Postdoc Match Request Record Guide

This document is designed to help you, as a principal investigator, a department administrator, or a coordinator working on a submission on behalf of your Principal Investigator (PI), to create a new post-doctoral fellow (postdoc) match request.

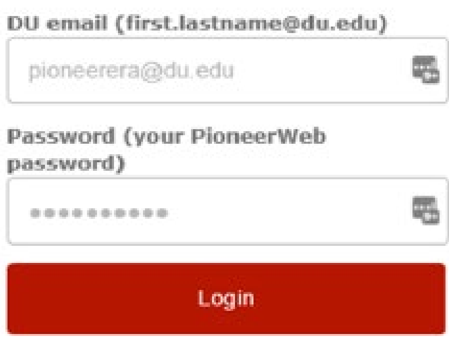
Please note that users must have an InfoEd account to create a new Postdoc match request. If you are not sure about your access to the system or if you wish to receive access, please contact your Grant and Contract Administrator.

Refer to the Post Doctoral Fellow Matching policy for details on the match and eligibility.

Step 1: Login to InfoEd

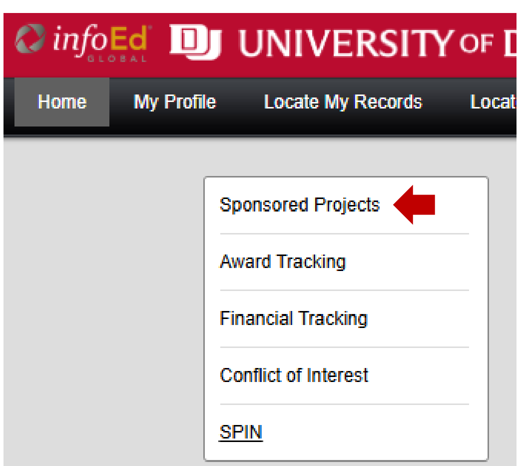
In your preferred internet browser, navigate to InfoEd (pioneerera.du.edu).

You will use Single Sign on to login. Enter your DU email address and password. Select 'Log in.' DU's Multifactor Authentication is also required to login.

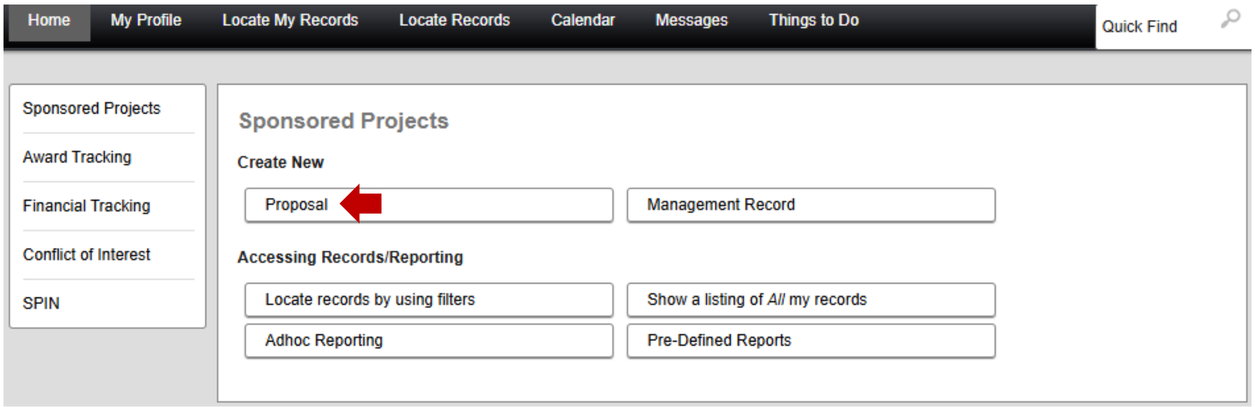


Step 2: Creating the Postdoc Match Request Record

Once you are on the InfoEd home page, select 'Sponsored Projects' on the left-hand sidebar of your homepage.

