

# ADDITIONAL FUNDING PROPOSAL ACTIVITIES

These instructions will provide basic how-to's for completing activities on the funding proposal. These are activities are not necessarily completed as part of the usual proposal development process but are helpful to be aware of and may be used in certain scenarios.

## Copy a Proposal

Proposals can be copied to use as a starting point for a new proposal. This is helpful when proposals have very similar information to another. It can also be used to copy a proposal in a terminal state (such as Not Funded).

On the proposal workspace, click the copy activity.

Pending Sponsor Review	Demo Proposal	FP00002251 Fun	ding Proposal	
Next Steps	Proposal Information		Budget Information	
View Funding Proposal	PD/PI:	Gilbert Ramsey (testpi10)	Starting Date:	9/1/2022
view runding rioposal	Department:	SPI-Sch Public & Intl Affairs	Number of Periods:	5
Printer Version	Specialist:	Angelina An	Total Direct:	\$270,816
	Sponsors:	University of Pittsburgh	Total Indirect:	\$171,460
Manage Ancillary Reviews	Internal Submission Deadline:	4/24/2023	Total:	\$442,276
Manage Relationships	Certified:	Yes	PeopleSoft Award ID:	
Manage Tags	SF424 Link:			
😰 Create Agreement	Draft	Specialist Review	Complete	
1 Add Attachments				
🔁 Сору	Clarification Requested	Clarification Requested Changes Required		
Export Budget to Subaward PDF				
A Send Grants Status Update	Budgets SF424 Summary History Re	viewers Attachments Financials H	Reviewer Notes Related Projects ···	

When presented with the following pop-up window, enter the proposal name. Select Use background processing. Click OK.

Cop	У					
Ihis	activity will copy this Funding Proposal.					
1.	* New proposal name:					
	New Proposal Copy					
This	activity takes time but can save you work! We	thank you for your pa	atience.			
					ок с	ancel

Navigate to the History tab. The link to your newly create proposal will appear. If you don't see it initially, its because the copying process is still running. Refresh the page and it will appear. The copied proposal will also appear in your Inbox in Draft state.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	•••	
Activit	y		Aut	hor		<b>~</b> A(	ctivity Date	
Copied			Che	ckovage, Michael J		7/22	/2020 5:38 PM	
New Copy: FP00000359								

Please note that Compliance Review information from the proposal and the proposal deadline date will not copy. The compliance review and proposal deadline date must be updated for every proposal to ensure accuracy. All SmartForm pages should be fully reviewed and updated as appropriate prior to submitting.

#### Print a Proposal

The proposal SmartForm can be printed for review or your records. This printed view also displays information that cannot be seen when the FP is in non-editable states.

To create a printer version, select the printer version button on the proposal workspace.

Draft	Demo Proposal f	FP00002225	Funding Proposal		
Next Steps					
Edit Eunding Proposal	<b>Proposal Information</b>		Budget Information		
	PD/PI:	Gilbert Ramsey (testpi10)	Starting Date:	7/1/2023	
Printer Version	Department:	SPI-Sch Public & Intl Affairs	Number of Periods:	5	
	Specialist:	Angelina An	Total Direct:	\$270,816	
<ul> <li>Submit For Department</li> </ul>	Sponsors:	American Health Assistance Foundation	Total Indirect:	\$172,323	
Review	Internal Submission Deadline:	8/25/2022	Total:	\$443,139	
<ul> <li>Withdraw Proposal</li> </ul>	Certified: Yes		PeopleSoft Award ID:		
Manage Ancillary Reviews	SF424 Link:				

The printer friendly version will be created in a new tab. Select Print. Choose your printer to print the document, or Adobe PDF to print to PDF, as normally performed on your local system.

#### Send Email

Emails can be sent from the proposal to other Baylor users. All emails will send a notification to the user with the email content. They are also tracked in the History tab.

Select the Send Email activity on the funding proposal workspace.

