SPONSORED PROGRAMS ADMINISTRATION TOOL: Quick Glance (Routing ADIS Internal Forms)
Version: 25 January 2021
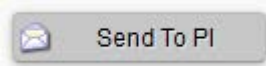
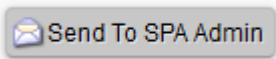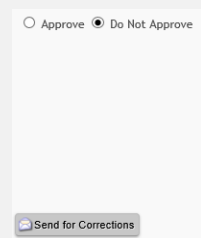**Scope: This SPA Tool covers only the routing of ADIS Internal Forms for SPA purposes, specifically for grants.**
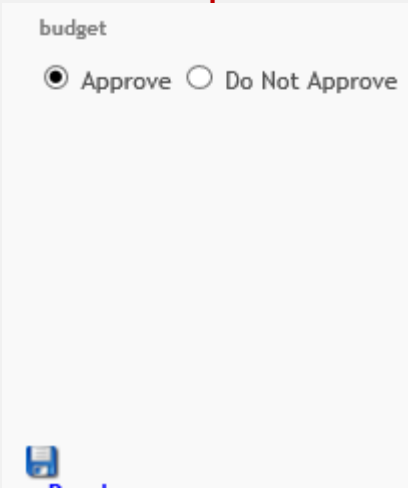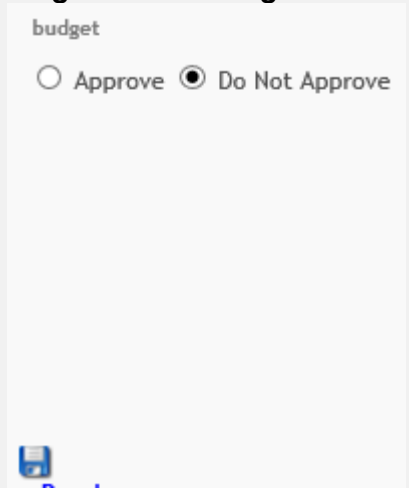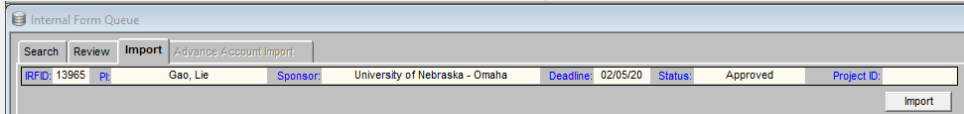- Refer questions about other ADIS functionality (e.g., Personnel Records, Reports) to the responsible unit or the IT Help Desk.

Note: A table of **Types of ADIS Internal Forms** (that you can start) and then the **Type of Submission** (that you must then select) within the just-created form is found at the *END* of this document.

The **purpose** of ADIS Internal Forms is to:	Legend:	The following items are **not** submitted in ADIS:
• Collect information to support SPA review of a submission to an external sponsor, including the budget; • Document PI/Dept/Operating Unit approval for the submission; and, • Create an internal administrative record for import into SPA's database and for use as the basis of internal award setup.	• Dept. Admin. • Principal Investigator (PI) • SPA Analyst • SPA Manager • All Other Signers	• Re-budgets • Child accounts • Closeouts

Life Cycle	ADIS IF Status	Campus Customers	SPA
Proposal development	0. Not started	To initiate ADIS Internal Forms, log into: https://edge.unmc.edu/adis using your UNMC log-in. Go to Manage Grants/Contracts and then Internal Forms – Search Projects. To reduce the chance of duplicate records, ADIS requires users to search for a project before inserting new Internal Forms. Only after the Search is executed will ADIS provide the "Insert" button to initiate a new ADIS IF record: 	

Life Cycle	ADIS IF Status	Campus Customers	SPA
Proposal review	**1. In Progress**	As soon as the **Dept. Admin**. saves the first page, an ADIS Internal Forms ID # is assigned, and it appears in SPA's queue.	SPA can see the ADIS IF in its queue, including the due date. If SPA was *NOT* aware of this upcoming submission, **SPA** will contact the Dept. Admin. for more information.