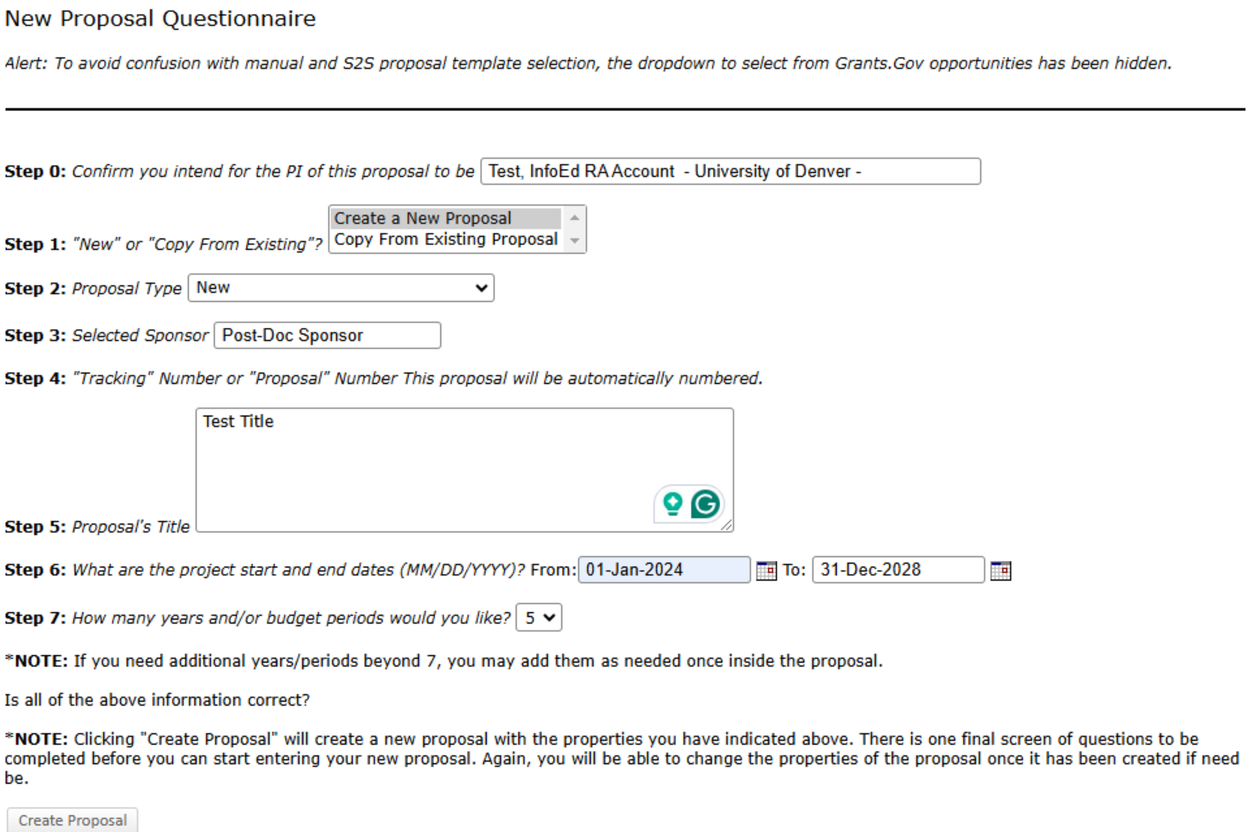


Select the 'Proposal' tile under Create New. This opens the "New Proposal Questionnaire" in a new pop-up window.



This opens the "New Proposal Questionnaire" pop-up window. You are required to fill in some basic information that includes PI name, Proposal type, Sponsor name, Proposal title, Start and End dates, and Number of Periods.

Important: Never close the browser when working on the new proposal questionnaire. To ensure proper record creation, you should complete all seven steps and click 'create proposal.' Exiting the pop-up will cancel proposal creation. Please fill out the steps as follows:



New Proposal Questionnaire

Alert: To avoid confusion with manual and S2S proposal template selection, the dropdown to select from Grants.Gov opportunities has been hidden.

Step 0: *Confirm you intend for the PI of this proposal to be* Test, InfoEd RA Account - University of Denver -

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

Step 2: *Proposal Type* New

Step 3: *Selected Sponsor* Post-Doc Sponsor

Step 4: *"Tracking" Number or "Proposal" Number This proposal will be automatically numbered.*

Step 5: *Proposal's Title* Test Title

Step 6: *What are the project start and end dates (MM/DD/YYYY)?* From: 01-Jan-2024 To: 31-Dec-2028

Step 7: *How many years and/or budget periods would you like?* 5

***NOTE:** If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.

Is all of the above information correct?

***NOTE:** Clicking "Create Proposal" will create a new proposal with the properties you have indicated above. There is one final screen of questions to be completed before you can start entering your new proposal. Again, you will be able to change the properties of the proposal once it has been created if need be.

