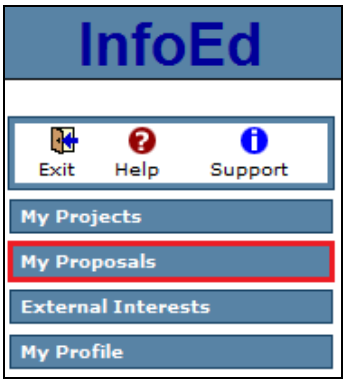
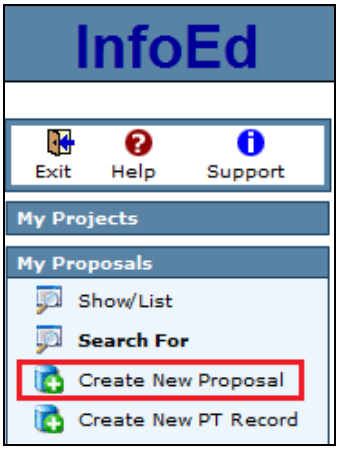
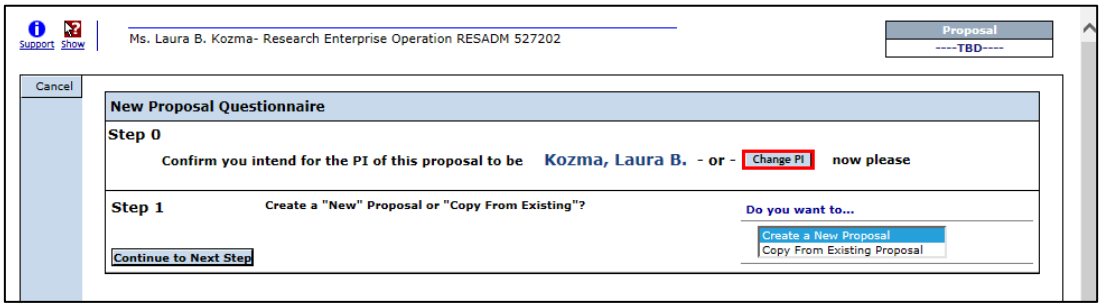
This quick guide highlights the process for initiating a proposal for an *S2S* proposal for submission to Grants.gov in **IRES Proposal Development (PD)**.

1	Log into **IRES** and click the **My Proposals** tab. 
2	Click **Create New Proposal**. 

3

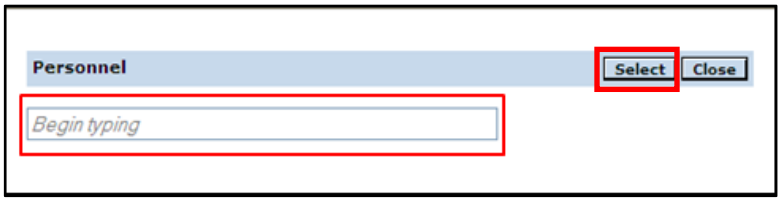
The **Create New Proposal** window will display. Complete the **New Proposal Questionnaire**.

Step #0: Click the **Change PI** button.



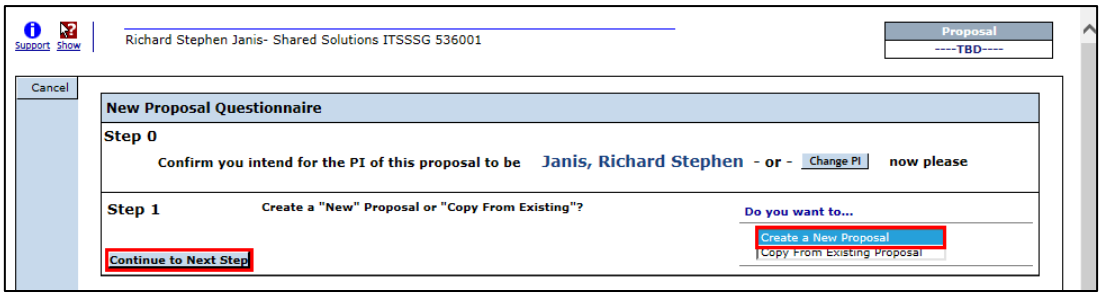
The **Personnel** window will display.

1. Enter the Principal Investigator's (PI) name in the **Progressive Search** field.
2. Locate and click the name of the person in the search results list.
3. Click **Select**.



The PI's name will display in **Step #0**.

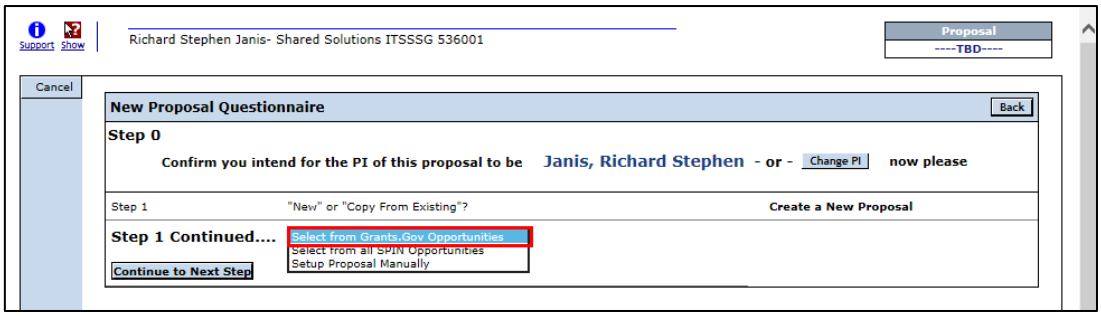
Step #1: Confirm that the system defaults to **Create a New Proposal**, and click **Continue to Next Step**.



4

Step #1 Continued: Use the drop down menu to choose the **Select from Grants.gov Opportunities**.

Click **Continue to Next Step**.
Note: Clicking the "Back" button will allow you to return to the previous step.



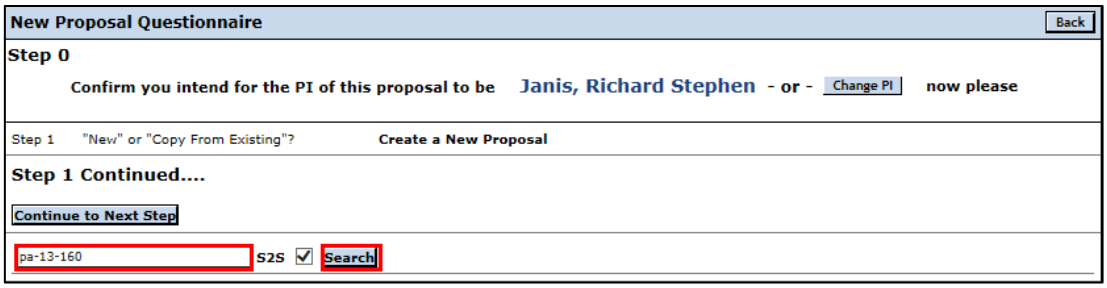
The following options are available in the **Step 1 Continued** drop down menu:

1. **Select from Grants.gov Opportunities:** *This option includes opportunities in the SPIN and Grants.gov database that are electronic proposal submissions only.*

2. **Setup Proposal Manually:** *This option will route users to Step 2, and allows users to manually set up a proposal record without an assigned opportunity. Refer to* ***Initiating a Proposal Non-S2S*** *for instructions about how to initiate a proposal which will not be submitted system to system.*

5

If you choose the **Select from Grants.gov Opportunities** option, enter the **Funding Opportunity Number** in the search field and click **Search.** If you do not have the **Funding Opportunity Number**, you may also search by keyword or sponsor.