Draft	New Proposal Cop	V	FP0000035	59 Funding Proposal
Next Steps	1 1.	,		
Edit Funding Dranssel	Proposal Information		Budget Information	
Edit Funding Proposal	PD/PI:	Martha Gibbs (testpi9)	Starting Date:	9/7/2020
Printer Version	Department:	PNI-Princeton Neuro Institute	Number of Periods:	5
Printer version	Specialist:	Paula Looney	Total Direct:	\$0
Submit For Department	Sponsors:	Bill & Melinda Gates Foundation	Total Indirect:	\$0
Review	Internal Submission Deadline:		Total:	\$0
Withdraw Proposal	SF424 Link:		People Soft Award ID:	
Manage Ancillary Reviews		$\frown$		
Manage Relationships	Draft Department Review	Specialist Review	Awarded	
Manage Tags				
Create Agreement	Clarification Requested	Clarification Requested		
Add Attachments				
Сору	Budgets SF424 Summary History	Reviewers Attachments Financials	Reviewer Notes Related Projects Change I	Log
Create Additional Budget				
Export Budget	Working Budgets			
Send Email	Name	SmartForm	State Funding Source To	tal In Financials?
Manage Guest List	Bill & Melinda Gates Foundation	[Edit] • 7/16/2020 4:13 PM	Draft Foundation/Not For Profit \$0	yes
> Add Comment	1 items	∢ page 1 of 1		10 / page
Display Team COI Information				
Create-Update Cost Share				

In the Send Email window, enter the appropriate information. You can send the email notification to a subset of people working on the proposal, or search and send to a specific person. Once you have entered your information, click OK. Note that "All team members" includes the PI, the Specialist, the editors, and the readers.

en	i Email		
4	* Email authinat line:		
1	FYI- New proposal for chem	n research	
2	* Select at least one gr	roup of recipients:	
	All team members		
	All editors		
	All readers		
	Specialist		
	Select any other recin	ient for this email: (Only	aditors and readers have acce
		ione for the onitalit (only	
			10.000
	First Name	Last Name	E-Mail
	Supporting documents	will complete and submit by r	noay atternoon
	+ Add		
	Name		
	There are no items to disp	play	

The email notification will be received in Outlook email and logged on the History tab.

# Add and Revise Attachments

Select the Add Attachment activity.

Pending Sponsor Review	New Test							
Next Steps	<b>Proposal Information</b>							Е
View Funding Proposal	PD/PI:			Jason Aimone Test				S
view running rioposal	Department:			Economics				N
Printer Version	Specialist:			Lisa McKethan Tes	t			Т
	Sponsors:			National Aeronautio	cs and Space Admir	histration		Т
COI Disclosure Status	Internal Submission Deadlin	e:		1/9/2023				Т
	Certified:			No				
Send to COI	SF424 Link:							
Manage Ancillary Reviews	Funding Awards							
% Manage Relationships	ID	Name	State	Recipient	Sponsor			
Manage Tags	AWD0000039	New Test	Draft	Economics	National Aero	onautics and Space Adr	ministration	
Create Agreement	1 itoma					4 page 1 of 1		
1 Add Attachments	Titems					a page 1 of 1 P		
伦 Copy	Draft Draft	epartment Review	Specialist	Review	Sponsor Review	Complete	)	
A Send Grants Status Update								
A Send Email		Clarification	Clarific	ation	hanges Required	J		
La Manage Access		Requested	Reque	sted				
Add Comment	Budgets SF424 Summ	ary History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log
Funding Proposal	Working Budgets							

Click Add to Choose a File. Or drag and drop a file below the Add button.

Add Attachments		
1. Add attachments:	Submit a Document	Help
+ Add	Title:	
Name	If not provided, the name of the file will be used	
There are no items to display	* File: DRAFT-scientific-file.pdf Choose File Show Advanced Options	
	* Required OK OK and Add And	other Cancel

Click OK on the Submit a Document Screen. Confirm your document appears. Click OK on the Add Attachment screen.

