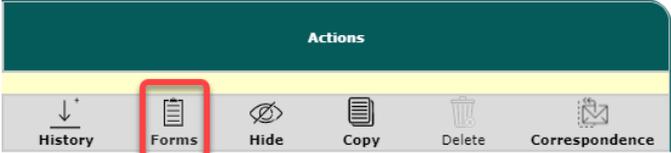


How to Create an *Early Setup Request* Form

Objective: Create an *Early Setup Request* form in VERAS.

Who: Project Personnel and DGAs can start the request form.

1. Log in to <http://veras.uidaho.edu/>
2. If you are listed as personnel on the proposal, select the **Forms** icon under the *Project Assistant* workspace's *All Projects* table **Actions** menu:



- a. Selecting the **Forms** icon will open a list of available forms to choose from, and you will select either **Start a new Submission** or **Edit Incomplete Submissions** to start the request form process.

Additional Study Submission Forms

| Proposal Items | Version List | Start a new Submission | Edit Incomplete Submissions |
|--------------------------|--------------|------------------------|-----------------------------|
| Early Setup Request Form | | | |
| Supplemental Proposal | | | |

Icon will appear if a form has been created but not yet submitted.

- b. Note that your incomplete forms are viewable from Project Assistant under the **Forms Pending Submission** link.



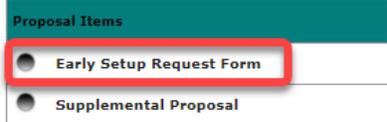
At the top of your Project Assistant workspace, you can view how many forms pending submissions you have.

3. If you are not listed as personnel on the proposal, you will need to search for the proposal.



- a. Under *Project Assistant* Workspace, select **Find a Project**
- b. Search for the applicable proposal number and select the pencil/paper icon to open.
- c. Select the form name

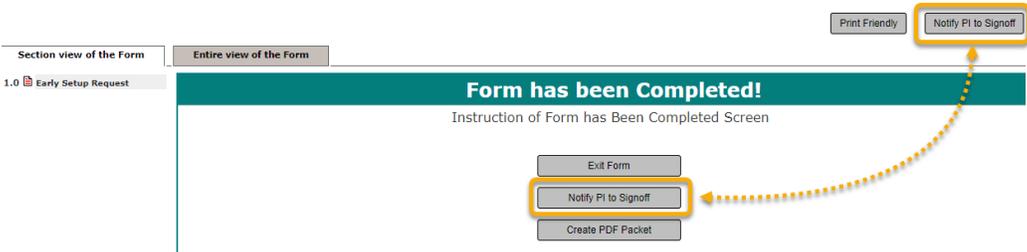
Additional Study Submission Forms



- d. Start a new form by selecting

4. Complete the applicable information in the request form. This form will automatically require the PI to sign off and approve the submission before it goes to the OSP submission queue.
 - a. If someone besides the PI authors the form, they must select **Notify PI to Signoff** for the PI to receive a system notification at the end of the form.

How to Create an *Early Setup Request* Form



- b. Note that if it's determined that the request will need additional approval signatures (i.e., Department Chairs for requests requiring departmental guarantee), OSP will separately route the request to the additional personnel for approval after it enters the OSP submission queue.
- 5. When OSP receives the submission, the project status will change to **Early Setup – Requested**.

| Click to open | Project Status | Review Board | Proposal Number | Sponsor Due | Project Title | Principal Investigator | Actions |
|---------------|-------------------------|--------------|-----------------|------------------|---------------|------------------------|---------|
| | | | Award Number | Grant Office Due | Short Title | | |
| | Early Setup - Requested | Post Award | 12345678 | 12/31/2023 | 12345678 | John Doe | |

Note, you can find previously completed forms in the **Project Submission Status** summary under the *Completed* tab.

| Projects Submission Status - Completed | | | | | | |
|---|-----------------|-----------|---------------|-------------|----------------|---------|
| Search for Project Title, Proposal/Award Number | | | | | | Search |
| In Progress | | Completed | | | | |
| 82 result(s) found... 1 - 10 | | | | | | |
| Click to open Project Dashboard | Proposal Number | Form Name | Project Title | Form Author | Date Submitted | Actions |
| | Award Number | | Short Title | | | |