

[UF Start Proposal Page]

Use the UF Start Proposal Page to create a grant proposal in myUFL. The Start Proposal Page is the first step in the grant proposal creation process. The Start Page collects key information for the set up of the proposal and its project(s).

- ▶ Log into the system via the myUFL portal, using your GatorLink user ID and password (<http://my.ufl.edu>)
- ▶ Navigate to Grants > Proposals > UF Start Proposal
- ▶ Click the "Add New Proposal" button

Complete the following fields in the *Proposal Header Information* Section

- ▶ Due Date: Identify date proposal is due by typing in field or using calendar feature
- ▶ Date Type: Use drop-down menu to identify the type of deadline
The Date Type field includes the following options:
 - ▶ Internal – Indicates a deadline set within the university; does not need to be sent to an agency. Use also if proposal has already been approved via DSR1
 - ▶ Postmark – Proposal must be postmarked by date indicated
 - ▶ Receipt – Proposal needs to be received by the sponsoring agency by this date
 - ▶ Target – Indicates a preferred (but not an absolute) deadline to get proposal to agency
- ▶ PI: Enter employee ID of Principal Investigator by typing in field or using lookup
- ▶ Short Title: Field is free text; limit 56 characters
- ▶ Long Title: Field is free text
- ▶ Sponsor: Use lookup to identify sponsoring agency
Note: if you cannot find sponsoring agency, contact the Division of Sponsored Research (ufproposals@rgp.ufl.edu) to look up agency or, if necessary, add to list of sponsors
- ▶ Type: Use drop-down menu to identify type of proposal (new, competing continuation, etc.)
Note: Non-competing continuations should be entered under the awards menu (Grants>Award>Create Continuation)
- ▶ Purpose: Use lookup to identify purpose of work (research, instruction, etc.)
- ▶ From and To: Identify dates work will begin and end by typing in field or using calendar feature

Fill in the following sections only as they apply to your proposal

- ▶ Solicitation Information: If the proposal is the result of a RFP (Request for Proposal) enter appropriate information in this section
- ▶ Previous Award: If the proposal is related to a previous award (e.g., supplemental, competing continuation, or renewal), enter appropriate information in this section



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- ▶ Related Proposal: If a pre-proposal was submitted, this is a resubmission, or several proposals are being submitted jointly to the sponsoring agency, enter appropriate information in this section
- ▶ Cost Sharing: Though not required, cost sharing information can be entered in this section
Note: More detailed cost sharing information can be entered in the Budget Line Summary for a project after the proposal is created
- ▶ Additional Comments: Use this field to add additional information

Complete the Mailing Information section (the following fields are required)

- ▶ Transmission Code: Use the lookup to choose the abbreviation for the delivery method (such as electronic, overnight, by mail, etc.)
- ▶ Type in mailing information such as Fed Ex#, number of copies, and mailing address

Complete the following fields related to the project(s) for the proposal in the Project section

Note: The proposal saves the administrative information while the project stores monetary information and project specific information, such as resources or subrecipients. A proposal can have multiple projects

- ▶ Institution ID: Identify whether project is managed out of IFAS, Engineering, or Main Campus
- ▶ Primary check box: Every proposal has one primary project. Check if this is the primary project
- ▶ Department: Type in Department ID or use lookup to identify the department out of which the project will be managed
- ▶ Department Contact: If there is a department contact person, enter that person's employee ID here by typing it in or using the lookup
- ▶ College (subdivision): Populates automatically based on Department given above
- ▶ Project Title: Type in the title of the project
- ▶ Use the Exclude check box only to delete a project – cannot use for primary project

Enter information for all Professionals working on the project

- ▶ Information for the PI listed in Proposal Header defaults on first line
- ▶ To add a professional, click the plus-sign button
- ▶ Add information for other professionals
 - ▶ ID: Use lookup to find Employee ID or type directly in field
 - ▶ Department ID: Use lookup to identify employee's department
 - ▶ Role: Specify the person's project specific role (PI, Co-PI, Key Personnel, etc.)
Note: Faculty outside of your dept/college must have a role of PI or Co-PI in order to approve using myUFL workflow