Add Attachment		
1. Add attac	nments:	
Name		
ß	DRAFT-scientific-file.pdf(0.01) ····	
		OK Cancel

The document will now appear on the Attachment tab under the type "Attachments". The History tab will also record that a document was uploaded.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	
Туре	Name		Description Uplo	aded By	Date Created	Date Modified
Attachments	DRAFT-sc	cientific-file.pdf	Mich	ael Checkovage	7/30/2020 09:35 AM	17/30/2020 09:35 AM •••

If you need to revise an attachment, select the Add Attachments activity. Click the ellipsis and select Upload Revision.

dd Attachments		
1. Add attachments:		
+ Add Drag and drop files to upload		
Name		
DRAFT-scientific-file.pdf(0.01)		
	🛓 Download Copy	
	1 Upload Revision	լիդ
	O Delete	$\sim$

Choose the new file. Update the file title if necessary. It will retain the original title, so you may need to make updates such as removing the word "draft."

Add Attachments					<b>—</b> ×
1. Add attachments:	Submi	it a Document			😯 Help
+ Add	Title:	scientific-file.pdf			
Name		If not provided, the nar	ne of the file will be	used	
DRAFT-scientific-file.pdf(0.01)	* File:	scientific-file.pdf	Choose File		
		View			
	St	now Advanced Options			
	* Requir	red		OK OK and Add Another	Cancel

To see the history or review a previous version, select the ellipsis.

Resource H	Resource History for scientific-file.pdf									
Title: File: Owner: Author: Content Type Version: Description: <b>History:</b>	scientific-file.pdf scientific-file.pdf Michael Checkovage Michael Checkovage e: Document 0.02			5						
Compare	▼ Date	Version	Person	Action	Notes	Uploaded File				
	7/30/2020 9:37 AM	0.02	Michael Checkovage	File Uploaded & Edited		scientific-file.pdf				
	7/30/2020 9:35 AM	0.01	Michael Checkovage	Created		DRAFT-scientific-file.pdf				
			₫ ◀ 1-2	of 2 🕨 🕅						
Compare										
							ок			

Note that for the "Compare" feature to work, both files must be Word documents.

## Add a Comment

Comments can be added to the proposal. They are a helpful way to communicate with reviewers or notify others if you are using the multi-prong submission approach.

To add a comment, select the Add Comment activity

Draft	New Proposal	Example	FP00000351	Funding Proposal
Next Steps	_	-		
Edit Funding Proposal	Proposal Information		Budget Information	
	PD/PI:	Martha Gibbs (testpi9)	Starting Date:	7/27/2020
Printer Version	Department:	PNI-Princeton Neuro Institute	Number of Periods:	5
	Specialist:	Paula Looney	Total Direct:	\$0
Submit For Department	Sponsors:	NIH - National Institutes of Health	Total Indirect:	\$0
Review	Internal Submission Deadline:	7/20/2020	Total:	\$0
Withdraw Proposal	SF424 Link:		PeopleSoft Award ID:	
Manage Tags Create Agreement	Clar Rec	fication uested Clarification Requested	JIT Changes Required	
Add Attachments	Budgets SF424 Summary	History Reviewers Attachments	Financials Change Log …	
Р Сору				
Create Additional Budget	Activity	Author	✓ Activity Date	
Export Budget	Log Changed	Checkovage, Michael J	7/21/2020 4:19 PM	
Send Email	Log Changed	Looney, Paula M	7/21/2020 3:57 PM	
Manage Guest List				
O Add Comment				

In the Add Comment window, enter your comment and attach a document if desired.

Add Comment		
The comments or documents added below will be visible to all individuals that have a	ccess to read or edit this proposal.	
1. * Comments:		
Here's my comment about this proposal		
2. Attach documents: (Optional)		
+ Add		
Name		
電 Doc2.docx(0.01)		
		OK Cancel

The comment and document will be logged in the History tab.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	
Activity Author - Activity Date								
Comments Added Weber, Stacey A 8/23/2022 11:					8/23/2022 11:19 AN	I		
Here's my c	Here's my comment about this proposal							
Doc2.c	Doc2.docx							

# **Create Budget PDF**

A budget PDF can be created on the funding proposal to share with internal parties (such as the PI) or sponsors.