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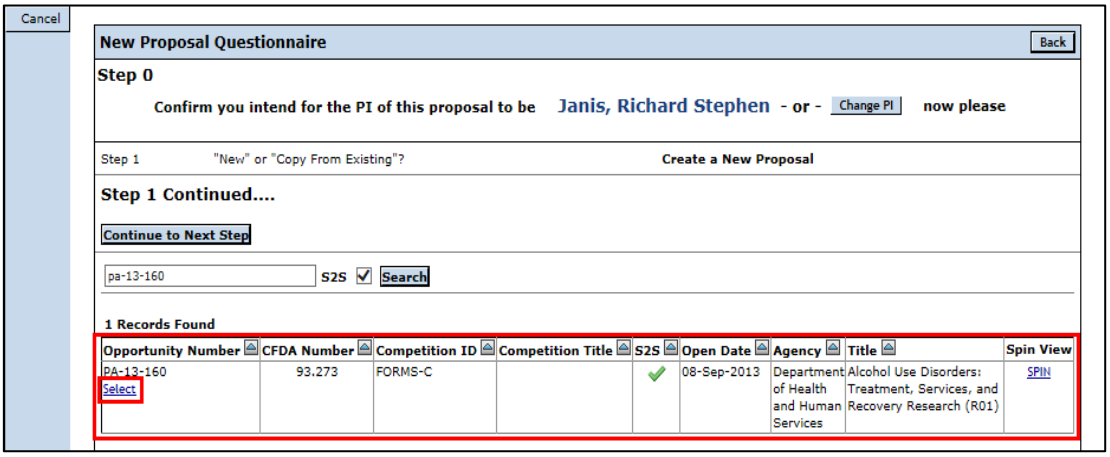
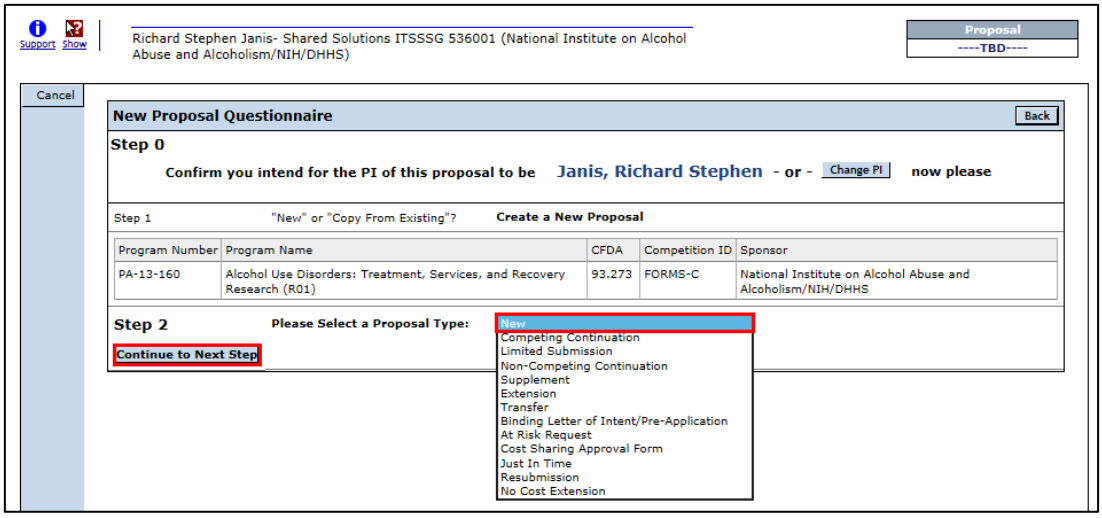
Upon selecting the funding opportunity, you will be routed back to the **New Proposal Questionnaire** screen. Verify that the **Opportunity Number**, **CFDA, Sponsor, and Title** populated correctly from Grants.gov. Click **Select**.

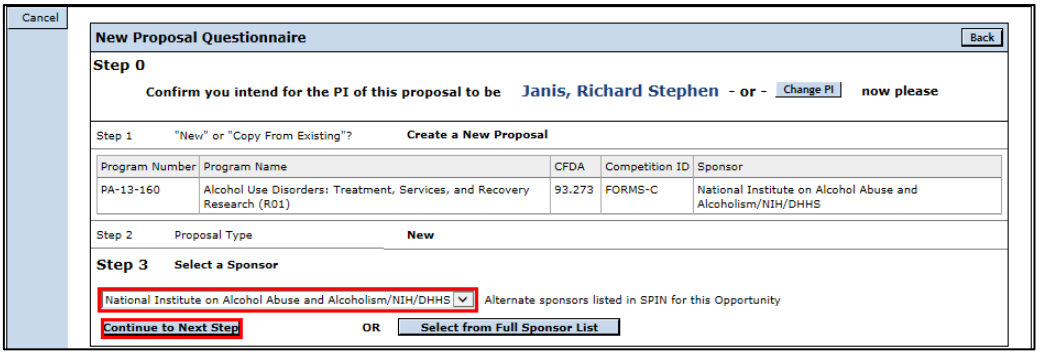
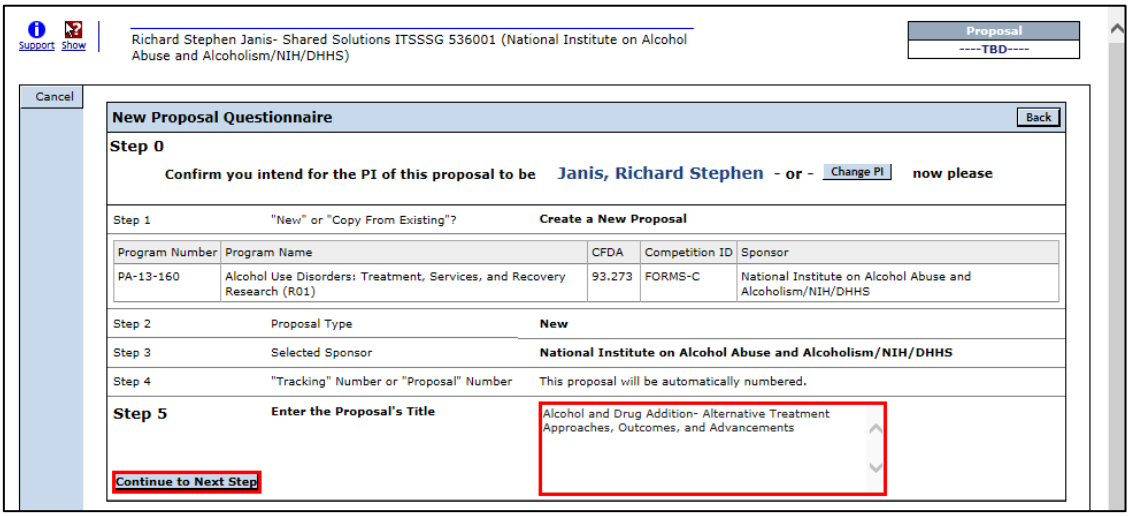


7

Step #2: Use the drop down menu next to **Please Select a Proposal Type** to select the type of proposal that you want to create. *The default **Proposal Type** will be **New**.*

Click **Continue to Next Step**.

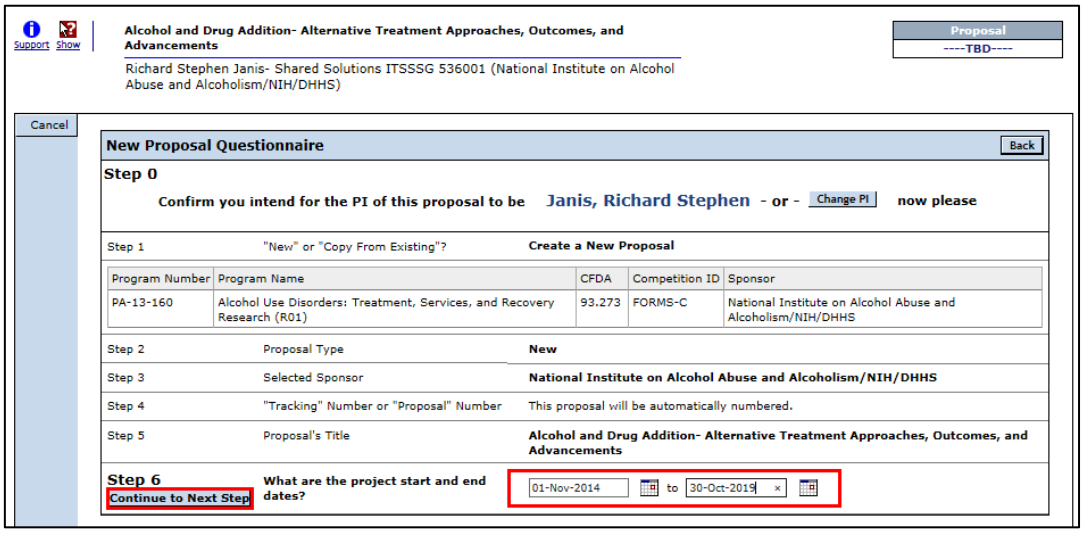


8	**Step #3:** The IRES system automatically populates the sponsor's name in the **Sponsor** field based on the **Grants.gov** opportunity selected. Click **Continue to Next Step**.  **Step #4:** The IRES system will automatically create a **Proposal Number** for the PD Record.
9	**Step #5:** Enter the proposal's **Title** in the **Proposal Title** field, and click the **Continue to Next Step** button. 

10

Step #6: Use the **Show Calendar** icons to enter the project **Start Date** and **End Date**.

