



SAGE Quick Start

What it is

SAGE is a web-based tool that supports the UW's internal compliance process by enabling the electronic submission, routing, review, and approval of grant applications and subcontracts and their related Grants and Contracts forms (GC1s).

When to use it

An eGC1 must be completed in SAGE in each of the following situations:

- ☑ When applying to be the subcontractor on a Subcontract.
- ☑ When completing grant pre-applications.
- ☑ When applying for grant applications - including new applications, revisions, re-submissions, renewals, supplements, extensions and transfers from other institutions.
- ☑ To acquire a budget number for money that has already been received from a Sponsor.

How to get access

Access and roles for SAGE are provided via ASTRA. Your Unit's ASTRA Administrator is responsible for granting access and assigning roles for SAGE.

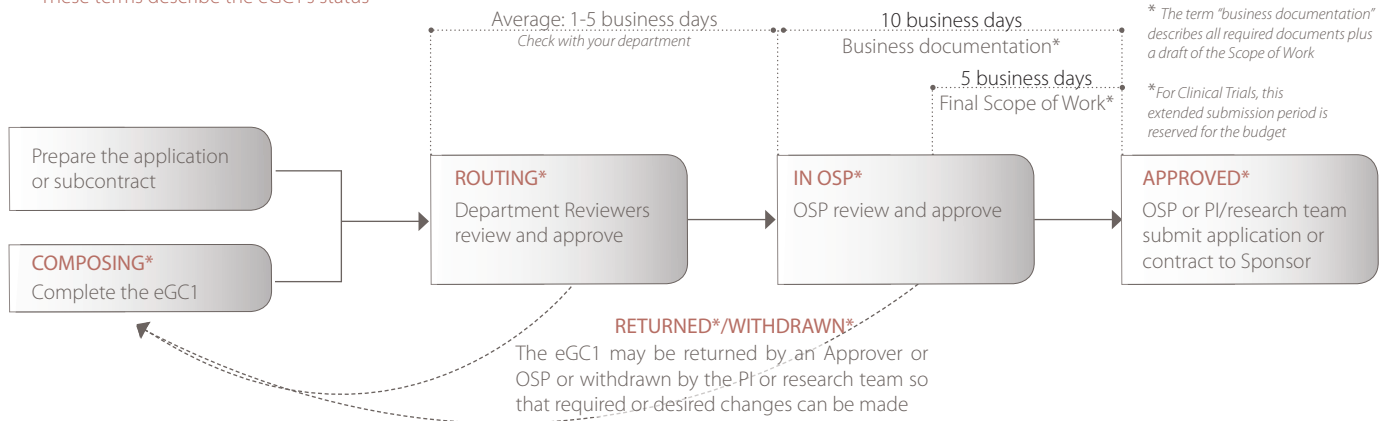
SAGE Roles

- **Approver:** Approvers review and approve eGC1s. They are able to view all eGC1s within specified organizations.
- **PI (Principal Investigator):** The PI reviews and approves all eGC1s on which they are the primary PI. They are able to view all eGC1s on which they are the PI.
- **Preparer:** Preparers create the eGC1 and/or are the Administrative or Budget contacts within the eGC1. They can see eGC1s they have initiated, or to which they have been added.

Sharing access: eGC1s can be shared with people who are not Preparers, Approvers or the PI by using the **Assign Access** feature (located at the top of the side menu when an eGC1 is open).

The eGC1 process

*These terms describe the eGC1's status



SAGE Acronyms

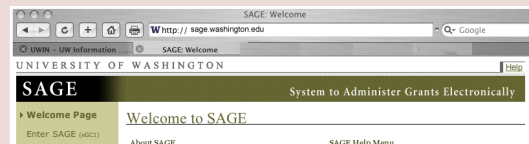
- eGC1 electronic Grants and Contracts form 1
- eRA electronic Research Administration
- OSP Office of Sponsored Programs
- PI Principal Investigator
- SAGE System to Administer Grants
- SFI Significant Financial Interest

Getting started

Since SAGE is Web-based, you can access it through your Web browser anytime or anywhere!

Before you start, turn off your pop-up blocker... SAGE conveniently displays some content in separate pop-up windows.

SAGE is located at: sage.washington.edu.