If there are multiple budgets, the PDF will show a summary budget and each individual budget. It will show a breakdown by sponsor budget and cost share budgets. The budget will also summarize and include any subaward budgets. Note that only sponsor budgets that are marked as "Include in Financials" on the Budget SmartForm will be included in the PDF.

To create the PDF, select the Generate Budget PDF activity.

Draft	Demo Proposa	l for 8/1 class	FP00002225 Fund	ling Proposal	
Next Steps					
Edit Funding Proposal	<b>Proposal Information</b>		Budget Informatio	n	
Latt analy roposal	PD/PI:	Gilbert Ramsey (testpi10)	Starting Date:	7/1/2023	
Printer Version	Department:	SPI-Sch Public & Intl Affairs	Number of Periods:	5	
	Specialist:	Angelina An	Total Direct:	\$270,816	
<ul> <li>Submit For Department</li> </ul>	Sponsors:	American Health Assistance Foundation	Total Indirect:	\$172,323	
Review	Internal Submission Deadline:	8/25/2022	Total:	\$443,139	
<ul> <li>Withdraw Proposal</li> </ul>	Certified:	Yes	PeopleSoft Award ID:		
Manage Ancillary Reviews	SF424 Link:				
% Manage Relationships	Praft Departmen	specialist Review	ansor Review	ete	
🏟 Manage Tags					
Create Agreement	Clarific	ation Clarification Chau	nges Required		
Add Attachments	Reque	Requested			
省 Сору					
Create Additional Budget	Budgets SF424 Summary	History Reviewers Attachments	Financials Reviewer Note	s	
Export Budget	Working Budgets				
Send Email	Name	SmartForm - Date Modified State Fi	unding Source Total	In Financials?	
Manage Access	American Health Assistance Found	dation [Edit] - 7/26/2022 10:23 AM Draft Fe	oundation/Not For Profit \$443,13	9 yes	
S Add Comment	1 items	spage 1 of 1 ▶		10 / page	
Display Team COI Information					
Create-Update Cost Share					
Commitment					

# Click OK to generate the PDF.

Generate Budget PDF		
Click OK to generate a PDF summary of the budget. Navigate to the history tab to view the summary.		
	OK	angel
		ancer

Navigate to the history tab to view the PDF.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	
4	Activity			Author			- Activ	ity Date	
B E Gen	Budget PDF Generated erateBudgetPDF_FP000	00309.pdf		Checkovag	ge, Michael J		7/22/20	20 6:46 PM	

Click the PDF and it will open in another tab.

		Baylor CARA Budg	Proposal et			
Proposal: Proposal Title: Sponsor: Prime Sponsor: Proposal PI: Proposal Department:	FP00000309 Molecular Bio Science Rese Abigail Doyle CHM-Chemist	Proposal arch Laboratory, ry	Inc.	Start D End D	Date: 10/1 ate: 10/1	2/2020 1/2025
BU00000587 - Scien	ice Research	Laborato	ry, Inc.			
Current All-Period Totals	Period 1	Period 2	Period 3	Period 4	Period 5	Cumulative
Personnel:	\$18,387	\$19,122	\$19,888	\$20,683	\$21,510	\$99,590
Salaries:	\$13,560	\$14,102	\$14,667	\$15,253	\$15,863	\$73,445
Benefits:	\$4,827	\$5,020	\$5,221	\$5,430	\$5,647	\$26,145
General:	\$20,000	\$20,800	\$21,632	\$22,497	\$23,397	\$108,326
Materials and Supplies	\$20,000	\$20,800	\$21,632	\$22,497	\$23,397	\$108,326
Total Direct:	\$38,387	\$39,922	\$41,520	\$43,180	\$44,907	\$207,916
Total F&A:	\$23,800	\$24,752	\$25,742	\$26,772	\$27,842	\$128,908
Project Total:	\$62,187	\$64,674	\$67,262	\$69,952	\$72,749	\$336,824
F&A Costs (Standard)	Period 1	Period 2	Period 3	Period 4	Period 5	Cumulative
Start Date:	10/12/2020	10/12/2021	10/12/2022	10/12/2023	10/12/2024	
End Date:	10/11/2021	10/11/2022	10/11/2023	10/11/2024	10/11/2025	
Indirect Cost Rate:	62%	62%	62%	62%	62%	
L	MTDC	MTDC	MTDC	MTDC	MTDC	
Indirect Cost Type:			644 500	\$43 180	\$44 907	
Indirect Cost Type: Indirect Cost Base:	\$38,387	\$39,922	\$41,520	\$40,100	Q44,001	