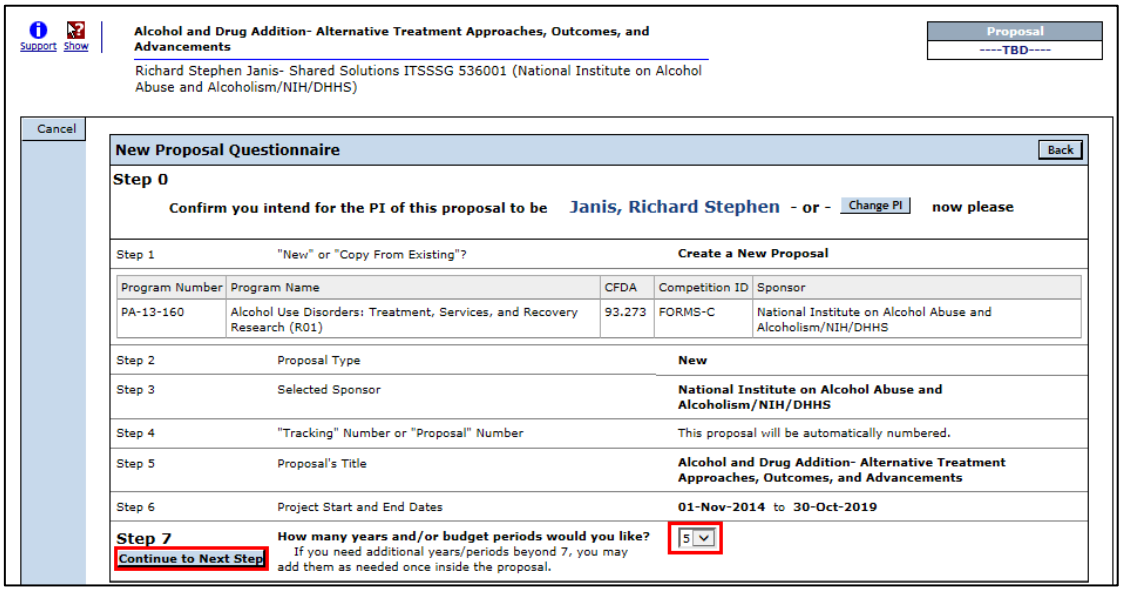
Click the **Continue to Next Step** button.



11

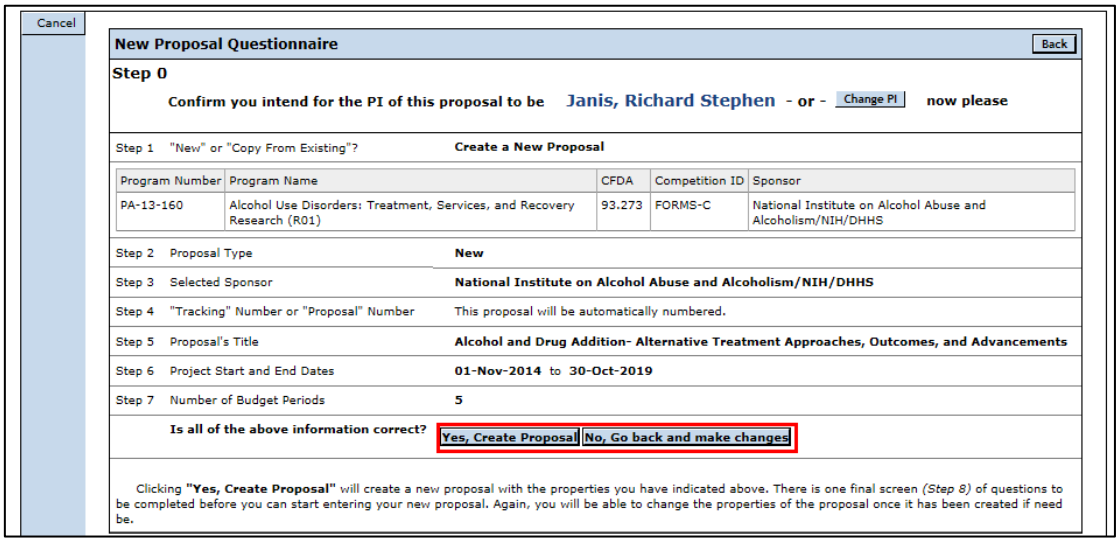
Step #7: Verify that the number of years/periods listed is correct.

Click the **Continue to Next Step** button.



12

1. Verify that the information entered for **Step # 0 – 7** is correct.
2. Click the **No, Go back and make changes** button to edit a specific section.
3. Click the **Yes, Create Proposal** button to create a new proposal with the information entered.



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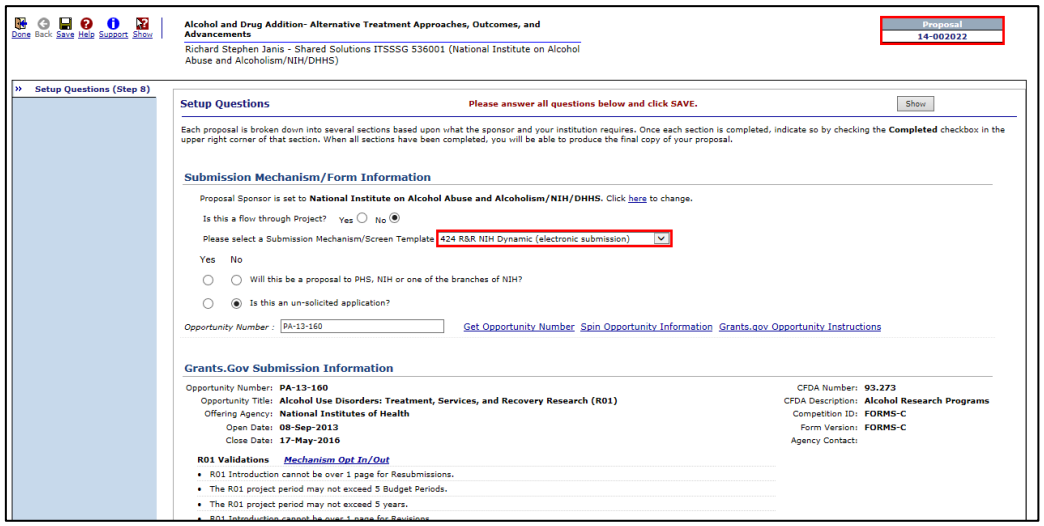
If the **Yes, Create Proposal** button is selected, the **Setup Questions** screen will display.

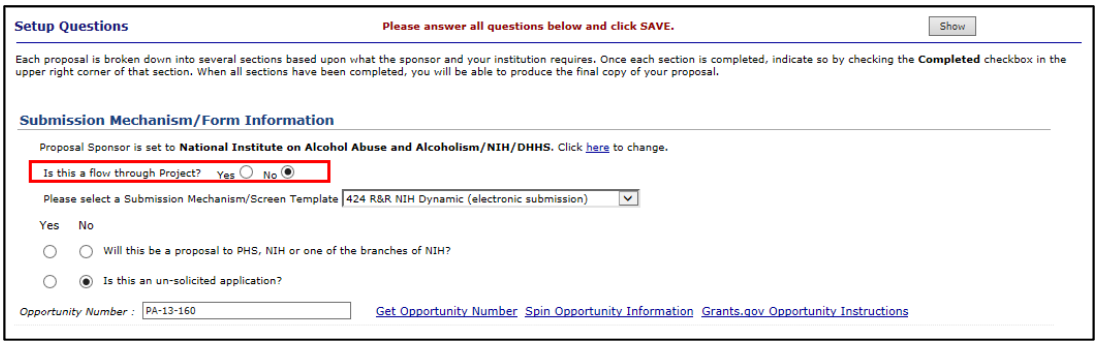
Step #8: Final Setup Questions by Section

Submission Mechanism/Form Information Section:

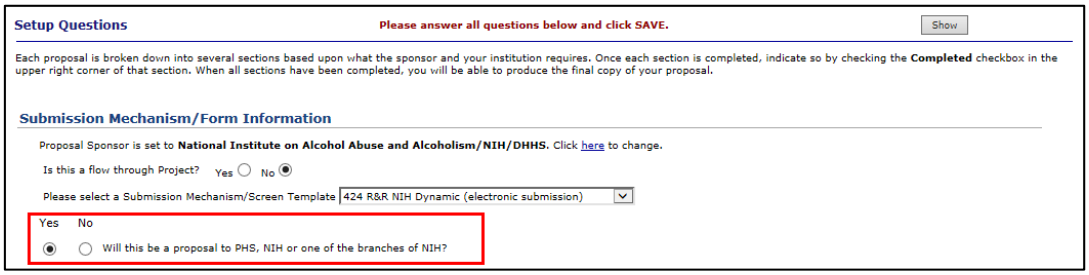
1. Verify that the correct **Submission Mechanism/Screen Template** has been selected and change if necessary. See ***Submission Mechanism/Screen Template*** *for additional information.*



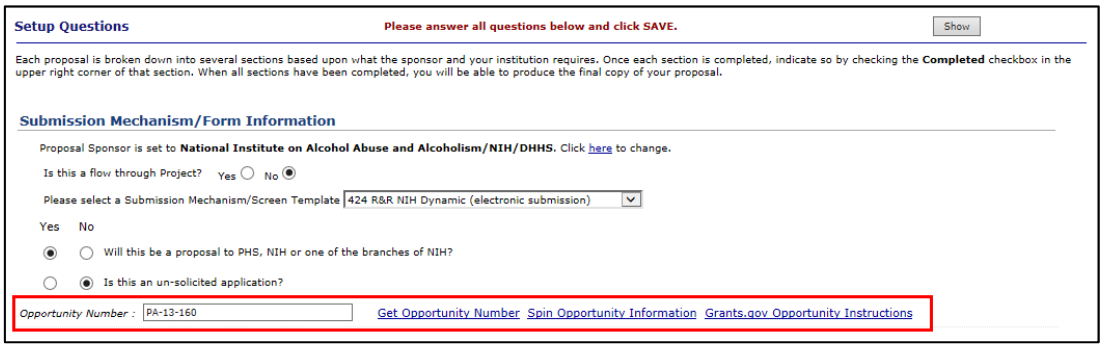
2. If the proposal is a flow through Project, select the **Yes** radio button. *The default selection will always be **No*** for an S2S submission



3. Select the **Yes** or **No** radio button to indicate if the proposal will be to PHS, NIH or one of the branches of NIH.



