ORS myGRANT Checklist

Please access myGRANT at https://mygrant.ors.hawaii.edu/mygrant/portal.do

**PROPOSAL TAB**

Be sure to fill in all fields marked with an asterisk (*).

Please make note of the Doc Nbr which is located at the top right corner of the page.

<table>
<thead>
<tr>
<th>Doc Nbr</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>20522</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Initiator</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>luannen</td>
<td>11:49 AM 04/19/2012</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>PI</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDUCATION, DEPT-FED</td>
<td>Andrew Teft</td>
</tr>
</tbody>
</table>

**Document Overview sub-tab**

Description – Describe the document’s purpose-a brief summary as to why it is being created

**Required Fields for Saving Document sub-tab**

1. **Proposal Type** – Identify the kind of project being submitted.

   *Continuation* - A proposal to continue an existing award.

   *New*

   *Post-Award Action* - Select this type in order to route modification documents or modifications to an award for already awarded proposals:

   - Change in PI
   - When a PI changes departments
   - Addition/deletion of or change in key personnel
   - Change in key personnel effort
   - Addition to or change in research certifications approval
   - Change in scope of work
   - Progress report involving significant change in scope of work where incremental funding is contingent upon progress report submittal
   - De-obligations
   - Change in allocation of indirect costs
   - Rebudget if it will result in a formal award modification
   - Change in conflict of interest disclosure
   - Addition of consortium
   - Change in performance site

   *Preliminary (non Grants.gov)* - A proposal in advance of submission of a full proposal.

   *Renewal* - A proposal for the next competitive funding cycle. For example, if an award for a five-year project has ended, a submission for a renewal might request funding for years six through ten.

   *Resubmission* - Select this for a corrected Grants.gov S2S submission that received validation errors after the initial submission.

   *Revision* - When the sponsor has requested a revision to the scope of work or budget in response to the original proposal.
Supplemental (non-Grants. Gov)- A proposal to add work and budget to an existing award. Do not select this type for Grants.gov S2S submissions.

Task Order- Project funded under a master agreement.

2. **Lead Unit** – will be pre-populated unless the initiator is listed as a Proposal Creator for more than 1 unit. If so, select the appropriate Lead Unit from the drop-down list.

3. **Activity Type**- select the appropriate type from the drop-down list

   - *Acquisititon of Research Equipment* - equipment other than instrumentation for which title passes to UH.
   - *Clinical Trial (federally funded)* - clinical trial funded by the Federal government
   - *Clinical Trial (non-federally funded)* - clinical trial funded by a company or organization other than the Federal government.
   - *Construction or Improvement of Facilities* - buildings or major renovations for which title passes to UH
   - *Education and Training* - funded by a grant or contract. Training of post-docs or graduate students in research techniques (research training) should be identified as “Research”.
   - *Fellowship* – Post-Doctoral- awards that provide support for individual post-doctoral fellowships
   - *Fellowship* – Pre-Doctoral-proposals that provide support for individual pre-doctoral fellowships
   - *Intergovernmental Personnel Act (IPA)*- agreements for assignment of personnel and reimbursement of salary and fringe benefits between government agencies.
   - *Other (non-research)*- work that does not fit into the other categories for which extramural support is being sought.
   - *Public Service* - outreach programs and community awareness
   - *Research* - study to increase scientific knowledge or understanding, application of knowledge to the production of useful materials, devices, and systems or methods.
   - *Ship Operations*
   - *Student Services* - services outside the formal instruction program
   - *Symposia, Conferences and Workshops* - short-term instructional or information sharing activity

4. **Project Title**- the proposed title of the project

5. **Sponsor Code**- The Sponsor Code is an alphanumeric code that is used by myGRANT to identify sponsors in the database. In order to find a specific sponsor code, click on the magnifying glass next to the “Sponsor Code” box.

   ![Sponsor Code](image)

   This will bring you to the Sponsor Lookup page.

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Select a key word from the name of your sponsor. For example, if you’re searching for the “Department of Education”, select “education” and enter it into the Sponsor Name field. Once the search results appear, click “return value” in the row with the correct sponsor to enter the appropriate sponsor onto the proposal.

