PI/Study Team – Adding a Sponsor

External Sponsors (non-UM affiliated sponsors) and/or Internal Sponsors (including department or PI discretionary funding) can be added to a study application when the study is in an editable State (e.g., Pre Submission). If the study does not require sponsorship, you must indicate so in section 2.8 of the study application.

The following procedure demonstrates adding an External Sponsor; however, you can apply the same steps to add an Internal Sponsor.

**Important Information**

If the study application is in a non-editable State (e.g., Active), you must create an amendment to add or edit sponsor information. See the Creating an Amendment step-by-step procedure for details.

**eResearch Study Application**

1. Click the **Name** of the study to open the Study Workspace, and then click **Edit Study** (not shown).
2. Use the **Jump To:** menu to navigate to section **02. Sponsor Information**.
3. Under **External Sponsor(s)/Support**, click **Add**.

**Sponsor Detail Window**

4. Click the Select button to open the Select a Sponsor window.

1. Click the **Name** of the study to open the Study Workspace, and then click **Edit Study** (not shown).
2. Use the **Jump To:** menu to navigate to section **02. Sponsor Information**.
3. Under **External Sponsor(s)/Support**, click **Add**.
4. Click the Select button to open the Select a Sponsor window.
5. Enter a search term by **Acronym** or by **Name** in the fields provided.

   **Note:** Use the percent sign (%) as a wildcard character to search using a partial name.

6. Click **Find**.

7. Click the radio button next to the correct Sponsor in the list that appears (not shown).

   **Note:** If the Sponsor does not appear in the list, enter the name of the Direct Sponsor/Support in the **Sponsor Detail Window** (question 2.2).

8. Click **OK**.

9. Click the applicable radio buttons to complete the rest of the Sponsor Detail window.

   **Notes:**
   - All fields marked with a red asterisk (*) are required.
   - Additional sections may display depending on the selections made.

10. Click **Yes** or **No** to answer if there is an existing Proposal Approval Form (PAF) for the study.

    **Notes:**
    - External Sponsors will usually have an existing (PAF).
    - If **No** is selected, an upload question will appear.

11. If **Yes** is selected, click **Add**.
Adding a Sponsor
Step-by-Step Procedure

**Add Associated Proposal Window**

12. Enter the search criteria.
13. Click **Find**.
14. Click the radio button next to the correct PAF in the list that appears (not shown).
15. Click **OK** to return to the Sponsor Detail Window, or click **OK and Add Another** to add another PAF.

**Sponsor Detail Window**

16. After completing the rest of the questions on the Sponsor Detail Window, click **OK** to return to the study application, or click **OK and Add Another** to add another External Sponsor.

**eResearch Study Application**

17. Verify the sponsor is listed on the study application.
18. Click **Save**.