ACTION TO COMPLETE: The **Dept. Admin**. routes the ADIS Internal Forms to the Principal Investigator.

| | **2. PI Signature** | To review the ADIS Internal Forms record, the **Principal Investigator** logs into ADIS (see Row 0 above for login and navigation particulars). | If the Principal Investigator cannot sign, **SPA** can obtain their approval via email (using a template with the certification statements), and a **SPA Manager** can "sign" on behalf of the PI. |

ACTION TO COMPLETE: The **Principal Investigator** signs the ADIS Internal Forms in a 2-step action - (1) Check the checkbox next to the statement in red and (2) click the grey button to route it to the **SPA Analyst** selected as the contact.

☐ I agree to the above statements and approve all forms   📨 Send To SPA Admin

| | **3. SPA Review** | The ADIS Internal Form should be in the status of *SPA Review* 3-days *prior* to the Sponsor deadline per SPA's 3-Day Rule. | The **SPA Analyst** reviews the ADIS Internal Forms and submission documents. |

ACTION TO COMPLETE: The **SPA Analyst** signs the ADIS Internal Forms and routes it to the **SPA Manager** and **All Other Signers**.
ALTERNATE ACTION TO COMPLETE: The **SPA Analyst** rejects and returns the ADIS Internal Form to the status of *In Progress* for the **Dept. Admin.** to edit.
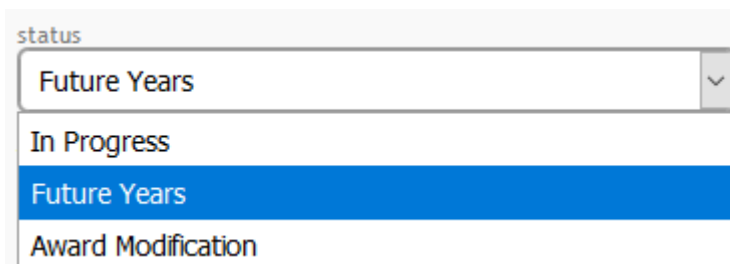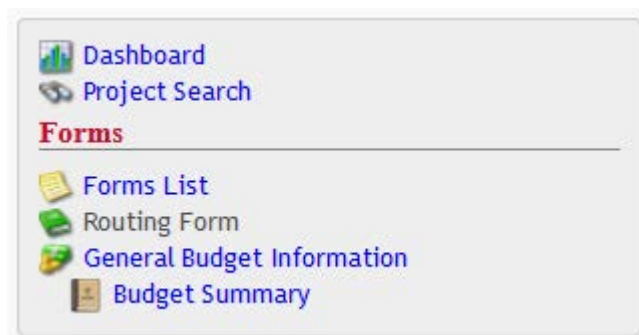
budget

● Approve ○ Do Not Approve

📨 Route for Signatures

○ Approve ● Do Not Approve

📨 Send for Corrections

Life Cycle	ADIS IF Status	Campus Customers	SPA
	4. Signature Routing	**All Other Signers** review and sign the ADIS Internal Form.	The **SPA Manager** reviews the ADIS Internal Form and submission documents.
		ACTION TO COMPLETE: When **SPA Manager** and **All Other Signers** have signed the ADIS Internal Form, it moves to the status of *Approved*. **ALTERNATE ACTION TO REJECT**: **SPA Manager** or **Any Other Signer** rejects the ADIS Internal Form to make it editable to the **Dept. Admin**. and **SPA**. It remains in *Signature Routing*. budget ⦿ Approve ○ Do Not Approve budget ○ Approve ⦿ Do Not Approve	
	5. Approved (*internal administrative record only, not approved for funding by sponsor*)	**All Other Signers** have signed. **SPA** reserves the right to delay submission of a proposal until the ADIS Internal Form documents all internal approvals as evidenced by the ADIS Internal Form signature documentation.	The proposal is ready for submission, and the ADIS Internal Form is ready for import.
		ACTION TO COMPLETE: The **SPA Analyst** imports the ADIS Internal Form into **SPA's database** (not visible to campus customers). Internal Form Queue Search Review Import Advance Account Import IRFID: 13965 PI: Gao, Lie Sponsor: University of Nebraska - Omaha Deadline: 02/05/20 Status: Approved Project ID: Import	