4. The **Opportunity Number** field will be pre-populated based on the opportunity selected in Grants.gov. If you need to change the Opportunity Number, click the **Get Opportunity Number** link next to the Opportunity Number field to search for the opportunity number.



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Step #8 Continued: Final Setup Questions by Section

Grants.Gov Submission Information Section:

1. Review the **Opportunity** information, validation requirements, and forms included in the proposal template.

Grants.Gov Submission Information

Opportunity Number: **PA-13-160**
Opportunity Title: **Alcohol Use Disorders: Treatment, Services, and Recovery Research (R01)**
Offering Agency: **National Institutes of Health**
Open Date: **08-Sep-2013**
Close Date: **17-May-2016**

CFDA Number: **93.273**
CFDA Description: **Alcohol Research Programs**
Competition ID: **FORMS-C**
Form Version: **FORMS-C**
Agency Contact:

R01 Validations *Mechanism Opt In/Out*

- R01 Introduction cannot be over 1 page for Resubmissions.
- The R01 project period may not exceed 5 Budget Periods.
- The R01 project period may not exceed 5 years.
- R01 Introduction cannot be over 1 page for Revisions.
- R01 Introduction is mandatory for revisions/resubmissions.
- R01 Research Strategy is required.
- R01 Specific Aims is required and limited to 1 page.
- NIH Annual $500,000 direct cost limit applies to this proposal.
- R01 Research Strategy page limit:12 pages.
- For R01 submissions a non-zero value for calendar months, academic months, or summer months is required for each senior/key person.

Form	Version	Included
RR_SF424_2_0	RR_SF424_2_0-V2.0	✓
PHS398_ResearchPlan_2_0	PHS398_ResearchPlan_2_0-V2.0	✓
PHS398_CoverPageSupplement_2_0	PHS398_CoverPageSupplement_2_0-V2.0	✓
RR_KeyPersonExpanded_2_0-V2.0	RR_KeyPersonExpanded_2_0-V2.0	✓
Other Project Info	RR_OtherProjectInfo_1_3-V1.3	✓
PerformanceSite_2_0-V2.0	PerformanceSite_2_0-V2.0	✓
RR_SubawardBudget30_1_3-V1.3	RR_SubawardBudget30_1_3-V1.3	☐
PlannedReport	PlannedReport-V1.0	☐
PHS398_CumulativeInclusionReport	PHS398_CumulativeInclusionReport-V1.0	☐
PHS398_ModularBudget_1_2-V1.2	PHS398_ModularBudget_1_2-V1.2	☐
RR_Budget_1_3	RR_Budget_1_3-V1.3	☑

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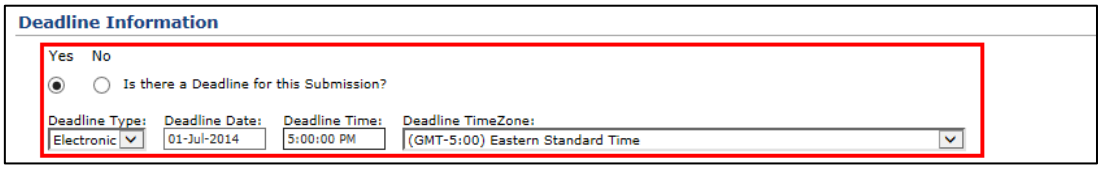
Step #8 Continued: Setup Questions by Section:

Deadline Information Section:

1. Use the drop down menu to select the **Deadline Type**.
2. Review the **Deadline Date** and update if necessary. *(This information is auto-populated.)*
3. Review the **Deadline Time**. *(This information is auto-populated.)*
4. Review the **Deadline Time Zone**. *(This information is auto-populated.)*



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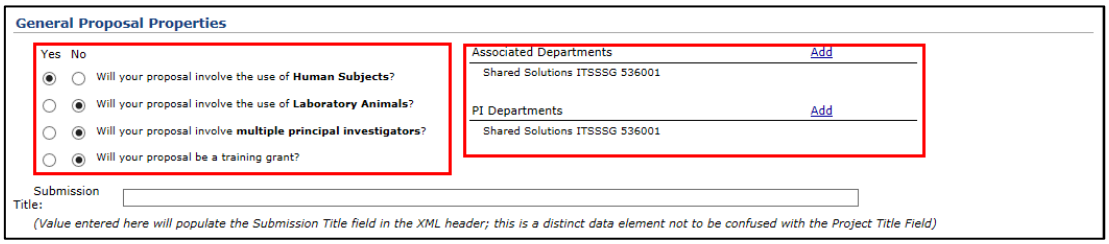
Step #8 Continued: Setup Questions by Section:

General Proposal Properties Section:

1. Select the **Yes** or **No** radio button to indicate if the proposal will involve the use of **Human Subjects**.
2. Select the **Yes** or **No** radio button to indicate if the proposal will involve the use of **Laboratory Animals**.
3. If the proposal will involve **multiple principal investigators**, select **Yes** radio button. *The default selection will be **No**.*
4. **Associated Department** displays the owning organization of the proposal. The default is the PI's owning Org. Update if necessary. For more information see **Changing an Associated Department.**
5. **PI Department** displays the PI's Owinging Org.



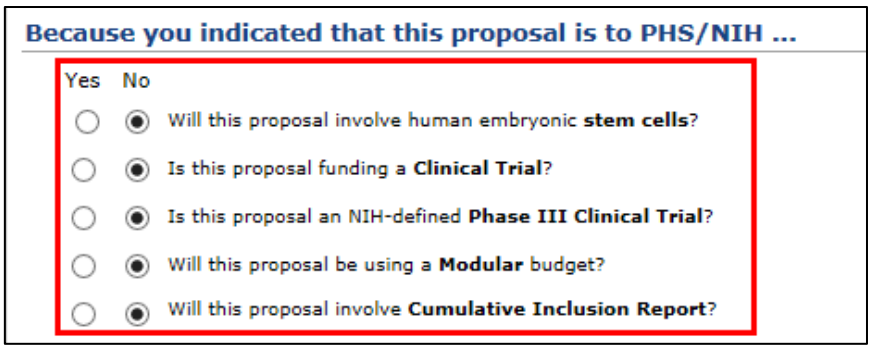
17

Step #8 Continued: Setup Questions by Section:

If you indicated that the proposal will be submitted to PHS, NIH or one of the branches of NIH, the **Because you indicated that this proposal is to PHS/NIH ...** section will display.

Because you indicated that this proposal is to PHS/NIH Section:

1. Select the **Yes** or **No** radio button to indicate if the proposal will involve **Human Embryonic Stem Cells**.
2. Select the **Yes** or **No** radio button to indicate if the proposal is funding a Clinical Trial.
3. Select the **Yes** or **No** radio button to indicate if the proposal is an NIH-defined Phase III Clinical Trial.
4. Select the **Yes** or **No** radio button to indicate if the proposal will be using a Modular budget.



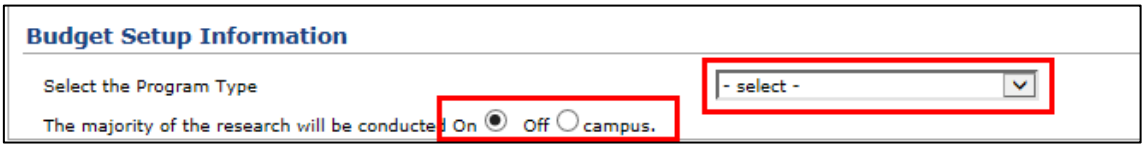
Note: *This section will be hidden if you indicated that the proposal will not be submitted to PHS, NIH or one of the branches of NIH.*

18

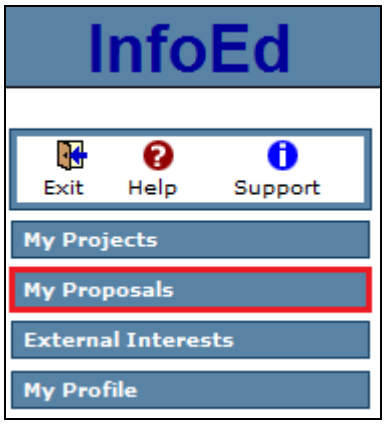
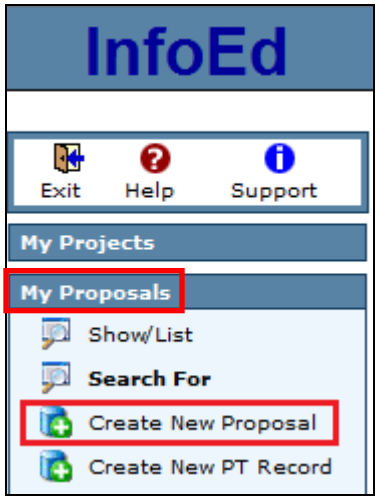
Step #8 Continued: Setup Questions by Section:

Budget Setup Information Section:

1. Use the drop down menu to select the appropriate **Program Type**.
2. If the majority of the research will be conducted off campus, select the **Off** radio button. *The default selection will be **On** campus.*
3. Click **Save and Continue**



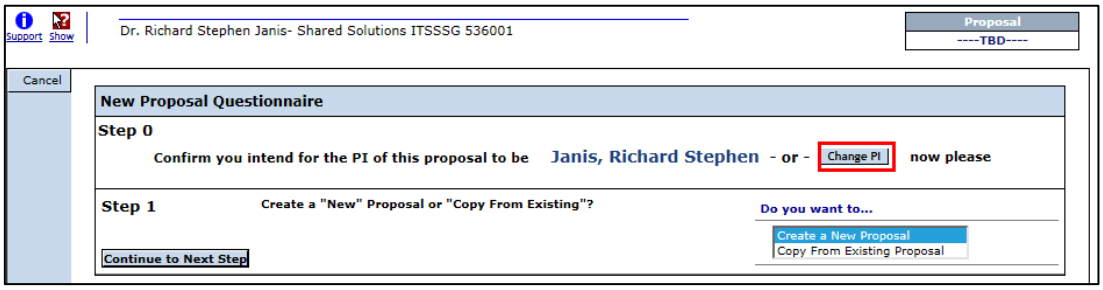
This quick guide highlights the process for creating a *Non-S2S* proposal in **IRES Proposal Development (PD)**.

1	Log into **IRES** and click the **My Proposals** tab. 
2	Click **Create New Proposal**. 

3

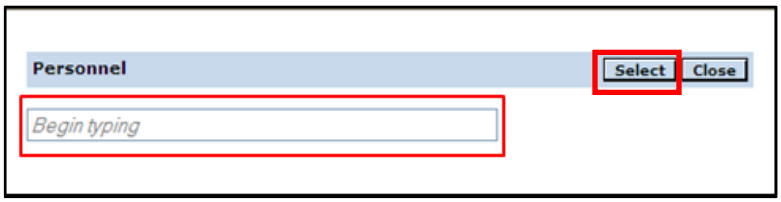
The **Create New Proposal** window will display. Complete the **New Proposal Questionnaire**.

Step #0: Click the **Change PI** button.



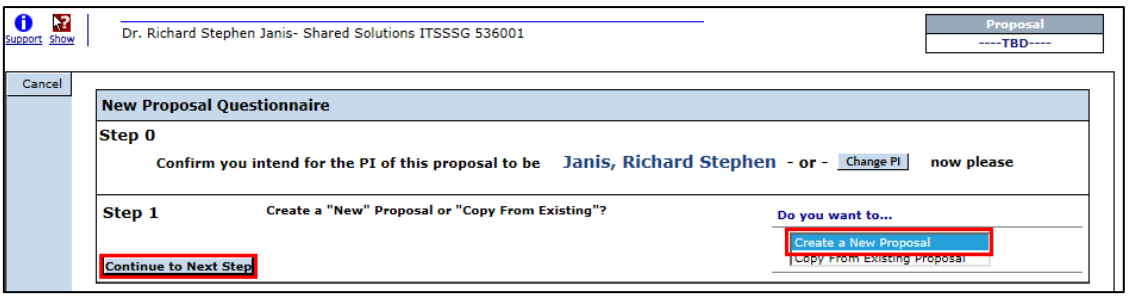
The **Personnel** window will display.

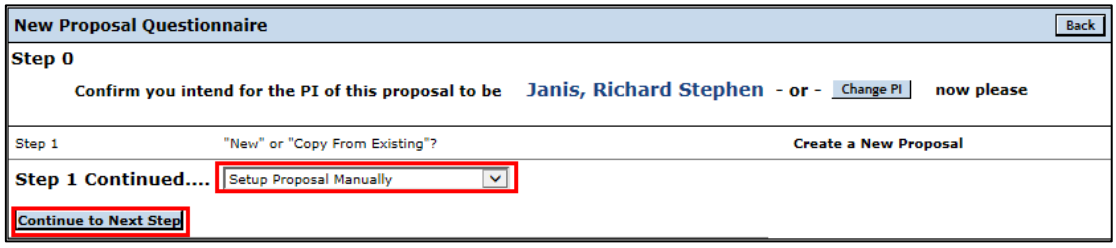
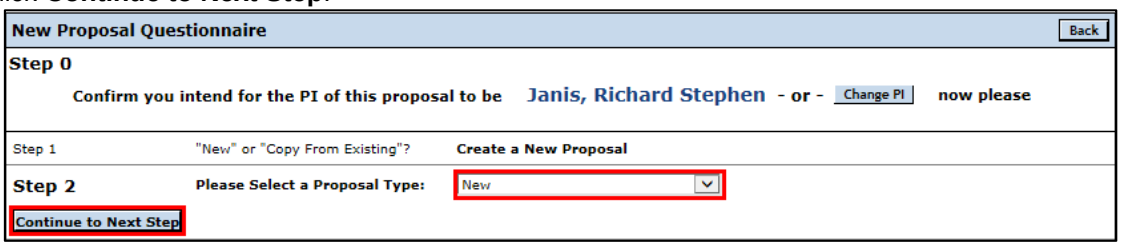
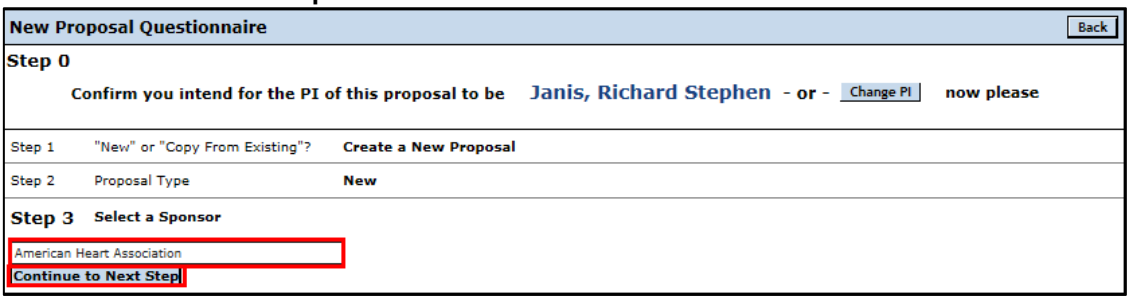
1. Enter the Principal Investigator's (PI) name in the **Progressive Search** field.
2. Locate and click the name of the person in the search results list.
3. Click **Select**.



The PI's name will display in **Step #0**.

Step #1: Confirm that the system defaults to **Create a New Proposal**, and click **Continue to Next Step**.

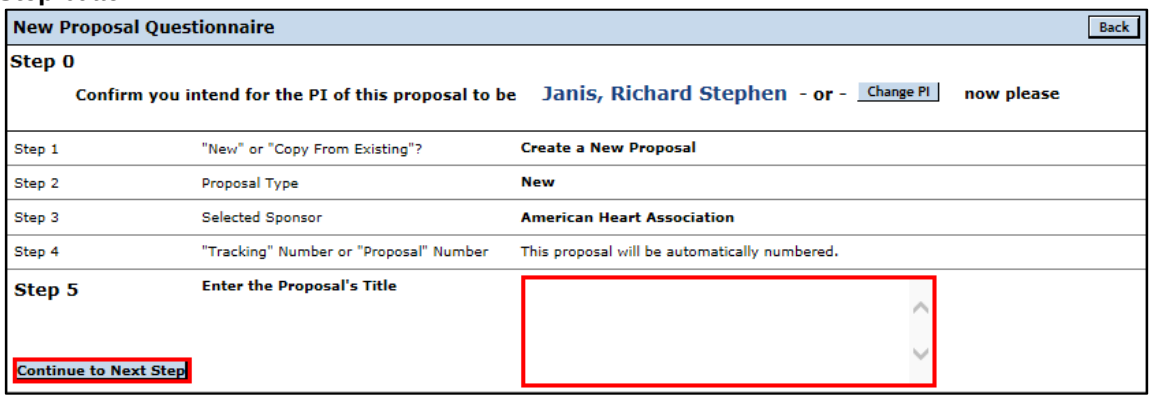


4	**Step #1 Continued:** Use the drop down menu to choose the **Setup Proposal Manually** option. Click **Continue to Next Step**. Note: Clicking the "Back" button will allow you to return to the previous step. 
5	**Step #2:** Use the drop down menu next to **Please Select a Proposal Type** to select the type of proposal that you want to create. *The default **Proposal Type** will be **New**.* Click **Continue to Next Step**. 
6	**Step #3:** Enter the **Sponsor's** name in the **Progressive Search** field. Locate and click the appropriate sponsor's name in the search results list. Click **Continue to Next Step**. 

7

Step #4: The IRES system will automatically create a **Proposal Number** for the PD Record.

