
Creating a Proposal - multiple PIs/Projects

The UF Express Proposal Page allows you to quickly create a grant proposal in myUFL and is based on the Sponsored Projects Approval Form, known as the DSR-1.

The UF Express Proposal Page collects key information for a more streamlined set up of a proposal and its project(s) in the myUFL Grants system.

As long as a proposal has not been submitted into workflow, it can be modified. In this example, we will add an additional project to a saved draft proposal that already has one project. The final submitted proposal will contain two projects with multiple PIs (Principal Investigators).

Take class **PST960 PreAward: Grant Proposals 9.1** for a detailed explanation of this process.

Navigation

1. Click the **Main Menu** button.
2. Click the **Grants** menu.
3. Click the **Proposals** menu.
4. Click the **Maintain Proposal** menu.
5. Enter the Proposal ID of the proposal to which you will add an additional project into the **Proposal ID** field on the **Find an Existing Value** tab.
6. Click the **Search** button.

Proposal Project

7. In the Proposal Project section, clicking the **Add a new row** button will allow you to add an additional project to this draft proposal.
8. Notice in the new Project, the **Title** and the **Contact** information clears in preparation for new Project information.
Note: The **Department, Subdivision** and **Institution** information remains from the previous Project. Change as needed.
Note: If a *new* department will be entered as part of the additional project, confirm the Institution and Subdivision fields update after adding the new Department ID. If you press the **[Enter]** key after entering the new department, the system will display a confirmation window automatically updating the Institution and Subdivision fields. Otherwise, you will have to update them manually.
9. Also notice the **Primary** checkbox has also cleared as the proposal only can have one Primary project. Be sure at least one project has been marked as Primary.
Note: All necessary projects must be added to the proposal before you can submit it into workflow. Once you have clicked the **Start Approval Process** button, no additional projects can be added unless the proposal is denied and returned to draft mode by an approver.
10. Enter the UFID of a departmental contact for this project or use the lookup to search by name, UFID or Department.
Note: This person will receive automatically generated emails indicating the occurrence of financial transactions, such as budget releases and transfers.

Professional

11. Click the **Add a new row** button to add any additional professionals who will be working on this project. Any additional investigators will be added as Co-PIs as each project can only have one indicated PI.
Note: PIs must be workflow eligible to be added to the project. Workflow eligible means they have been previously approved to serve in the designated role. If you attempt to add someone who is not workflow eligible, you will receive a message stating they are not eligible and you will not be able to add them to the project.
Note: To indicate someone as workflow eligible, send an e-mail to ufproposals@ufl.edu with the names of those who are approved to serve as a PI.

FA Allocation

12. Click the **FA Allocation** link is used to enter Facilities and Administrative (a.k.a. F&A, Indirect or Overhead) funds that will be shared with professionals, departments and centers affiliated with this project.
Note: This link will only be active if MAIN was selected as the Institution. IFAS and EIES distribute F&A differently and cannot access this link.
13. Enter the percentage of F&A funding to be shared with each professional into the **%** field.
Note: Amount of percentage should not exceed a total of 10% for all professionals working on the project.
14. Enter the EmplID of the professional(s) into the **EmplID** field.
Note: You can enter the full **EmplID** of the professional working on this project; enter a portion of the EmplID and choose from the Type Ahead list or click lookup to search for the desired EmplID number.
15. Enter the professional's associated department into the **Dept** field.
16. Click the **Add a new row button** and repeat steps 13–15 for each additional professional.
17. Enter the desired departmental percentage into the **%** field in the Departments section.
Note: Amount of percentage should not exceed a total of 7.5% for all departments involved in the project.
18. Enter the department ID into the **Dept** field.
19. Click the **Add a new row button** and repeat steps 17-18 for each additional department.
20. If a center is involved in the project, enter the desired center percentage into the **%** field in the Center section.
Note: Amount of percentage should not exceed a total of 7.5% for all departments involved in the project.
21. Enter the center ID into the **Center** field.
22. Click the **Add a new row button** and repeat steps 20-21 for each additional center.
23. Click the **OK** button to return to the UF Express Proposal page tab.
24. Click the **Primary PI** option for the PI who will serve as the primary.