The PDF can be downloaded and printed as needed.

Please note that an Export Budget activity is also available. In general, using the Generate Budget PDF activity is advised.

# **Manage Access**

During proposal development, Editors and Readers are added to the Personnel SmartForm. The Manage Access activity allows you to add or remove FP editors or change the admin contact when the proposal is in any state, including non-editable states.

1	Send En	nail	Click on					
<u>.</u> .	Manage	Access	Manage Access					
$\mathcal{O}$	Add Cor	nment	Access					
i Execut	te "Manage Access"	on FP00002221 —	Mozilla Firefox				- 0	×
OA	https://mpclkpuj	prev.huronclick.c	om/Grants/sd/ResourceAdr	ninistration/Ac	ctivity/form?ActivityType=com.webrid	ge.entity.E	ntity[OID[1FB124ACB580BC4C8FE 🏠	≡
Manag	e Access							
s 2. s	elect team r	members w	ho have edit rights	(we	add or remove editors he generally don't use the r functionality).	ere reader		
	Last Name	First Name	Employer Name		Title			
-	Furda	Katharine	SPI-Sch Public & In	tl Affairs	Financial Reporting Analyst		8	
	Seamans	Jonathan	SPI-Sch Public & In	tl Affairs	Finance & Budget Director		3	
	Weber	Stacey	SPI-Sch Public & In	tl Affairs	Finance Manager		8	
<u>3.</u> S	elect team r	nembers w	ho have read-only	rights:				
	Last Name		First Name	Employ	yer Name	Title		
	There are no	items to displ	ay					
							OK Can	cel

### **Recall Proposal**

Administrative contacts and proposal editors can recall the proposal if needed. Recalling the proposal will move it back to a Draft state where it can be edited and updated.

The recall activity can only be used during the Department Review and Specialist Review stages. Once the proposal is in Pending Submission to Sponsor state or has been submitted to the sponsor, it cannot be recalled.

To recall a proposal, select the Recall Funding Proposal activity on the proposal workspace.

Department Review	Demo Proposa	al for 8/	4 clas	SS			FP00002229	Fundir	ng Proposal
Next Steps	-								
View Funding Proposal	Proposal Information					Budge	t Information		
view running rieposa	PD/PI:		Gilbert Ramsey	(testpi10)		Starting	Date:		7/1/2023
Printer Version	Department:		SPI-Sch Public	& Intl Affairs		Number	of Periods:		5
	Specialist:		Angelina An			Total Dir	rect:		\$270,816
Manage Ancillary Reviews	Sponsors:		American Heal	th Assistance Found	ation	Total Ind	lirect:		\$172,323
S Manage Relationships	Internal Submission Deadline:		8/25/2022			Total:			\$443,139
	Certified:		Yes			PeopleS	oft Award ID:		
Manage lags	SF424 Link:								
Create Agreement		and Barrison	Constaliat D		Berlin	Complete			
📩 Add Attachments	Draft	tent Review	Specialist R	eview 3	ponsor Review	Complete			
🔁 Сору	Clari	fication	Clarificat						
🛃 Send Email	Req	juested	Request	ed Ch	anges Required 🗲				
Access									
Add Comment	Budgets SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects		
Recall Funding Proposal	Working Budgets								
Display Team COI Information	Name		SmartForm	▼ Date Modified	State	Funding Source	Total	In	Financials?
Create-Update Cost Share Commitment	American Health Assistance Fo	oundation	[Edit] 🕶	8/5/2022 3:28 PM	Under Review	Foundation/Not Fo	or Profit \$443,	139 yes	\$
Generate Budget PDF	1 items			<pre>ø page 1</pre>	of 1 🕨				10 / page

In the Recall Funding Proposal window, enter the reason you are recalling. This is a mandatory field. Click OK.