Life Cycle	ADIS IF Status	Campus Customers	SPA
Proposal submission	**6a. Submitted,** *if single budget period*	ADIS Internal Forms are complete. No further action needed.	**SPA Analyst** verifies all submission-related actions are complete.
	6b. Future Years, *if multiple budget periods*		

SUBMISSION OF THE ADIS INTERNAL FORM IS COMPLETE.

AFTER SUBMISSION:
Either the **Dept. Admin**. or **SPA** can move the ADIS Internal Form from *Submitted* or *Future Years* to *Award Modification*, if appropriate.
Either the **Dept. Admin**. or **SPA** can move the ADIS Internal Form from *Future Years* to *In Progress*, if appropriate.

POSSIBLE ACTIONS WHEN NOTICE OF AWARD RECEIVED *OR* PROGRESS REPORT DUE			
Award set-up	Award Modification	*How to open for edits:* The ADIS Internal Form is opened for edits by the **Dept. Admin.** or SPA Analyst by changing the status to Award Modification. The **Dept. Admin.** can independently change the status without SPA involvement. *Why*: To revise proposed budget to match sponsor-approved budget in order to set up award (current year, before set-up).	
Non-competing continuation	In progress	*How to update next budget period*: If the ADIS Internal Form record contains multiple budget periods, then the next budget period is opened for updates by the **Dept. Admin**. or SPA Analyst by changing the status to *In Progress*. The **Dept. Admin.** can independently change the status without SPA involvement. *Why*: To update and route the next budget period (subsequent year to support the non-competitive application Research Performance & Progress Report "RPPR").	

Types of ADIS Internal Forms (Selection when an ADIS Internal Form is started)	Routing/Budget ADIS Internal Forms Proposal Types for Grants (Selection within a newly started ADIS Internal Form)

Form to Add
○ Routing/Budget
○ Supplement
○ Advance Account
 	
Form to Add
○ Routing/Budget
○ Supplement
○ No Cost Extension
 	
• **Routing/budget** (*most common*): See proposal types (next box)
• **Supplement**: Additional funding for an existing budget period, does not change the budget period
• **Advance Account**: Must be tied to an existing, pending request
• **No-cost extension**:
 	
   ○ If sponsor approval/notification is required, this only captures information.
 	
   ○ If sponsor approval/notification is not required, this captures information (e.g., justification, effort) and generates an internal memo.
	proposal type ★
	New
	Revised New
	Continuation
	Renewal
	Revised Renewal
	Supplement
	
	New: Submitted to sponsor for first time (no PID)
	Revised New (resubmission): Re-submitted to sponsor after unsuccessful previous attempt (should have a PID)
	Continuation: Non-competing request for subsequent budget period within approved project period (should have PID)
	Renewal: Submitted to sponsor for additional funding for new project period subsequent to current award (should have PID)
	Revised Renewal: Re-submitted to sponsor for additional funding for a project period subsequent to the current award, after unsuccessful previous renewal attempt (should have PID)
	Supplement: Additional funding for existing budget period (should have PID), does not change the budget period

Signers and designees

Principal Investigator (PI)	All Other Signers College deans (*required*), department chairs (*required*), and College of Medicine – Internal Medicine division chiefs (*optional*)
• Cannot designate alternate signers • Can approve via email if unable to sign in ADIS, but *must* cite the ADIS Internal Forms ID #.	• Can designate alternate signers • Should *NOT* be **Principal Investigator** or "prepared by" person