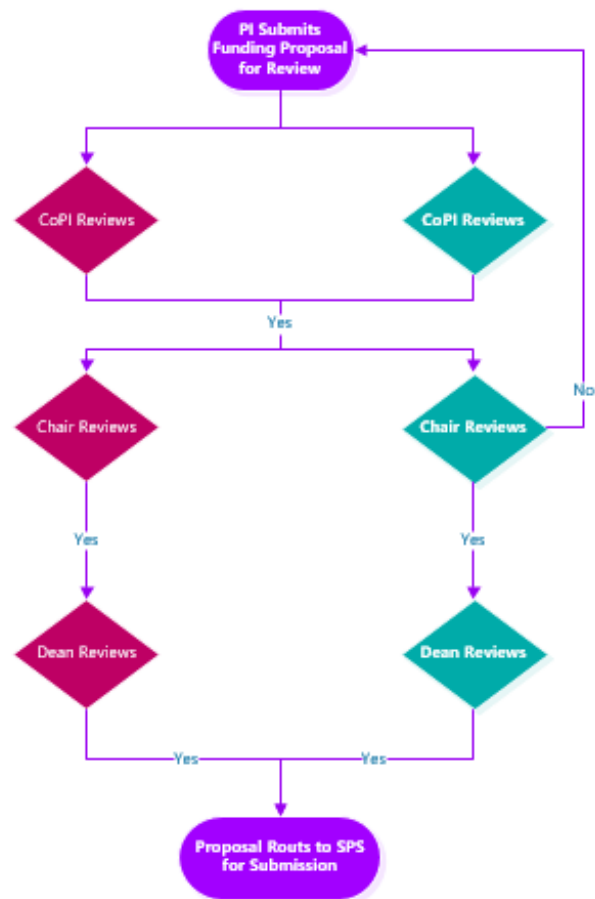


How A Funding Proposal Routes

- 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.

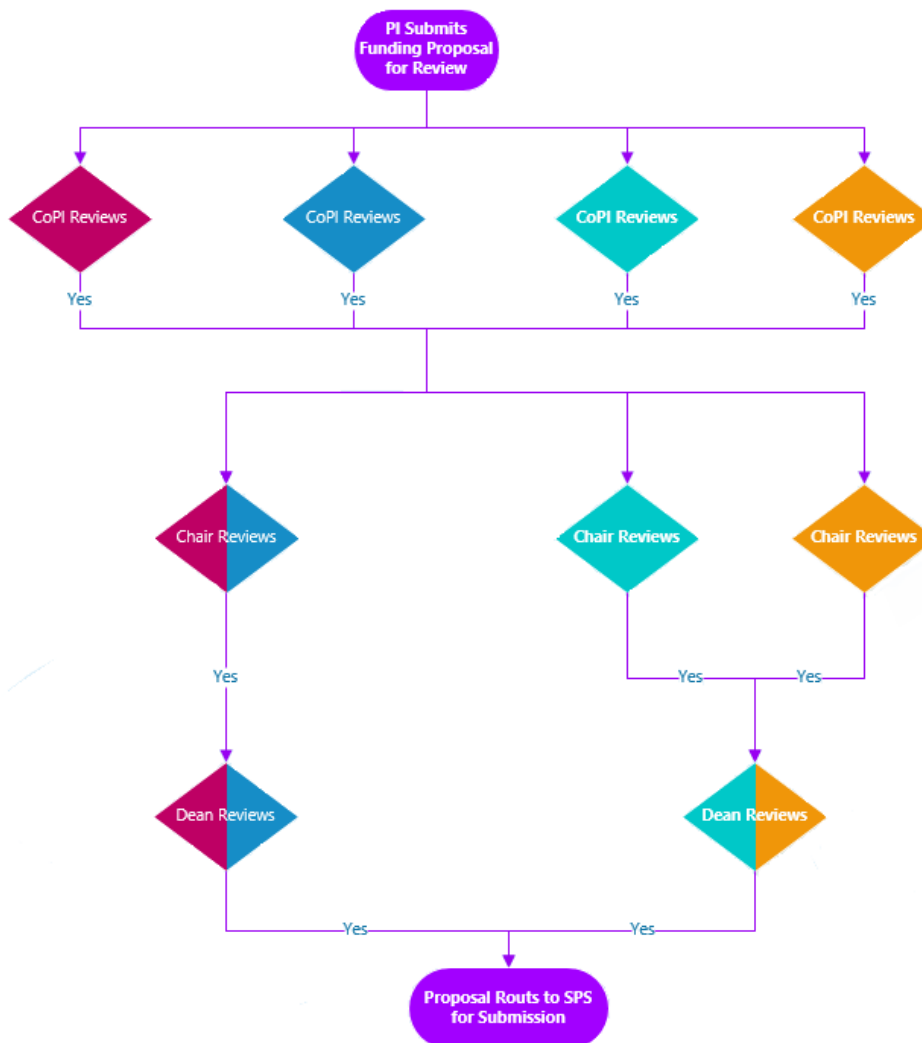
- The Funding Proposal is submitted by the PI and is moved to the Co-Investigator level.
- Both Co-Investigators must approve before the Funding Proposal is moved to the Chair level.
- At the Chair level the routing splits. As one Chair approves the Funding Proposal will route to the Dean without needing 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.





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- 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.