😻 Execute "Recall Funding Proposal" on FP00002229 — Mozilla Firefox —		×
O A https://mpclkpuprev.huronclick.com/Grants/sd/ResourceAdministration/Activity/form?ActivityType=com.webridge.entity.Entity[OID[ 90%	5	≡
Recall Funding Proposal		
When you select OK below, the Funding Proposal will be moved back into your inbox for re-submission. You can make any desired edits, ar for department review.	d re-su	ıbmit
1. * Reason for recall:		
Need to update budget.		
ок	Canc	æl

The proposal will now be in Draft state and can be edited. The Recall information will appear on the History tab.

Draft	Demo Proposal f	or 8/4 class	FP00002229	Funding Proposal
Next Steps	1			
Edit Funding Proposal	<b>Proposal Information</b>		<b>Budget Information</b>	
Luit i unung i roposai	PD/PI:	Gilbert Ramsey (testpi10)	Starting Date:	7/1/2023
Printer Version	Department:	SPI-Sch Public & Intl Affairs	Number of Periods:	5
	Specialist:	Angelina An	Total Direct:	\$270,816
A Submit For Department	Sponsors:	American Health Assistance Foundation	Total Indirect:	\$172,323
Review	Internal Submission Deadline:	8/25/2022	Total:	\$443,139
	Certified:	Yes	PeopleSoft Award ID:	
Manage Ancillary Reviews	SF424 Link:			
% Manage Relationships	Draft Department Rev	view	Complete	
🏟 Manage Tags				
Create Agreement	Clarification	Clarification Changes Required		
1 Add Attachments	Requested	Requested		
🔁 Сору	Budgete SE424 Summary U	story Baviaware Attachmente Financiale	Reviewer Notes Related Projects	
Create Additional Budget	Dudgets St 424 Summary III	Story Reviewers Attachments I mancials	neviewei notes netateu i tojects	
Export Budget	Activity	Author	✓ Activity Date	
A Send Email	← Recalled	Weber, Stacey A	8/23/2022 11:30	AM
•• Managa Access	Need to update budget.			

The proposal can now be updated and re-submitted for Department Review.

A notification will not be sent to individuals who have already reviewed the proposal, but as a professional courtesy you could use the Send Email activity to let the current reviewers know that you will be recalling the proposal in case they are actively reviewing the proposal.

# Withdraw Proposals for Proposals that Won't Be Submitted

The proposal administrative contact and editors can update a funding proposal that is being withdrawn from consideration for funding or will not be submitted. This activity is used for proposals that are "abandoned" meaning they were started in Princeton ERA and will never be submitted to the sponsor. There is no way to delete a proposal from Baylor CARA, but using the Withdraw Proposal activity will put the proposal into the "Not Submitted" state.

Department administrators can withdraw the proposal when it is an editable state for them – in Draft, Department Review: Response Pending from PI, or Specialist Review: Pending Changes by PI. If the proposal is with the ORPA specialist, please contact them to withdraw the proposal.

To withdraw a proposal, select the Withdraw Proposal activity on the funding proposal workspace.