Create Proposal

Step 0: By default, the person creating the proposal is listed as the PI. To modify, click in the text box and begin typing the desired PIs name. Select the correct name from the search list. If the PIs name is not included in the search, contact your grant and contract administrator to add them to the database. The PI can be changed later if needed.

Step 1: Select ‘Create a New Proposal.’ A new proposal is a blank or empty proposal.

Step 2: Select the type of proposal for ‘Proposal Type.’

Step 3: In ‘Selected Sponsor’, instead of the sponsor’s name, enter “Post-Doc Sponsor”.

Step 4: No action required. The Proposal Tracking Number will be automatically created.

Step 5: Enter the Proposal’s Title.

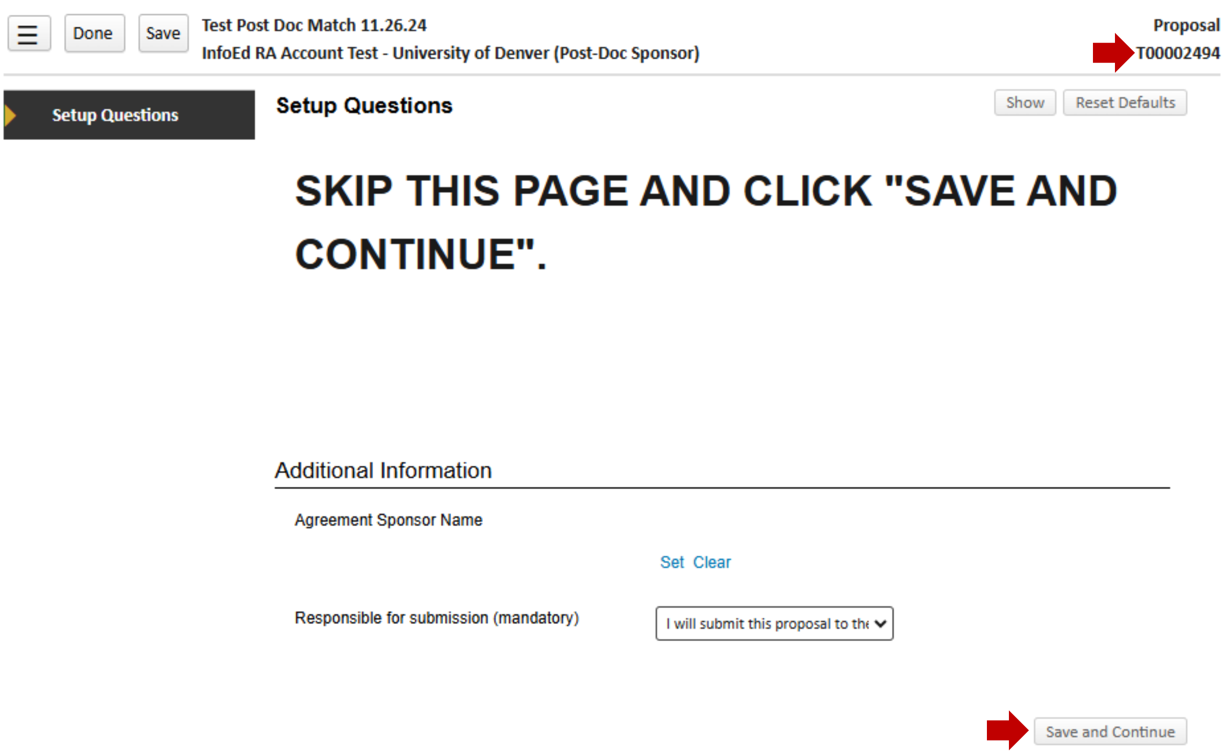
Step 6: Click the calendar icon to select project start and end dates or manually enter the dates in the format ‘DD-MM-YYYY.’ The dates can be adjusted after the post-doc match request is created, if necessary.

Step 7: The system will automatically assign the number of budget periods based on the dates entered. The assignment is based on a full calendar year. You may adjust the number of periods in the pick list. Review your responses for accuracy and select ‘Create Proposal.’

Note: Additional budget periods may be added later in the Budget section. You will still be able to modify some of the information you entered here, after proposal creation.

After you click ‘Create Proposal,’ wait for the page to finish configuring all the steps. Once it is complete, your proposal record will be created and will automatically open in a new window. From this point, the proposal record will be available in InfoEd for view/edit. Take note of the proposal tracking number in the top, right corner of the record (T0000xxxx) as you will use this to search for and update the postdoc match request in InfoEd (**NOTE:** in Step 4, you will change the tracking number manually).