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Sponsor Code</th>
<th>Sponsor Name</th>
<th>Acronym</th>
</tr>
</thead>
<tbody>
<tr>
<td>return value</td>
<td>00680X</td>
<td>DEFENSE, DEPT-EDUCATION ACTIVITY</td>
<td>DoDEA Federal</td>
</tr>
<tr>
<td>return value</td>
<td>00700A</td>
<td>EDUCATION, DEPT-FED</td>
<td>DOED Federal</td>
</tr>
<tr>
<td>return value</td>
<td>00700B</td>
<td>EDUCATION, DEPT-FED FULBRIGHT HAYS PGM</td>
<td>Federal</td>
</tr>
<tr>
<td>return value</td>
<td>00700C</td>
<td>EDUCATION, DEPT-FED FUND IMPRVNT OF POSTSEC ED</td>
<td>FIPSE Federal</td>
</tr>
<tr>
<td>return value</td>
<td>00700D</td>
<td>EDUCATION, DEPT-FED INST FOR ED SCIENCES</td>
<td>Federal</td>
</tr>
</tbody>
</table>

If you enter “Department of Education” in the sponsor name field, the search will not yield any results because the sponsor name in the database is “Education, Dept-FED”.

6. **Project Start Date**: the proposed month, date and year in which the project will begin.
7. **Project End Date**: the date the project period will terminate.

**Sponsor & Program Information sub-tab**

1. **Sponsor Deadline Date**: The date the proposal is due to the sponsoring agency
2. **Sponsor Deadline Type**: The type of proposal deadline established by the sponsor.

**Organization/Location sub-tab**

**Primary Performance Site**- Finding a performance site location is very similar to finding a Sponsor Code. Click on the magnifying glass under the heading “Primary Performance Site”. This will take you to the Organization Lookup page.

In the Address field, enter either the name of the building, the name of the street or the number of the street address (e.g., for 651 Ilalo, enter “651”)

You may narrow the search by adding a space, then a room number. If you are searching for Rm. 301 in the JABSOM Medical Education Bldg, enter “651 301”.

![Organization Lookup](image)
If the performance site location is Biomedical Sciences Bldg, Rm. B201, you may enter “biomed b201” and your result should be:

Click “return value” and you will be returned to the Proposal tab, and the Primary Performance Site location will be populated.

If there are no errors, the message Document was successfully saved. will appear in the top left corner of the Proposal tab.

If there are errors, a message such as 10 error(s) found on page will appear. At the top of the sub-tab(s), you will be able to see the errors that must be fixed in order to save the document.

Each field that needs attention will be marked with an icon.

**KEY PERSONNEL TAB**

1. Adding a Principal Investigator is a required action prior to submission. To do so, click the search icon in the Add Key Person sub-tab and locate the person you would like to add by filling in the first and/or last name or username. Click return value.

2. Select a Proposal Role: Co-Investigator, Key Person, or Principal Investigator
Click “add person”.

3. If the person cannot be located, please request to add the person to the database by sending an email to helpline@ors.hawaii.edu. Please include the name of the person and any information you would like to be included. If this is a non-employee, be sure to include the organization the person is affiliated with.

4. On the tab with the PI’s (or Co-PI’s) name, click “show” to expand the tab. Click “show” next to the Unit Details heading and enter a unit number if one is not already listed. If you are adding a non-employee, please use unit code EX0001. Click .

5. Click “show” next to the heading UH Proposal Person Certification (Incomplete). Answer all questions on this tab and the status will change to “Complete”.

6. RTRF (Research and Training Revolving Fund) allocation—the combined total percentages for all PIs and Co-PIs listed must equal 100. This should reflect effort dedicated to the project. Unit percentages should total 100 per person.

ABSTRACTS AND ATTACHMENTS TAB

Proposal Attachments

1. Select attachment type- If this is an NSF or Grants.gov package, simply upload the entire package as a single attachment. When using type “Other” be sure to add a Description.
2. File Name – Select a file to upload
3. Click the button.

Internal Attachments

1. Attach the Request for Proposal or Request for Application here
2. Attach any document for a sponsor limitation on the F&A rate
3. If there are non-UH Co-PIs, attach commitment letters here.

Abstracts

Please copy and paste or type a brief Project Summary in the Abstract Details field.