Draft	Demo Proposal f	or 8/4 class	FP00002229	Funding Proposal
Next Steps				
Edit Funding Proposal	Proposal Information		Budget Information	
	PD/PI:	Gilbert Ramsey (testpi10)	Starting Date:	7/1/2023
Printer Version	Department:	SPI-Sch Public & Intl Affairs	Number of Periods:	5
	Specialist:	Angelina An	Total Direct:	\$270,816
Submit For Department	Sponsors:	American Health Assistance Foundation	Total Indirect:	\$172,323
Review	Internal Submission Deadline:	8/25/2022	Total:	\$443,139
← Withdraw Proposal	Certified:	Yes	PeopleSoft Award ID:	
Manage Ancillary Reviews	SF424 Link:			
% Manage Relationships	Draft Department Ret	view Specialist Review Sponsor Review	Complete	
Manage Tags				
Create Agreement	Clarification	Clarification Changes Required		
Add Attachments	Requested	Kequested		

In the Withdraw Proposal window, enter the reason for withdrawal. This is a mandatory field. Click OK.

Withdraw Proposal
When you select OK below, the Funding Proposal will be withdrawn from consideration for submission. If you do not wish to withdraw this submission, click Cancel. Please provide a brief explanation for the withdrawal.
1. * Reason for withdrawal:
PI decided not to submit.
OK Cancel

The proposal is now in a Not Submitted state and the withdrawal is logged in the History tab.

Not Submitted	Demo	o Proposa		FP00002229	Fundir	ng Proposal				
Next Steps										
View Funding Proposal	Proposal	Information				Budg	Budget Information			
3	PD/PI:			Gilbert Ramse	ey (testpi10)	Startin	Starting Date:		7/1/2023	
Printer Version	Department:		SPI-Sch Publi	SPI-Sch Public & Intl Affairs			Number of Periods:			
Specialist:				Angelina An				lirect:		\$270,816
Manage Relationships	Sponsors: An			American Hea	American Health Assistance Foundation			Total Indirect:		
**	Internal Submission Deadline:			8/25/2022			Total:	Total:		
Manage lags	Certified:			Yes			People	PeopleSoft Award ID:		
Create Agreement	SF424 Link:									
1 Add Attachments										
Сору		1					1			
Send Email	Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects		
La Manage Access	Activ	ity		Author				✓ Activity Date		
O Add Comment	+ Propo	sal Withdrawn		Weber, Stacey A				8/23/2022 11:32 AM		
Display Team COI Information	+ Recal	led			Weber, St	acey A		8/23/2022 11:30 A	M	
G Create-Undate Cost Share	Need to upd	ate budget.								

# **Create Agreement**

If you are creating an agreement that is related to a funding proposal, you can create the agreement directly from the funding proposal which will link the records.

Select the Create Agreement activity on the funding proposal workspace.

Draft	Demo Proposal for 8	3/1 class	FP00002225 Funding Proposal
Next Steps			
Edit Funding Proposal	Proposal Information		Budget Information
Luit i unuing i reposta	PD/PI:	Gilbert Ramsey (testpi10)	Starting Date: 7/1/2023
Printer Version	Department:	SPI-Sch Public & Intl Affairs	Number of Periods: 5
	Specialist:	Angelina An	Total Direct: \$270,816
Submit For Department	Sponsors:	American Health Assistance Foundation	Total Indirect: \$172,323
Review	Internal Submission Deadline:	8/25/2022	Total: \$443,139
← Withdraw Proposal	Certified:	Yes	PeopleSoft Award ID:
Manage Ancillary Reviews	SF424 Link:		
% Manage Relationships	Draft Department Review	Specialist Review	Complete
Manage Tags			
Create Agreement	Clarification	Clarification Changes Required	
1 Add Attachments	Requested	nequested	
Copy			
Create Additional Budget	Budgets SF424 Summary History	Reviewers Attachments Financials Reviewe	T NOTES RELATED PTOJECTS

In the Create Agreement window, select the Agreement Type from the drop down and click OK.

Create	An	reen	nent
Greate	Ay	reer	nent

This activity will submit a request for a new Agreement to be created. Once this Agreement is created, it will be associated with this Funding P The newly created Agreement can be found under the Related Projects tab of the Funding Proposal workspace.	roposal.
*Select an Agreement Type to create: Master Research Agreement	
ОК	Cancel

The Agreement has been created. Select the Related Projects tab to view the agreement.