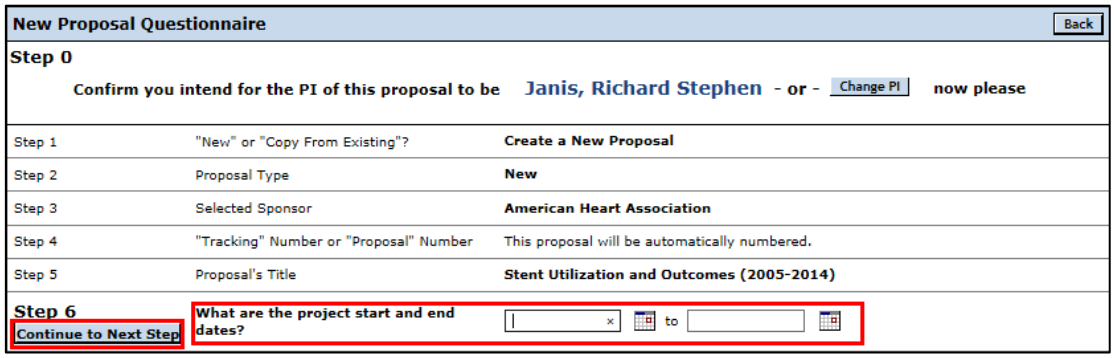
Step #5: Enter the proposal's **Title** in the **Proposal Title** field, and click the **Continue to Next Step** button.



8

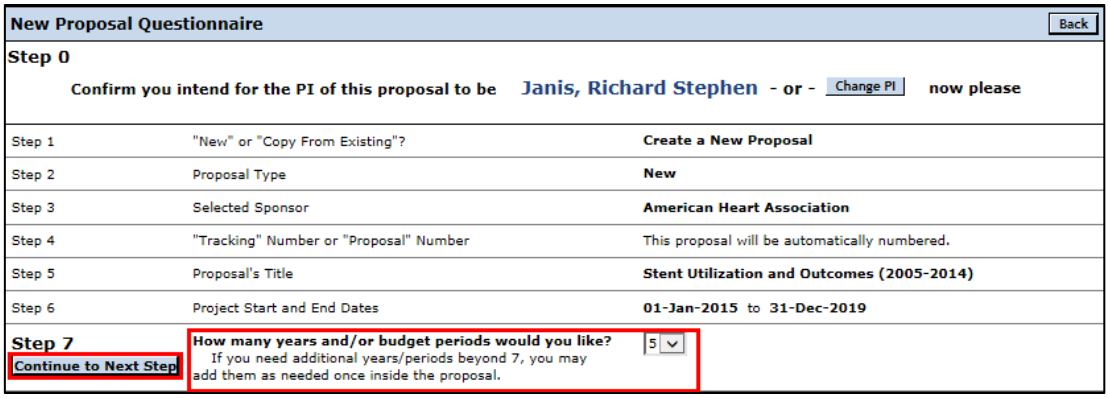
Step #6: Use the **Show Calendar** icons to enter the project **Start Date** and **End Date**.

Click **Continue to Next Step**.



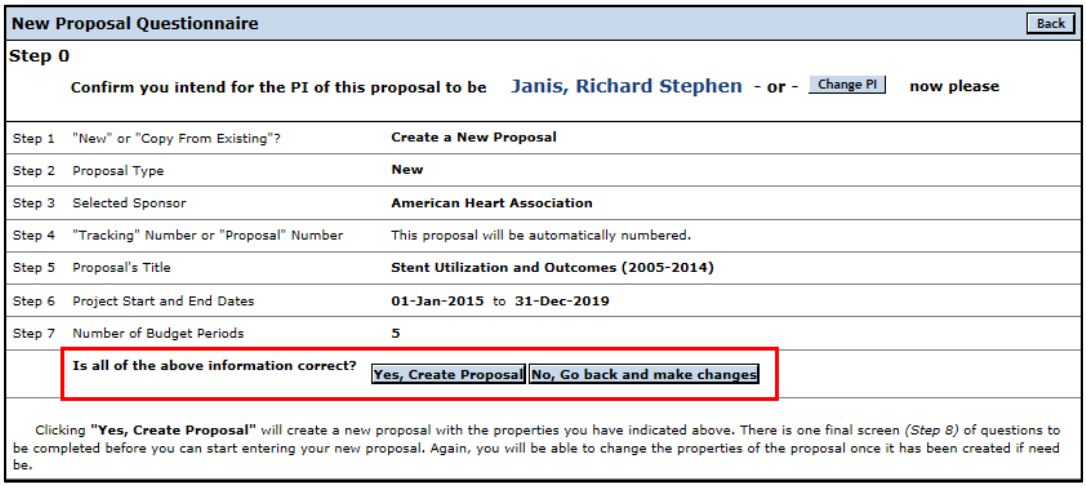
9

Step #7: Verify that the number of years/periods listed is correct. Click **Continue to Next Step** button.



10

1. Verify that the information entered for **Step # 0 – 7** is correct.
2. Click the **No, Go back and make changes** button to edit a specific section.
3. Click the **Yes, Create Proposal** button to create a new proposal with the information entered.



11

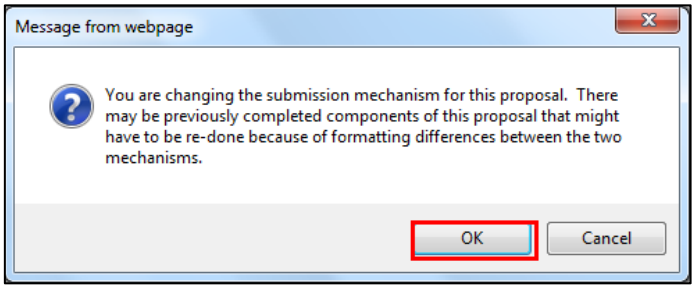
If the **Yes, Create Proposal** button is selected, the **Setup Questions** screen will display.

Step #8: Final Setup Questions by Section

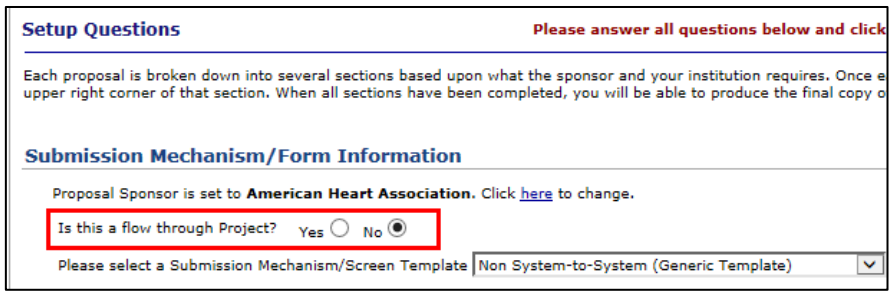
Select **the appropriate submission mechanism/screen template.** See **Submission Mechanism/Screen Template** guide for more information.

A window will pop-up prompting you to confirm the change to the **Submission Mechanism/Screen Template** for the proposal.

1. Click the **OK** button.

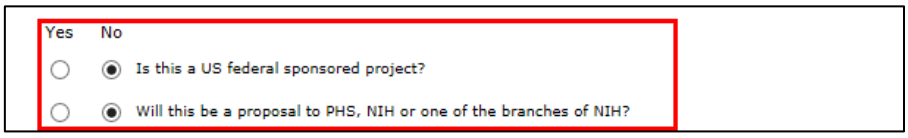


3. Select the **Yes** or **No** radio button to indicate that the proposal is a flow through Project.



4. If the proposal is a U.S. federal sponsored project, select the **Yes** radio button. *The default selection will be **No**.*
   - *If Yes is selected, a window will appear to populate the Proposal Sponsor and Originating sponsor.*
     - *Click the Change link, search for the Sponsor Name and click the Select button*

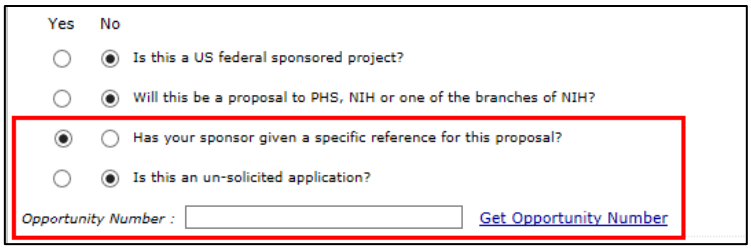
5. If the proposal will be to PHS, NIH or one of the branches of NIH, select the **Yes** radio button. *The default selection will be **No**.*