SAGE Quick Start

Composing

Composing is the initial state of the eGC1 in which it is visible only to the PI, any additional Preparers, and anyone who has been assigned access. The eGC1 remains in Composing until physical steps are taken to route it to Approvers and OSP for review and approval.


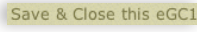
Creating the eGC1

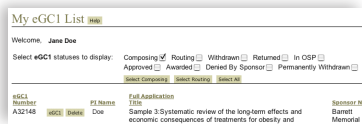
Create New eGC1

To create a new eGC1, select **Create New eGC1** from the toolbar.

Completing the eGC1

Here are some quick tips to help you navigate through the eGC1:

- All fields marked with a * must be completed before routing.
- Use the side menu, or the **Previous** and **Next** buttons to navigate through the pages. Information is automatically saved when you navigate to another page. 
- It may be necessary to save and close the eGC1 and return to work on it at a later time. To save and close the eGC1, select **Save & Close this eGC1** from the side menu. 
- To re-open an eGC1 (while it is in Composing), select **eGC1** - located adjacent to the eGC1 number in the **eGC1 List**.




A **SAGE 101** class is available for more detailed explanation and practice in completing the eGC1. Contact information for SAGE Learning is provided at the bottom this page.

Attaching documents

Grant applications, subcontract letters, and all supporting documents are attached to the eGC1 on the **Attachments and Routing Questions** page.

When attaching documents to your eGC1:

- Prepare grant applications before attaching them: order the pages in the sequence specified in the Sponsor's guidelines, and combine them within a single file - either PureEdge or PDF format. If you are using PDF format and there are signature pages, create a second PDF file containing a copy of just the signature pages. 
- Attach all documents that will ultimately be submitted to the Sponsor under the **Documents to be Submitted to Sponsor** section of the **Attachments and Routing Questions** page.
- Attach documents that will not be submitted to the Sponsor, but are needed internally by OSP under **Internal Documents for OSP**.
- Attach documents that are required by your department but are not needed by either the Sponsor or OSP under **Internal Documents for Dept/School/College**.

A **SAGE 201: Attaching Documents** class is available for further explanation and practice in attaching documents to eGC1s. Contact information for SAGE Learning is provided at the bottom this page.

Routing

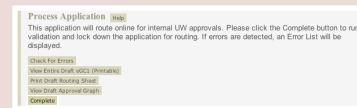
Routing is when an eGC1 is "exposed" to departmental Approvers and OSP for review and approval. During routing the eGC1 may be returned for modifications or can be withdrawn by the Preparer or PI if needed.

Preparing for routing

Before you route, delete any draft documents that are no longer needed because after the first approval, you will no longer be able to totally remove documents from the eGC1 by deleting them (see the **Updating documents** section below for instructions on how to update documents during routing).

Routing the eGC1

To put your eGC1 into routing, select **Complete** - located at the very bottom of the **Certify, Complete and Print** page.

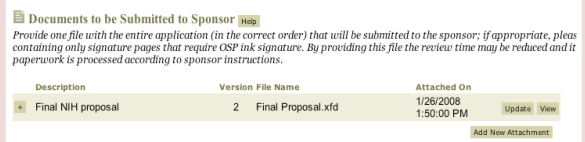


Removing the eGC1 from routing to make changes

To remove your eGC1 from routing, select **Withdraw** - located to the left of the eGC1 number in the **eGC1 List**.

Updating documents

After the first approval you can "change" existing documents using **Update**. **Update** enables you to attach newer versions over existing documents, and leaves a history trail.



Putting the eGC1 back into routing after changes

When your changes are complete, put your eGC1 back into routing by selecting **Complete** - located at the very bottom of the **Certify, Complete and Print** page.

Note: departmental Approvers who have already approved your eGC1 will not receive e-mails notifying them of the latest changes. This allows you determine which Approvers need to be informed based on the nature of the change and notify them accordingly.

In OSP

When all departmental Approvers have approved, the eGC1's status is automatically changed to **In OSP**, and the OSP review officially begins. Contact information for your departments OSP Administrator is available online at: www.washington.edu/research/osp/contact.html.

Approved

Once OSP has approved, the grant application or subcontract can be submitted to the Sponsor. You will no longer be able to withdraw the eGC1 for changes.