![insight]

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.**

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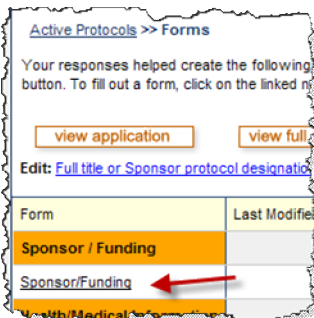
6. Enter search criteria (1) to return the proposal record and click the search button (2).

7. 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 Add button (2).

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 then one Sponsor/Funding source.

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.

Fig 8.2

Fig 8.3