If a document needs to be updated, click the “replace” button, click , then select the appropriate file and click the button.
**BUDGET VERSIONS TAB**

1. In the column titled *Name, enter a name for the budget (e.g., Budget 1), then click the add button.
2. Click the open button to open the budget document and you will be on the Parameters tab of the document.
3. If you’re doing a detailed budget, do not enter any amounts on the Parameters tab. Amounts entered on subsequent tabs (Personnel and Non-Personnel tabs) of the budget document will populate the fields on the Parameters tab.
4. The dollar amounts in this budget document should match the dollar amounts on the budget detail uploaded on the Abstracts and Attachments tab.

**Parameters tab**

1. Budget Overview sub-tab: enter cost limits if specified by the sponsor, and Comments if desired.
2. Budget Periods & Totals sub-tab
   a. If you’re doing a summary budget and have uploaded the budget details on the Abstracts and Attachments tab, enter:
      - Total Direct Cost
      - Total F&A Cost
      - Total Sponsor Cost
      - If applicable, cost sharing and unrecovered F&A amounts
   b. If you have amounts for cost sharing and unrecovered F&A, please go to the Distribution & Income tab.

**Distribution & Income tab**

1. If you have cost sharing, click “show” on the cost sharing tab
   a. In the Percentage column, enter 100 for each budget period.
   b. In the Source Account column, enter NA , Required by sponsor, or anything appropriate for each budget period.
   c. If not already populated, enter the amounts listed under the Cost Sharing Summary heading for each budget period.
2. If there is unrecovered F&A, click “show” on the Unrecovered F&A tab
   a. In the Source Account column enter NA or anything appropriate for each budget period.
   b. If not already populated, enter the amounts listed under the Unrecovered F&A Summary heading for each budget period.

**Budget Versions tab** - first check the box under Final?, then change the Budget Status to “Complete”.

**PERMISSIONS TAB**

You may want to add your Fiscal Administrator and Pre-Awards Specialist to the document as Viewers. Your assigned Pre-Awards Specialist may be located at:


1. Users sub-tab - click the search icon under *User Name and locate the person you would like to add by filling in the first and/or last name or username.
2. When the person is located, click “return value”. You will be returned to the Permissions tab and the user name field will be populated.

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3. **Full Name column** - you should see “not found”. You may ignore this.

4. **Role column** - assign a role you would like for the person to have, then click “add”.

### PROPOSAL ACTIONS TAB

1. **Data Validation sub-tab:**
   a. Click “show”, then “turn on validation”.
   b. Any existing errors will appear under Validation Errors.
   c. Clicking the “show” button next to the error will reveal details about the error.
   d. There will be a “fix” button at the end of the row. Clicking this will take you to the location of the error which needs to be corrected.
   e. If you are doing a system-to-system submission, there may also be errors listed under Grants.Gov Errors.

2. **Proposal Hierarchy sub-tab**: not used by myGRANT

3. **Print sub-tab**
   a. If this is a system-to-system submission, you will find forms listed that you may print
   b. You will not be able to print any document until all Grants.Gov errors are corrected.

4. **Copy to New Document sub-tab**
   a. If for any reason you need to make a copy of this document, you may do so on this tab
   b. Check the box next to Budget? if you would like to copy the budget
   c. Check the box next to Attachments? if you would like to copy the attachments
   d. Select your Lead Unit and click “copy proposal”

5. **Route Log sub-tab**
   a. Actions Taken
   b. Pending Action Requests – shows who currently needs to approve the document before it moves to the next level. Annotation column lists the role of the approver in the workflow.
   c. Future Action Requests – shows the path the document will take after the pending action requests are completed.

6. **Ad Hoc Recipients sub-tab**
   a. Click the search icon to perform a Person Lookup and click “return value” when the person is located.
   b. In the Actions column, click the add button.

### SUBMISSION

Once your proposal is complete and you have corrected the errors shown when you turn on Data Validation you are ready to submit the proposal for approval.

In the Proposal Actions Tab, click on the "submit" button

![Submit Button]

You may receive a pop-up box asking if you want to receive additional approval requests. Click "no" to avoid having to approve this proposal additional times in the approval process.

To follow the status in the approval process go to the Route Log in the Proposal Actions Tab.

For special circumstances and more complicated proposal scenarios you can always contact the ORS Helpline for further assistance.

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