Budgets	SF424 Summary	History	Reviewers	Attachm	ients Financia	als Rev	riewer Notes	Related Projects		
Related Pro	jects									
Filter by 😧	ID	Enter text	t to search		<b>Q</b> + A	<b>Id Filter X</b> Clea	ar All			\$
ID	Name			Owner	Organization		Project Type	Project Status	Modified Date	
MRA0000029	Agreement for: D	emo Proposal f	or 8/1 class		SPI-Sch Public & Ir	tl Affairs	Agreement	Pre-Submission	8/23/2022 11:34	AM

Clicking the ID or Name will take you directly to the new agreement. For more information on agreement setup, refer to the Agreement Manual.

## **Manage Relationships**

Funding proposals can be linked to related agreements from the funding proposal workspace. Note that they can also be linked from the Agreement workspace.

To link a funding proposal to an agreement, select the Manage Relationships activity on the workspace.

Draft	Demo Proposal f	or 8/1 class	FP00002225 Fundi	ng Proposal		
Next Steps	-					
Edit Funding Proposal	Proposal Information	Proposal Information				
	PD/PI:	Gilbert Ramsey (testpi10)	Starting Date:	7/1/2023		
Printer Version	Department:	SPI-Sch Public & Intl Affairs	Number of Periods:	5		
	Specialist:	Angelina An	Total Direct:	\$270,816		
Submit For Department	Sponsors:	American Health Assistance Foundation	Total Indirect:	\$172,323		
Review	Internal Submission Deadline:	8/25/2022	Total:	\$443,139		
	Certified:	Yes	PeopleSoft Award ID:			
Manage Ancillary Reviews	SF424 Link:					
Son Manage Relationships	Draft Department Rev	view	Complete			
Manage Tags						
Create Agreement	Clarification	Clarification Changes Require	d) a			
1 Add Attachments	Requested	Kequested				

Search and select the desired agreement. Click OK.

ſ	%kyle							
	ID	Name	Organization	Project Type				
	OTH00000193	Kyle trying new agreement 7/12/22	SPI-Sch Public & Intl Affairs	Agreement		Project Status	Modified Date	
	DSP0000031	Kyle DSP	DFR-Ofc Res & Proj Admin	Agreement		Dro	8/23/2022 11-24	
	DSP0000030	Kyle DSP 7/19	DFR-Ofc Res & Proj Admin	Agreement	nt	Submission	AM	1
	NDA0000039	Kyle NDA	DFR-Ofc Res & Proj Admin	Agreement				
C	OTH00000196	Kyle new agmt 1 more time 7/19/22	SPI-Sch Public & Intl Affairs	Agreement				
	OTH00000197	Kyle Sample Agreement 7/21	SPI-Sch Public & Intl Affairs	Agreement				
	OTH00000198	Kyle Sample Agreement B 7/21/2022	SPI-Sch Public & Intl Affairs	Agreement				
	OTH00000199	Kyle Sample Agreement C 7/21/2022	SPI-Sch Public & Intl Affairs	Agreement				
	REQ00000451	Kyle trying one more thing 7/19/2022	DFR-Ofc Res & Proj Admin	Agreement				
			11.					

The agreement is now linked. Navigate to the Related Projects tab on the workspace to confirm or to navigate to the agreement.

Budgets	SF424 Summary	History	Reviewers	Attachme	nts Financials	Reviewer Notes	Related Projects		
Related Pro	jects								
Filter by 🔞	Filter by 😧 ID 🔹 Enter text to search Q + Add Filter X Clear All							\$	
ID	Name			Owner	Organization	Project Type	Project Status	Modifie	d Date
MRA0000029	Agreement for: De	mo Proposal fo	or 8/1 class		SPI-Sch Public & Intl A	ffairs Agreement	Pre-Submission	8/23/202	22 11:34 AM
OTH00000197	Kyle Sample Agre	ement 7/21		Lynn Crow	SPI-Sch Public & Intl A	ffairs Agreement	Active	7/21/202	22 2:29 PM