

Add SPO Funding

Important: The Principal Investigator (PI) of the grant or subcontract must log into the system to add his or her grant(s) and/or contract(s) to the protocol. It is not possible to delegate this task. The PI of the grant must also be listed on the protocol in one of the following roles: Principal Investigator or Faculty Sponsor, Student or Postdoctoral Investigator, Co-Principal Investigator, Administrative Contact, or Other Contact. However, training grants can be added by anybody listed on the protocol in one of the aforementioned roles and this person need not be the PI of the grant.

- 1) Log in to eProtocol with your CalNet ID & password at: <https://eprotocol.berkeley.edu>
- 2) Click on the **IRB** tab to see your Investigator Homepage for IRB Submissions.



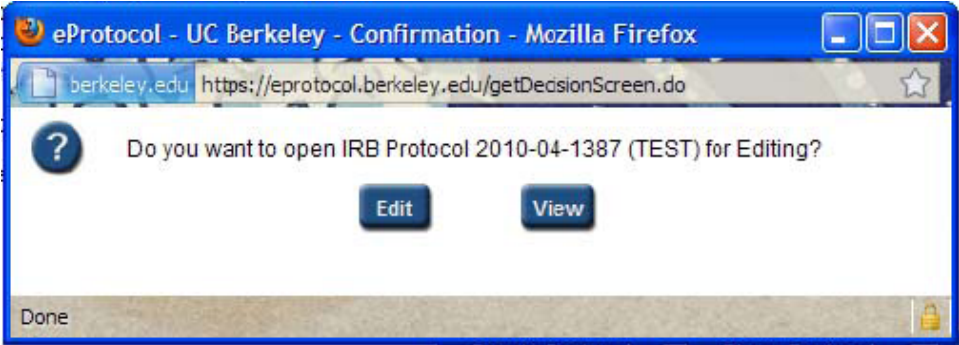
- 3) If a New or Amendment Application under your name already exists, it will be visible on your Investigator Homepage. If it does not, you should first review [Create a New Protocol](#) or [Amend/Modify an Approved Protocol](#). To open the protocol, click on the **Protocol ID** link or the **Yet to Submit** link.



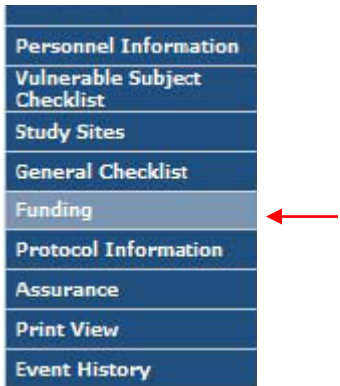
Protocol ID	Principal Investigator	Title	Protocol Event	Panel	Meeting Date
2010-04-1387	EMP-FACULTY TEST	Biomedical Exempt	Yet to Submit to IRB		
2010-04-1385	EMP-FACULTY TEST	Soc-Behav-Ed Non-Exempt Form	Yet to Submit to IRB		

- 4) A pop-up window will appear asking if you want to open the protocol for editing. Click on **Edit**.

Note: If there is no edit option, someone else has the protocol open and you must ask them to close the protocol before you will be able to proceed. Only one person can edit a protocol at one time.



5) The protocol application will open on the Personnel Information section. Click on **Funding** in the blue side panel menu to skip to that section.



6) In the Funding section, click on the **Add** button by the SPO – Funding tab.

Funding Checklist

If the research is not funded, check the "Not Funded" box below. If the research is funded, add the funding source to the appropriate table below.

NOTE: Only the Principal Investigator (PI) of the grant or subcontract can add his or her own SPO Funding information in this section. The PI of the grant must also be listed in the Personnel Information section of the protocol in one of the following roles: Principal Investigator or Faculty Sponsor, Student or Postdoctoral Investigator, Co-Principal Investigator, Administrative Contact, or Other Contact. Training Grants can be added by anyone in one of the aforementioned roles. For step-by-step instructions, see [Add SPO Funding Quick Guide](#)

Not Funded

SPO - Funding

Add

Please click on Add to add SPO - Funding

Funding - Other

Add

Please click on Add to add Funding - Other

7) In the SPO – Funding pop-up, click on **Find Funding** or **Find Training Grant**.

SPO - Funding		Find Funding	Find Training Grant	Save	Cancel
SPO ID *	<input type="text"/>				
Sponsor Award ID	<input type="text"/>				
Sponsor	<input type="text"/>				
Prime Sponsor	<input type="text"/>				
Funding Status	<input type="text"/>				
Principal Investigator	<input type="text"/>				
Co-Investigator (s)	<input type="text"/>				
Admin Unit	<input type="text"/>				
Project Title	<input type="text"/>				
Amount	<input type="text"/>				
Start	<input type="text"/>				
End	<input type="text"/>				
Subcontracts	<input type="text"/>				

8) Another pop-up will appear with a list of your grants and contracts or training grants. Click on the **radio button** to choose the appropriate funding source and then click on **Save**.

Note: The SPO ID will be either the SPO proposal number (if pending) or the SPO award number (if awarded).

Sponsors				Save	Cancel
<input type="radio"/>	SPO ID	Sponsor Award ID	Primary Sponsor	Title	
<input type="radio"/>	028679-002	NSF-11234567	UC San Francisco	Eprotocol PROD Funding Info Testing in PROD as of November 16, 2011	
<input type="radio"/>	20111874		UC Davis	For Coeus-eProtocol Funding Testing 10/19/2011	

9) Once the funding information populates the fields in the SPO-Funding popup, click on **Save**.

SPO - Funding	
SPO ID *	028679-002
Sponsor Award ID	NSF-11234567
Sponsor	UC San Francisco
Prime Sponsor	NSF National Science Foundation
Funding Status	Active
Principal Investigator	
Co-Investigator (s)	
Admin Unit	RAC Research Administration & Compliance
Project Title	Eprotocol PROD Funding Info Testing in PROD as of November 16, 2011
Amount	\$5,000
Start	2/1/2010
End	1/31/2013
Subcontracts	University of California, Davis

10) The grant (or subcontract) will appear in the SPO – Funding table. **Save** this screen before closing out of the protocol.

- To view funding details, click on the **Funding Type** link.
- To delete the grant, select the grant using the **checkbox** and click on **Delete**.
- To add another grant, repeat steps 6 through 9.
- If ready to submit, see [Submit a Protocol Application](#).

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Not Funded

SPO - Funding		Add	Delete	
<input type="checkbox"/>	SPO ID	Sponsor	Sponsor Award ID	Title
<input type="checkbox"/>	028679-002	UC San Francisco	NSF-11234567	Eprotocol PROD Funding Info Testing in PROD as of November 16, 2011