Certification

Use the Certification section to enter information on any needed project certifications.

25. Select each Indicator field to indicate whether a certification is required.

Note: Each Indicator field must include a value other than N/A.

Indicator options include:

(Yes) if **required**

(No) if **not required**

(Pending) if **pending review**

(Closed)

Note: If you choose **Yes** anywhere under the Indicator column you must give either an assurance number and expiration date or an exemption number in order to create the proposal.

Note: If you do not currently possess all needed assurance or exemption numbers, select **Pending** from dropdown list.

Note: If the actual approval date is known, enter into the **Approval Date** field. Otherwise, leave this field blank. If left blank, myUFL will automatically input in the current date when the proposal is saved.

Note:

- For animal/human certifications set to "Yes", the date of approval from IACUC or IRB must be included in the Approval Date field. If set to "Pending", an approval date is not required at this point.
- For human certifications set to "Yes", CLSVC certification is required for the Health Science Center only. When this certification is set to Yes, in lieu of a true exemption number you can input "N/A".
- For conflict of interest certifications, enter the faculty member's UFID in the Exemption Number field (required by some colleges)
- The University still requires signed conflict of interest forms for any indicated conflicts. You can access and print this form from UF's COI policy link provided in the Proposals Projects section above. Once completed, the form can be scanned and uploaded to the proposal after completing the Express Proposal Page by using the Key Words/Documents tab.

If additional certifications are required:

- a. Click the **plus-sign** to add a new row for the additional certification, if needed.
- b. Click the **Look up Certification Code** button.
- c. Click the **Look Up** button.
- d. Find and select the desired certification.
- e. Click the **Indicator** dropdown field.
- f. Click the **Yes** list item.

Document Attachments

Any number or format of document can be attached to the proposal.

26. If needed, click the **Add Attachment** button to add attachments.
27. Click the **Browse...** button.
28. Locate and select the desired file and then click **Open** to attach to the proposal.
29. Click the **Upload** button.

Professional

30. Notice the Professional section now displays with multiple records.

These entries represent PIs, Co-PIs, Chairs and any other professionals indicated from the Other Role field.

Start Approval Process

Once the proposal is completed with all needed projects and PIs and has been saved. This final step is to submit the proposal for approval.

31. Click the **Start Approval Process** button.
Note: Once the proposal has been submitted into the approval workflow, no editions can be made to the Professional section. All other areas of the proposal (i.e., budget information, titles, dates, etc.) remain open and editable.
32. Click the **Yes** button.

Proposal Approval History

The Proposal Approval History page will show the current approval status of each project in the submitted proposal.

33. Click the **Proposal Approval History** link.

Approval Levels:

PI > Chair > Dean > DSR

Any person designated as "eligible" within an approval level will appear in the Component Approval History section until the approval is obtained. Then only those who have approved the project will appear here.

Approval Statuses:

Draft = the condition of the proposal as its being created and after being saved, but prior to being submitted into workflow for approval.

Pending Approval = once the Start Approval Process button has been clicked and the proposal is submitted into workflow, but prior to DSR approving the proposal.

Institution Approved = the status once DSR approves the proposal and sends it to the sponsor.

Awarded = the status once C&G receives the NOA and generates the award in myUFL.

34. Click the **OK** button to return to the UF Express Proposal tab.

Budgets Tab

If the budget detail information is known at the time of creating the proposal projects, that information can be entered through the **Budgets** tab. Otherwise, budget information can be added at a later date through the Budget Details page which can be access via Main Menu > Grants > Proposals > Enter Budget Detail.

See the **Entering Budgets Information** instruction guide for more details on entering budget information.

35. Click the **Save** button.

If you need help with...

--Technical issues, contact the UF Help Desk at 392-HELP or helpdesk@ufl.edu.

--Grant proposal policies or procedures, contact the Division of Sponsored Research, Processing and PreAward Services office, 392-9267 or ufproposals@ufl.edu.

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