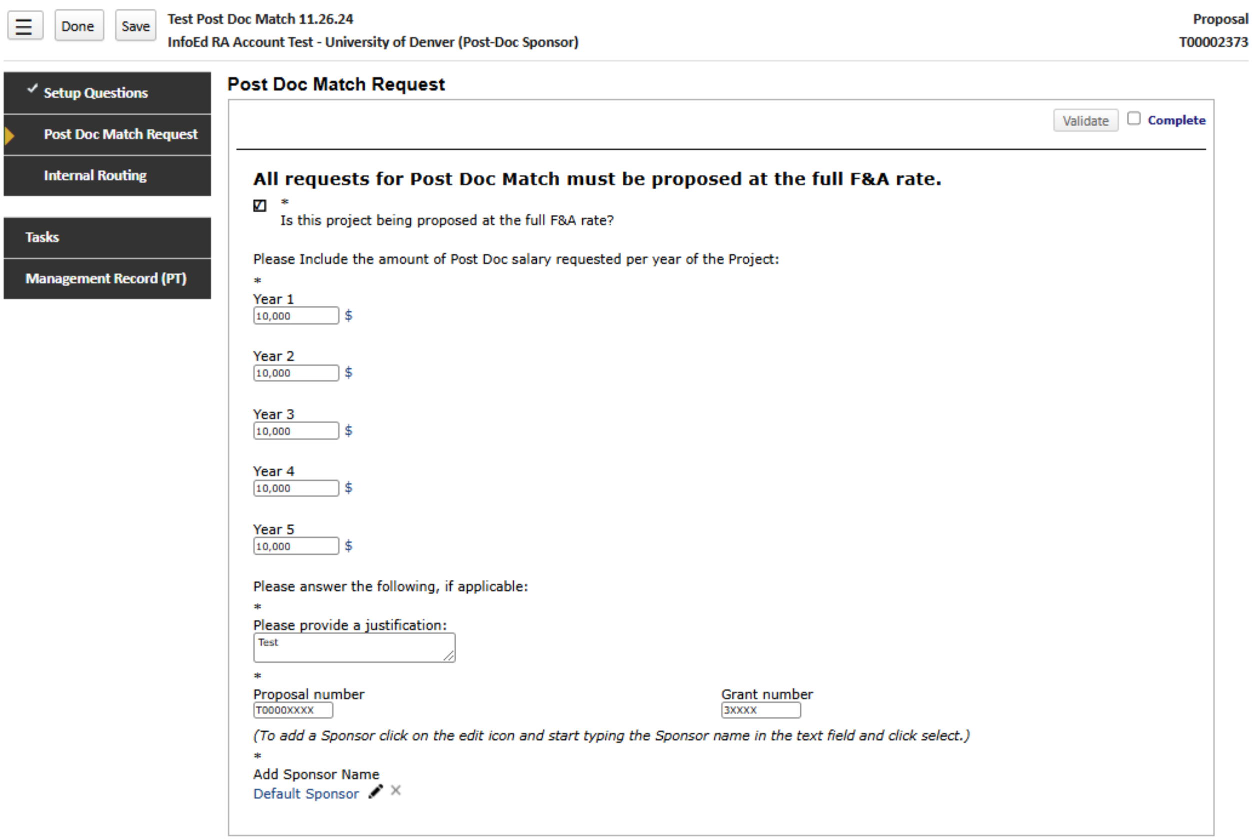
Complete the setup questions and select “Save and Continue”.



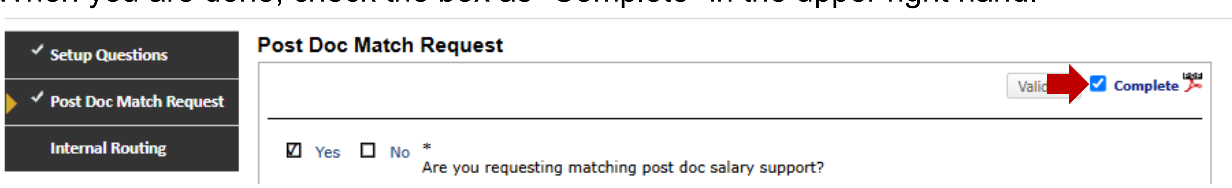
Step 3: Completing the "Postdoc Match Request" Tab

Fill out the "Post Doc Match Request" tab with the following information:

1. Mark that the project budget is proposed at the full F&A rate. Requests are only eligible if you use the full F&A rate.
2. Amount of requested post doc salary per project year (**REMINDER:** The request is for 25% of the salary ***only***). The request can include the calculated inflation from year to year.
3. Justification for post doc salary match request
4. Proposal number (if applicable)
5. Grant number (if applicable)
6. Sponsor Name



