The Proposal Screen

Quick Reference Guide – Sponsored Programs

This Quick Reference Guide covers The Proposal Screen in the Sponsored Programs module of WRG. View the Quick Reference Guide for Creating a New Proposal for some background to this transaction.

Quick Instructions

1) **Setup Questions**: Before your Proposal Screen can expand, you must answer a few basic questions. Setup Questions will pull in information from your Program Announcement (PA) number.
    a. Note the Grants.gov Submission Information
    b. Deadline Information will populate automatically from the PA number, but you can update this here if necessary.
    c. Answer the questions under the subsequent sections (ex: General Proposal Properties, etc).
    d. Under Budget Setup information, select the Program Type and whether the majority of research will be conducted on or off campus.
    e. Click Save and Continue.
        i. *After answering the Setup Questions and clicking Save and Continue, you'll see the Proposal Screen expand.*
        ii. *The expanded sections pertain to the type of proposal you've selected.*
        iii. *Below is a fairly comprehensive list of items you may see on a standard System-to-System Grants.gov submission.*

2) **Universal Questionnaire:** This form contains additional questions pertaining to your application.
    a. Answer questions on the form.
    b. Additional branching questions may appear based on how you answer.
    c. Click the blue Save button in the top left corner of the page, followed by the Complete checkbox in the top right corner of the form.
    d. Note a blue checkmark next to the Universal Questionnaire link in the left navigation column, indicating this section is now complete.

3) **SF424**: Much of this form comes preloaded with institutional info but there may be additional questions required, which will typically be highlighted in yellow.
    a. Answer the highlighted questions on the form.
    b. Click the Save button, followed by the Completed checkbox.
        i. *You will see a prompt directing you to any missing information.*

4) **Budget**: The Budget tab is a complex transaction. Please view the associated Quick Reference Guide.

5) **Personnel**: This tab is where you'll list all personnel relevant to this proposal. It pulls in information you entered in the Budget tab, but you can add additional entries here (ex: Other Significant Contributors)
    a. Click the black Add Personnel tab if you need to add any additional personnel here.
    b. Review the personnel listed.
    c. Note whether or not their Conflicts of Interest survey has been completed (indicated with a green checkmark).
        i. *You can hover over this field.*
    d. Upload the CV / Biosketch of Key personnel.
    e. Upload Current / Pending Support if necessary.
    f. Click the Save button, followed by the Completed checkbox.

6) **Pre-Review Route**: (System-to-System Grants only). The Pre-Review Route allows both your department and OSRA to review administrative information and the application budget.
    a. Ensure there is a blue checkmark for all tabs above the Pre-Review Route on the left navigation panel.
    b. Click the Thumbs Up icon on the form.
        i. *A popup window will appear which goes over the process flow.*
    c. Click the Submit button.
        i. *This will now be submitted through the workflow.*
        ii. *You will be notified via email once the Pre-Review Route is complete*
        iii. *You can continue the application even while the Pre-Review Route is underway*
        iv. *Please make sure not to un-complete or edit any tabs above the Pre-Review Route.*

7) **Reviewer Checklist**: The Reviewer Checklist is where you'll go to view feedback from the approvers on this proposal, however no action is needed by you on this tab.

8) **Other Project Info**: This form collects additional information about the project. It populates with some of the questions you answered previously in the process and some additional ones you have to answer now. Note that the Other Project Info tab has absorbed the previous tabs: Project Summary, Project Narrative, References Cited, Resources, and Other Attachments.
    a. Answer any blank questions on the form
    b. Additional branching questions may appear based on how you answer.
    c. Click the Add Attachment button to upload any necessary documentation.
    d. Click the Save button, followed by the Completed checkbox.

9) **PHS 398 Research Plan**: Allows you to upload specific documentation that may be required for your proposal. You can also refer to the submission guides found on Grants.gov or the National Institutes of Health opportunity.
    a. Click the blue Upload link that pertains to the document you need to upload
        i. *If you're not sure what you need to upload, you can click the Completed checkbox (an error message will display, specifying which documents are required)*
    b. Click the Choose File button.
    c. Locate the file on your computer.
    d. Click the blue Upload link.
        i. You can view the Original or PDF versions of the document, or Remove it from the list.
    e. Repeat this process for any additional documentation that must be attached.
    f. Click the Save button, followed by the Completed checkbox.

10) **Performance Sites**: This outlines the sites where research will be conducted and is populated based on previous sections.
    a. Review the information on this page.
    b. Make any necessary changes.
    c. Click the Save button, followed by the Completed checkbox.

11) **PHS 398 Cover Page Supplement**: This form pre-fills information based on questions you've answered in other parts of the proposal.
    a. Answer any missing questions.
    b. Click the Save button, followed by the Completed checkbox.

12) **Human Subjects / CT**: The new Forms E package includes a new section you must fill out which pertains to Human Subjects and Clinical Trials. This new section will pull in your responses from the Setup Questions and Other Project Info sections you previously filled out.
    a. You would use this form if:
        i. Your study includes human specimens or data

        ii. Your study includes human subjects
        iii. Your research plan includes delayed onset
        iv. Your study is a clinical trial
    b. For a detailed walkthrough, view this resource from the NIH: https://www.youtube.com/watch?v=nz9NWFhYOG8
    c. Validation Tool: For NIH submissions we have included a validation feature that allows you to test your package in the system before sending it to NIH. The system will recognize which pieces of your application may potentially be rejected by NIH, allowing you to make those changes before you officially submit.

13) **Finalize**: The Finalize tab is a final review route where OSRA and other groups will perform a final thorough review of the application, including the final science and all remaining sections, before final submission to the sponsor.
    a. Ensure there are blue checkmarks all down the side of the left navigation panel.
    b. Click the blue Build button under the Build PDF / Form Pages heading.
        i. Note that if you make any changes to the proposal after this step—even un-checking a Completed checkbox—you will have to rebuild these pages.
        ii. It may take a minute to build the pages, depending on the type of proposal you're submitting.
        iii. The table expands with additional information once this step is finished.
    c. Click the Build Grants.gov Application button.
    d. Click the Thumbs Up icon under the Submit for Internal Review heading.
    e. Click the Submit button on the popup window, which outlines the process flow.

14) **Next Steps:**
    a. Once the final review of the proposal is completed, OSRA will notify the requester and send the package to the sponsor.
    b. For Grants.gov applications, the department and OSRA will be able to run Grants.gov validations prior to submission and view the final assembled package as it will later appear in the eRA Commons.
    c. If there are any required edits, OSRA will return the application for modification. Once complete, the department can resend for final review
    d. This process will also be available if the PI would like to make any changes following successful submission, as long as it's before the grant deadline.