Enter information related to project Certifications

- ▶ For each of the certifications listed, identify whether the certification is required. If a certification is required, choose "yes"; if not, choose "no." If a review is pending, choose "pending"
 - ▶ If you choose "yes" under indicator, you must give an assurance number and expiration date or an exemption number in order to create the proposal
 - ▶ Note: For conflict of interest certifications, enter the faculty member's employee ID in the exemption number field (required by some colleges)
 - ▶ Note: The University still requires signed conflict of interest forms. These can be scanned and uploaded to the proposal after completing the Start Proposal Page by using the Documents tab of the delivered proposal pages (Grants>Proposals>Proposal)
- ▶ To add another certification click the plus-sign button

- ▶ Use the Certification Code lookup to select type of certification. Do not duplicate certification codes. Multiple Conflict of Interest certifications, for example, should be COI1, COI2, etc.

If Facilities and Administrative (F&A) funds will be allocated to professionals, departments, or centers enter that information under F&A Allocation section

Note: this section will only display if MAIN was selected above as the institution. IFAS and EIES distribute F&A differently and do not use (or even see) this section

- ▶ Professionals
 - ▶ %: Enter percent of F&A to be allocated to the professional
 - ▶ EmplID: Enter professional's employee ID
 - ▶ DeptID: Enter professional's department
- ▶ Departments
 - ▶ %: Enter percent of F&A to be allocated to the department
 - ▶ DeptID: Type in Department ID or use lookup
- ▶ Center
 - ▶ %: Enter percent of F&A to be allocated to the center
 - ▶ DeptID: Type in center ID or use lookup
- ▶ Use the plus-sign button to add professionals, departments, or centers
- ▶ Note: The percentages *for each section* cannot exceed those noted (Professionals – 10%, Departments – 7.5%, Centers – 7.5%)

Complete all fields in the Budget Period Info section

- ▶ Begin Date and End Date: These fields should default from Proposal Header information
 - ▶ To add or adjust budget periods use plus-sign button and minus-sign button and enter Begin and End Dates for each period
Note: Budget periods cannot overlap and must run consecutively. These dates must also remain consistent with the From and To dates entered at the top of the page
- ▶ Target Sponsor Budget: Enter total amount being requested from sponsor
Please Note: If there are multiple projects and/or multiple budget periods, enter amount being requested *per budget period*

Complete all fields in Facility and Admin Set Up section

- ▶ Rate Type: Use lookup to choose type of F&A Rate, such as On-Campus Research, Off-Campus Research, etc.
- ▶ FA Base: Use lookup to choose base for calculating F&A
- ▶ Rate Effective Date and Facilities Admin Rate Per: These fields default based on the selections for Rate Type and FA Base and the university's federally negotiated rates. If the sponsoring agency's rate is different, change the current Facilities Admin Rate Per to the correct percentage. Leave the Rate Effective Dates "as is"
- ▶ To add a project, click the arrow next to Project 2 and, if appropriate, Project 3 to enter required information for additional projects
Note: You can add up to three projects on the Start Proposal Page. Any additional projects need to be added on the proposal page tabs (Grants>Proposals>Proposal) after you have finished the Start Proposal Page and created the proposal
- ▶ Click the "Create Proposal and Budget Header" button
- ▶ Write down the system assigned Proposal ID and Project ID numbers

Notes

- ▶ You must finish the Start Page and create the proposal in one sitting. There is no way to save information and return later. Before beginning the UF Start Proposal process, you will want to know the Total Budget and F&A Rate being requested for the proposal
- ▶ The UF Start Proposal Page is the first step in the grant proposal creation process. The information entered on this page populates the proposal page tabs (Grants>Proposals>Proposal) after the proposal is created and can be edited or updated there
- ▶ After creating a proposal on the Start Page, you can build the budget using the Budget Line Summary. Please view the instruction guide on Budget Line Summary

If you need help with...

- ▶ Technical questions or issues, contact the UF Help Desk at 392-HELP or helpdesk@ufl.edu.
- ▶ Grant proposal policies and procedures, contact the Division of Sponsored Research at 392-9267 or ufproposals@rgp.ufl.edu.