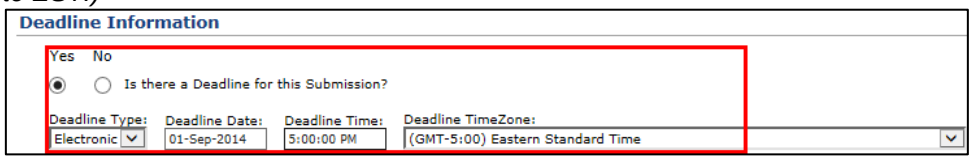
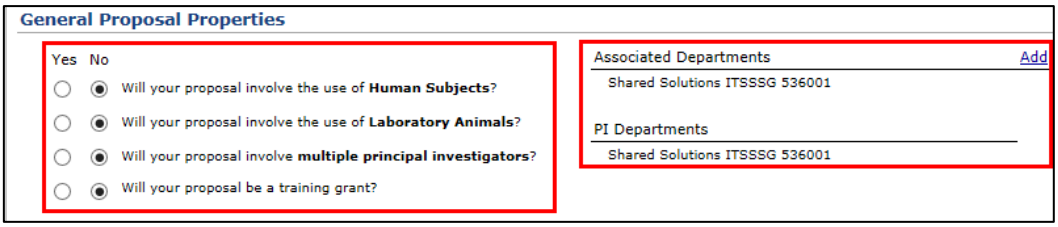


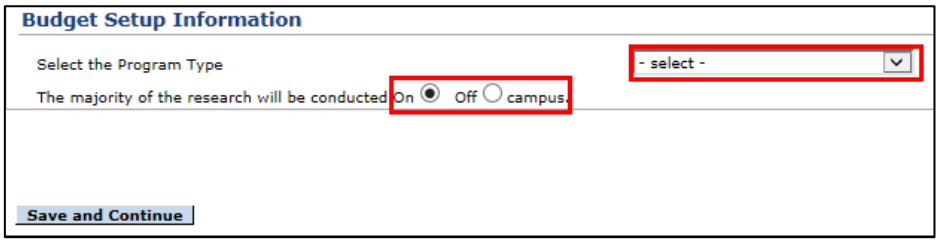
6. If the sponsor has given a specific reference number for the proposal, select the **Yes** radio button. *The default selection will be **No**.*

   a. If the **Yes** radio button is selected, enter the **Opportunity Number** in the **Opportunity Number** field.

7. If this is an un-solicited application, select the **Yes** radio button. *The default selection will be **No**.*



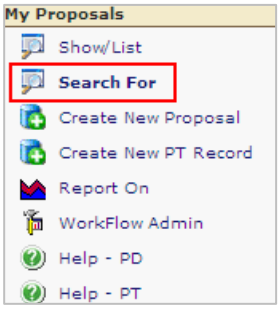
12	**Step #8 Continued: Setup Questions by Section:** **Deadline Information Section:** 1. Use the drop down menu to select the **Deadline Type**. 2. Enter the **Deadline Date** (if applicable). 3. Review and modify the **Deadline Time** (if necessary). *(This information will default to 5:00p.m.)* 4. Review and modify the **Deadline Time Zone** (if necessary). *(This information will default to EST.)* 
13	**Step #8 Continued: Setup Questions by Section:** **General Proposal Properties Section:** 1. Select the **Yes** or **No** radio button to indicate if the proposal will involve the use of **Human Subjects**. 2. Select the **Yes** or **No** radio button to indicate if the proposal will involve the use of **Laboratory Animals**. 3. If the proposal will involve **multiple principal investigators**, select **Yes** radio button. *The default selection will be **No**.* 4. **Associated Department** displays the owning organization of the proposal. The default is the PI's owning Org. Update if necessary. For more information see **Changing Associated Departments** guide. 5. **PI Department** displays the PI's Owinging Org. 

14	**Step #8 Continued: Setup Questions by Section:** **Budget Setup Information Section:** 1. Use the drop down menu to select the appropriate **Program Type**. 2. If the majority of the research will be conducted off campus, select the **Off** radio button. *The default selection will be **On** campus.* 
15	Click **Save and Continue**. 

This quick guide highlights the process for creating a Child Record proposal in **IRES Proposal Development (PD)**. **Note:** *The types of PD **Child Record** proposals that may be created include:*

- *Non-Competing Continuation*
- *Supplement*
- *Extension*
- *Just In Time (JIT) for revised budgets*

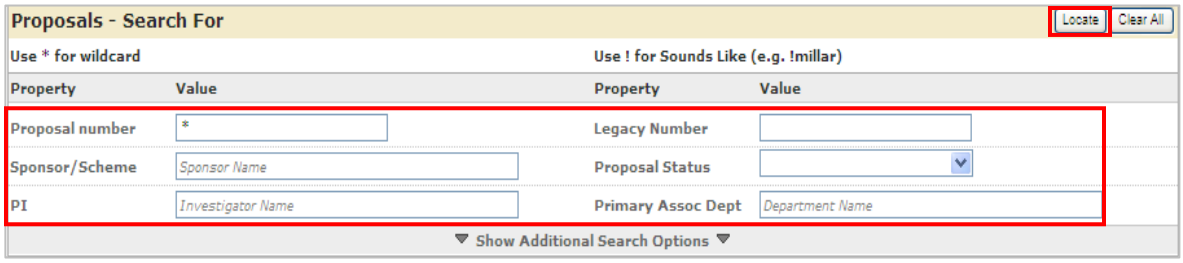
1 Click **Search For** under the **My Proposals** tab.



2 Enter the search criteria in the appropriate search field. Search using any of the following criteria:

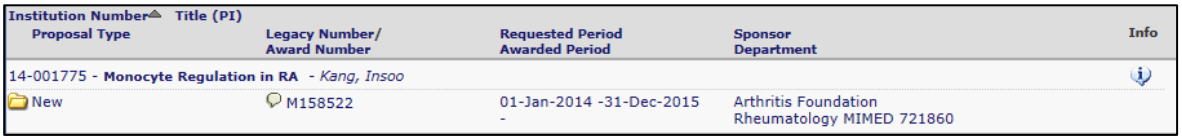
- **Proposal Number**
- **Sponsor/Scheme** (Name)
- **PI** (Last Name)
- **Legacy Number**
- **Proposal Status**
- **Primary Assoc Dept.**

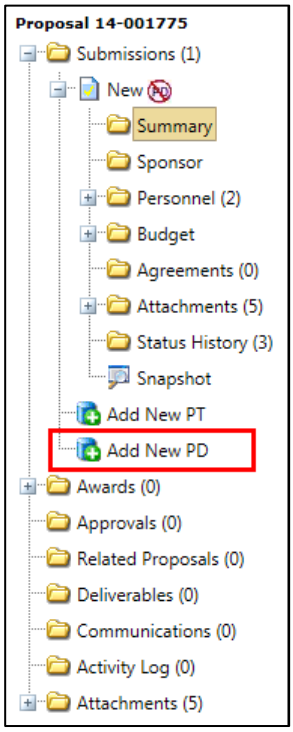
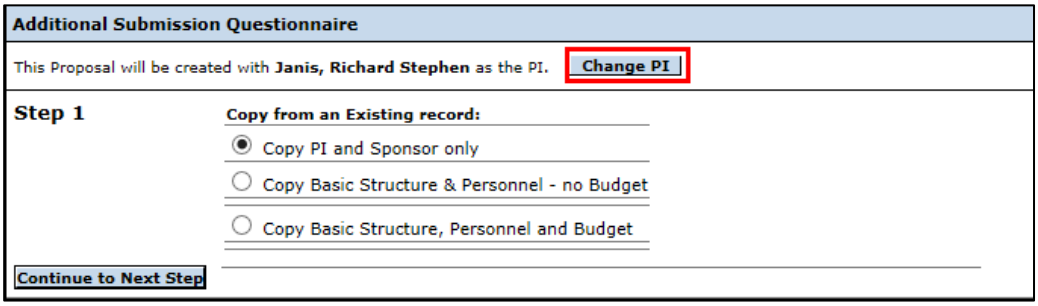
Click **Locate**.



Note: *Use the wildcard (*) symbol to replace unknown values in non-progressive search fields. Place the wildcard at the beginning or end of the information entered.*

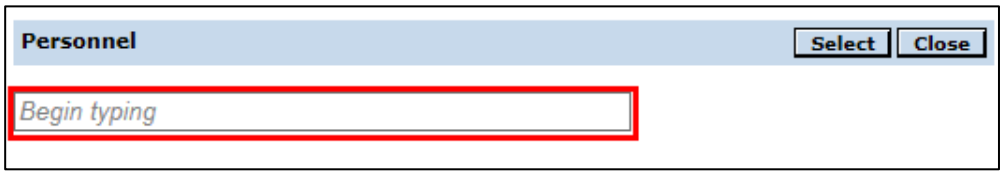
3 All results matching your search criteria will display below.