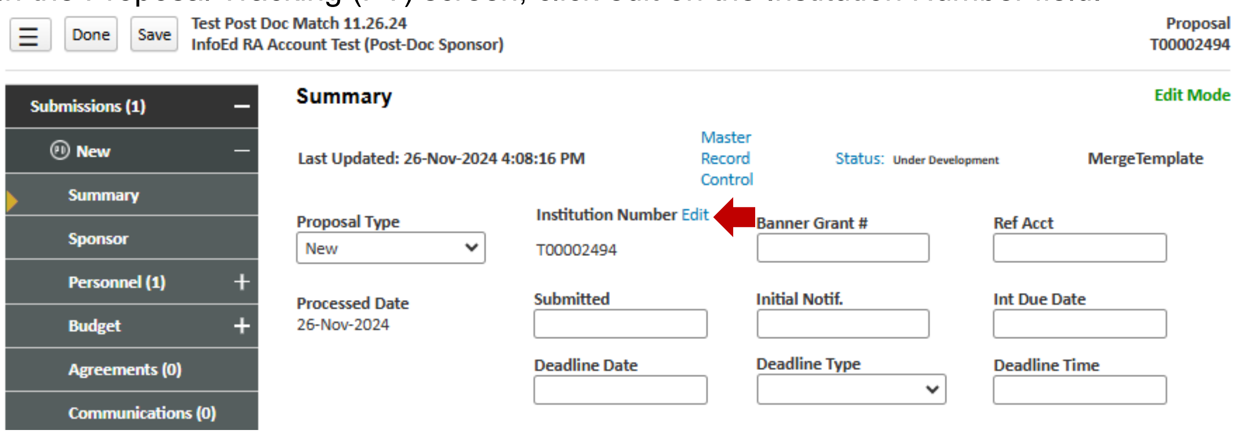
When you are done, check the box as "Complete" in the upper right hand.



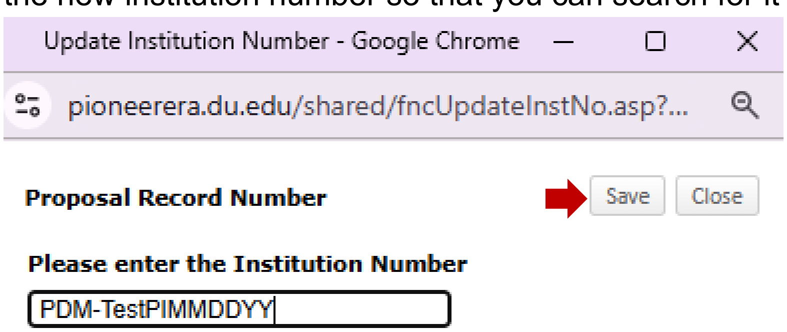
Step 4: Finalizing and Submitting the Record for Routing

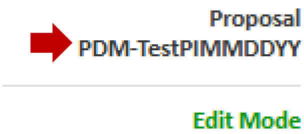
Go to the “Internal Routing” tab. Follow the steps 1-5 on the page. Start by clicking the “Management Record (PT)”.

In the Proposal Tracking (PT) screen, click edit on the Institution Number field.

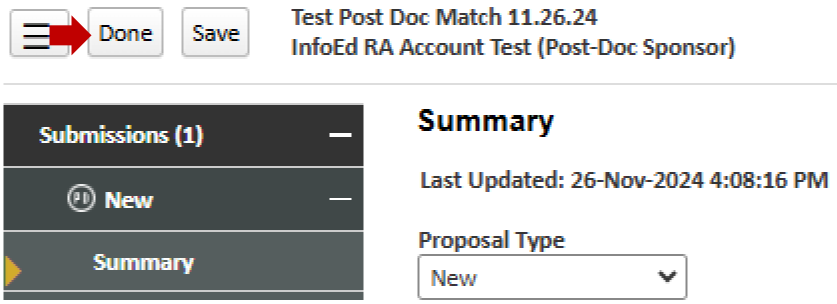


Update the institution number to “PDM-PILastNameMMDDYY” (example, PDM-Smith121224) and click “Save.” The record number will now be changed. Take note of the new institution number so that you can search for it in InfoEd.





Close the management record by clicking done.



Return to the “Internal Routing” tab. Check the box as “Completed” and then click “Submit”. This will route the record for internal review.