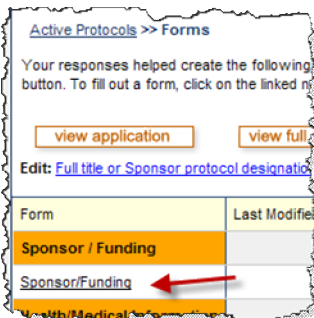


## Adding a Sponsor/Funding Source

1. Go to the Insight Research Portal: <https://insight.partners.org>
  2. Enter your Partners user name and password to login to Insight
  3. Click on the **go to Humans** button
  4. A Sponsor/Funding source can be added to a new protocol submission or added by amendment to an already approved protocol.
    - A. To create a new protocol submission, click the **create new protocol** button to complete the initial questionnaire and click the **save** button. You will then be brought to the Forms page.
    - B. To create an amendment to add a new sponsor/funding source to an already approved protocol, click the protocol title and select ‘amendment.’ Then click the **create new process** button. **Note: you do not need to remove a Sponsor/Funding source if the funding period has ended.**
- Complete the amendment form and answer ‘yes’ to the adding a sponsor/funding source question and click the **save** button. You will then be brought to the Forms page.
5. On the Forms page, click the Sponsor/Funding hyperlink to add a Sponsor/Funding source.



- Enter search criteria (1) to return the proposal record and click the search button (2).

**Sponsor / Funding**

**INSTRUCTIONS:**

- If the research will be supported by one or more funding sources, search Insight Agreements for the funding proposal(pending or awarded) supporting the research below.
- If more than one Agreement record is returned, click on the Insight Agreement number and PI name hyperlink to open the record for more information. When you have found the correct proposal, click the 'Add' button at the end of the row that lists the proposal.
- If the funding proposal has not been set up in Insight Agreements by Research Management OR the research will be conducted solely by Broad Institute, Shriners Hospital for Children, or Partners-in-Health investigators and no funding will go through MGH/BWH, select 'No funding proposal in Insight Agreements'.
- If there will be NO external sponsor/funding, no institutional award, or no sundry funds used to support this research, select 'None'.

**SEARCH INSIGHT AGREEMENTS**

Specify one or more search criteria and click search.

Proposal # : <input type="text"/>	Fund # : <input type="text"/>
Sponsor Name : <input type="text"/> Full (e.g. National Institute of Health) or short (e.g. NIH) <b>1.</b>	Award # : <input type="text"/>
PI: Yi, Charles Last Name, First Name	Proposal Title: <input type="text"/> Complete title is not required
Due Date: <input type="text"/>	<b>2.</b> <input type="button" value="search"/> <input type="button" value="clear selections"/>

**OR**  
SELECT ONE OF THE FOLLOWING:

NONE - There is no external sponsor/funding, institutional award or sundry funds supporting this research

No funding proposal in Insight Agreements

- In the search results, click on the Insight Agreement number and PI name hyperlink (1) to view the proposal. When you confirm it is the correct proposal, click the  button (2).

[Active Protocols >> Sponsor / Funding](#)

**Sponsor / Funding**

**INSTRUCTIONS:**

- If the research will be supported by one or more funding sources, search Insight Agreements for the funding proposal(pending or awarded) supporting the research below.
- If more than one Agreement record is returned, click on the Insight Agreement number and PI name hyperlink to open the record for more information. When you have found the correct proposal, click the 'Add' button at the end of the row that lists the proposal.
- If the funding proposal has not been set up in Insight Agreements by Research Management OR the research will be conducted solely by Broad Institute, Shriners Hospital for Children, or Partners-in-Health investigators and no funding will go through MGH/BWH, select 'No funding proposal in Insight Agreements'.
- If there will be NO external sponsor/funding, no institutional award, or no sundry funds used to support this research, select 'None'.

**SEARCH INSIGHT AGREEMENTS**

Specify one or more search criteria and click search.

Proposal # : <input type="text"/>	Fund # : <input type="text"/>
Sponsor Name : <input type="text"/> Full (e.g. National Institute of Health) or short (e.g. NIH)	Award # : <input type="text"/>
PI: Yi, Charles Last Name, First Name	Proposal Title: <input type="text"/> Complete title is not required
Due Date: <input type="text"/>	<input type="button" value="search"/> <input type="button" value="clear selections"/>

Record 1 - 10 of 10 | Page 1 of 1 First Page | Previous Page | Next Page | Last Page

Proposal Information	Fund #	Award #	Award Date	Award Status	Add Proposal
<a href="#">2010A054654-Yi, Charles S (-)</a> NH New Proposal Created for Charles Yi on 22-Jul-2010 2:06:15 PM	NA				<input type="button" value="Add"/>
<a href="#">2010D000465-Yi, Charles S (-) 10AA-MGH</a> <b>1.</b>	NA		8/1/2011	Awarded	<input type="button" value="Add"/> <b>2.</b>
<a href="#">2011A051357-Yi, Charles S (-)</a> Michael J. Fox Foundation New Proposal Created for Charles S Yi on 07-Apr-2011 6:39:17 PM	NA				<input type="button" value="Add"/>

Record 1 - 10 of 10 | Page 1 of 1 First Page | Previous Page | Next Page | Last Page

**OR**  
SELECT ONE OF THE FOLLOWING:

NONE - There is no external sponsor/funding, institutional award or sundry funds supporting this research

No funding proposal in Insight Agreements

8. The eIRB Sponsor form will open with information from the proposal pre-populated. Complete the rest of the form and click the **save** button. Repeat if more than one Sponsor/Funding source.

The screenshot shows the 'Sponsor Funding' form. At the top right, the title 'Sponsor Funding' is visible. Below it, there is a 'Name:' field with 'NH' entered. The main section is titled 'Select the source of funding that will be used to support the proposed research:' and contains five radio button options: 'Government / Foundation / Other Non-Profit' (selected), 'Corporate', 'Institutional Award', 'Department Funds', and 'None'. Below this is the 'Indicate application type:' section with two radio button options: 'Grant / Contract (direct award to a Partners Institution, e.g. BWH or MGH)' (selected) and 'Subcontract (from another institution to BWH or MGH)'. The final section is 'Indicate the applicant institution:' with two radio button options: 'BWH' and 'MGH' (selected).

**Note for Amendments:** If you are adding an additional funding source to an already approved protocol, only one sponsor/funding source can be listed as the ‘primary’ source. This is done by answering ‘yes’ to the question ‘Is this the primary source of funding’ located in the Sponsor/Funding form (See Fig 8.2).

If you are adding a new primary source, you would need to click on the previously approved Sponsor/Funding form listed on the Forms page of the amendment (See Fig 8.3) and change the primary question to ‘no.’

If there is no other previously completed Sponsor/Funding form on the Forms page of the amendment, you will need to answer ‘yes’ to the primary source question on the new Sponsor/Funding form.

This close-up shows the question 'Is this the primary source of funding?' with three radio button options: 'Yes', 'No', and 'Not applicable'. The 'Yes' option is currently selected.

Fig 8.2

This screenshot shows a list of 'Sponsor / Funding' sources. The first entry is 'NH [DHHS]' and the second is 'Clafin Distinguished Scholar Award [Internal]'. Two red arrows point to the 'NH [DHHS]' entry, indicating it is the one to be modified.

Fig 8.3