

Use this tab to provide the information necessary for the IRB to perform congruency reviews between sponsor proposals and the IRB protocols.

The entries made in this field are critical for ensuring that the IRB has the information it needs to perform the review required by federal regulation and University policy. Specifically, the University will not certify to the sponsor that the research has been approved by the IRB and the project funding will not be released until IRB approval and congruency have been verified by Yale's Grant & Contract Administration (GCA).

1. Click on the **Funding Source** link.



The **Funding Source** screen displays:

The 'Add Funding Source' form includes a 'Type:' dropdown menu with 'Please Select...' as the current selection. Below it are input fields for 'Number/Code:' and 'Name/Title:', each with a 'Search' button to its right. A 'Save' button is located at the bottom left of the form.

2. Click on the drop down menu and select the **Type** of funding source. The choice displays:

Note: Select **Sponsor** when the protocol is fully or partially funded by an external entity. Select **Unit** to denote when the research is funded by departments *within Yale*.

A dropdown menu labeled 'Type:' with 'Sponsor' selected and a downward arrow on the right side.

3. Click on **Search** and the **Sponsor Search** screen displays:

The 'Sponsor Search' form has two input fields: 'Sponsor Code:' and 'Sponsor Name:'. Below the fields are 'Search' and 'Cancel' buttons.

4. In the **Sponsor Name** field, enter the name of the funding source with * on both sides of the word (this is known as a wild card).

The 'Sponsor Search' form with 'YCCI*' entered in the 'Sponsor Name:' field. 'Search' and 'Cancel' buttons are visible below.

5. Click **Search**. CTSA-YCCI displays as the sponsor name.

The 'Sponsor SearchResult' table shows search results. The first row is highlighted and contains the following data:

SPONSOR_CODE	SPONSOR_NAME	ACRONYM	SPONSOR_TYPE_DESCRIPTION	POSTAL_CODE	STATE	STATE_DESCRIPTION
CTSA	CTSA-YCCI		Other_State, City, Foreign, Non-Medical		CT	Connecticut

6. Click on the CTSA-YCCI link to choose it. The sponsor displays in the **Number/Code** field.

The 'Add Funding Source' form with 'Sponsor' selected in the 'Type:' dropdown. The 'Number/Code:' field contains 'CTSA' and the 'Name/Title:' field contains 'CTSA-YCCI'. A 'Save' button is at the bottom.

7. Click **Save**. The sponsor displays in the **List of Funding Source**:

List of Funding Source		
Type	Number/Code	Name/Title
Sponsor	CTSA	CTSA-YCCI

8. Add additional funding sources as needed. Be sure to save each source as you enter it.

Data Entry Required for Congruency between Proposals and Protocols – ProSum Number

To provide congruency information about a pending proposal do the following.

9. Search on the name of the Sponsor and click **Save**. This will populate the name of the Sponsor into the List of Funding Sources.

List of Funding Source		
Type	Number/Code	Name/Title
Sponsor	CTSA	CTSA-YCCI

10. To enter the Proposal Summary and Certification number (ProSum), from the drop down box, select OTHER. This opens the field for editing. Type in the ProSum (or M or C) number.

Add Funding Source	
Type:	Other
Number/Code:	CTSA Pending M09 34567
Name/Title:	
Save	

11. Click **Save**. The ProSum number displays.

List of Funding Source		
Type	Number/Code	Name/Title
Sponsor	CTSA	CTSA-YCCI
Other	CTSA Pending M09 34567	

Data Entry Required for Congruency between Proposals and Protocols Award Numbers

12. Search on the name of the Sponsor and click **Save**. This will populate the name of the Sponsor into the List of Funding Sources.

List of Funding Source		
Type	Number/Code	Name/Title
Sponsor	CTSA	CTSA-YCCI

13. To enter the related number, from the drop down box, select OTHER. This opens the Number/Code field for editing. Type in Sponsor name abbreviation and the award number. Click **Save**.

Add Funding Source	
Type:	Other
Number/Code:	Award R01 23456
Name/Title:	
Save	

14. Click **Save**. The award number displays.

List of Funding Source		
Type	Number/Code	Name/Title
Sponsor	CTSA	CTSA-YCCI
Other	Award R01 23456	