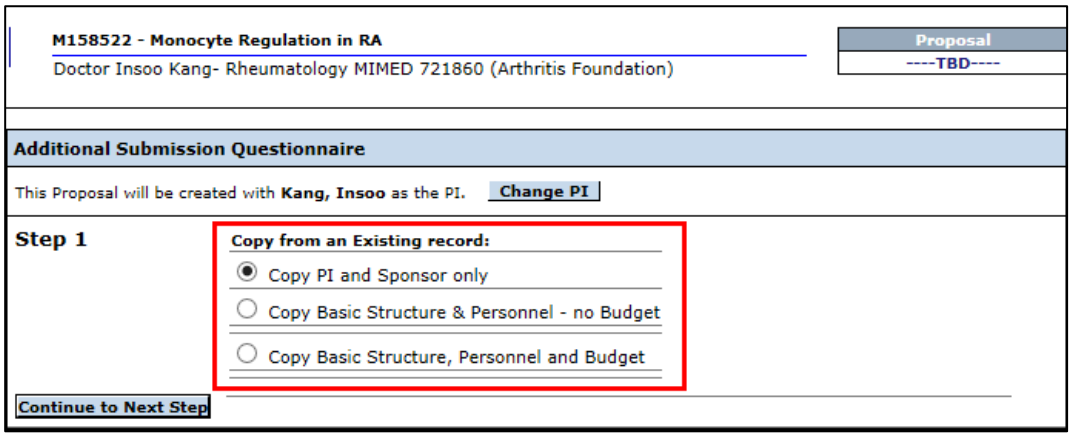
4	Scroll your mouse over the folder ( ) icon and the record menu bar will display. Click the **Edit PT Proposal** icon to open the PT Record. 
5	Click the **Add New PD** icon located in the proposal tree. 
6	The **Additional Submission Questionnaire** screen will display. Click the **Change PI** button. 

The **Personnel** window will display.

1. Enter the Principal Investigator's (PI) last name in the Progressive Search field.
2. Use the drop down menu to select the correct PI.
3. Click **Select**.

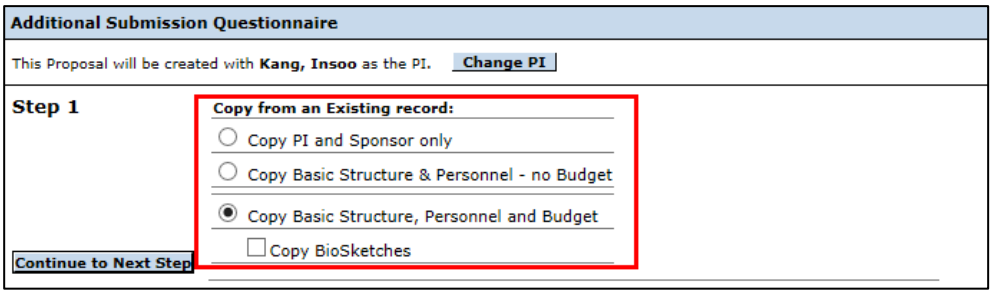


7 The PI's name will display.

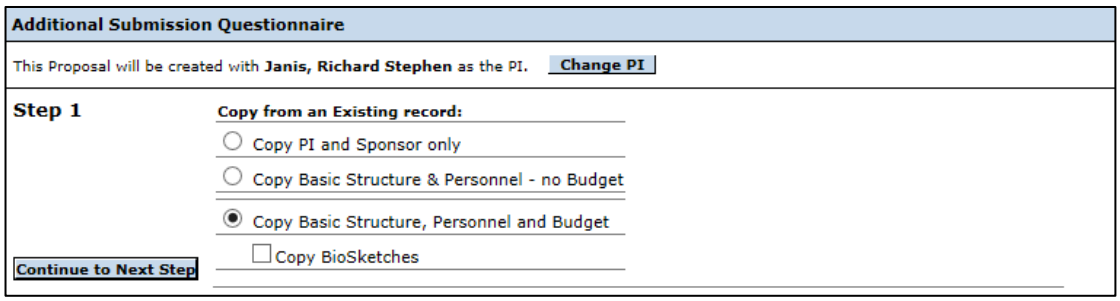


1. Select the appropriate **Copy from an Existing record (Copy Basic Structure, Personnel and Budget)** radio button:

- **Copy Basic Structure, Personnel and Budget:** *This option copies all of the information pulled for the "**Copy PI and Sponsor only**" and the "**Copy Basic Structure & Personnel – no Budget**" options, as well as the structure of the Budget and all dollar amounts.*



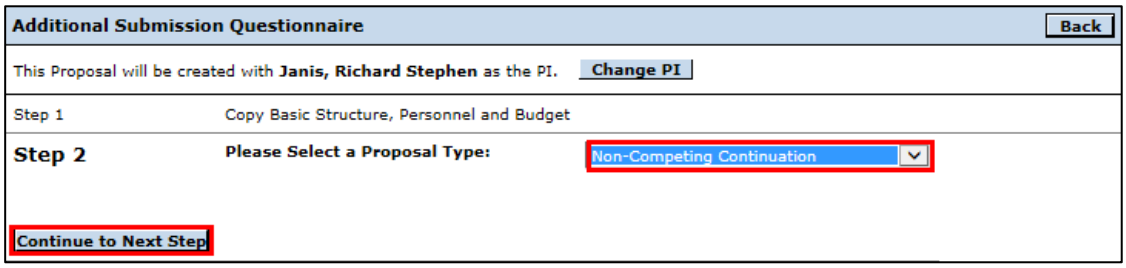
2. Upon selecting a **Copy** option, the **Copy BioSketches** check box will display.



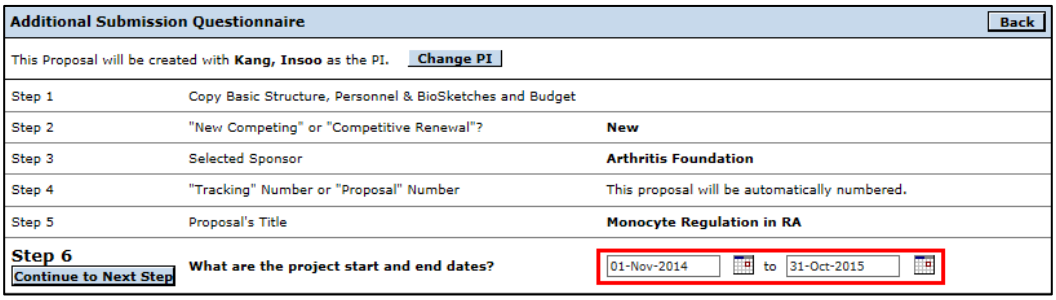
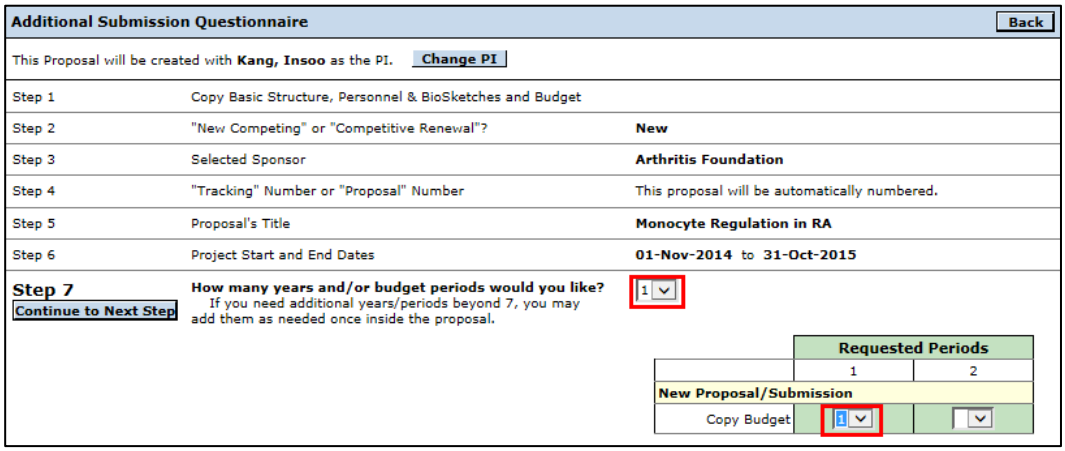
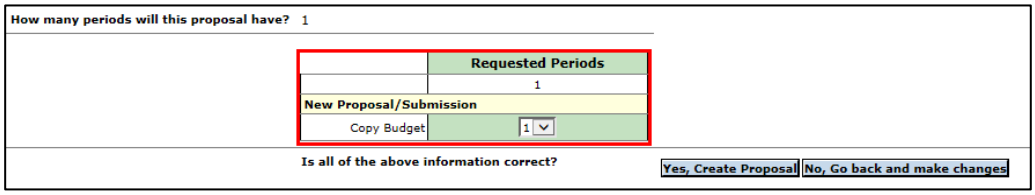
3. Click **Continue to Next Step**.

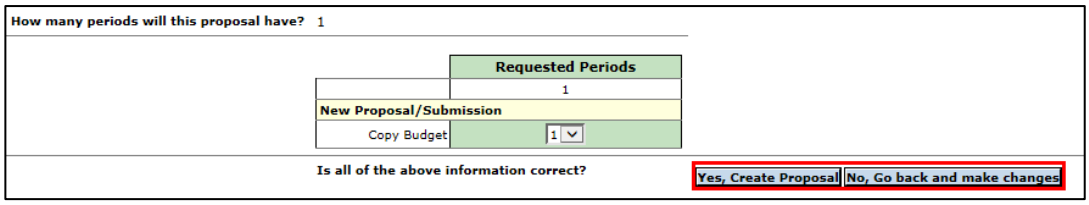
8 Select the appropriate Child Record option from the **Please Select a Proposal Type** from the drop down menu.

Click **Continue to Next Step**.



Refer to ***Understanding Parent/Master and Child Records*** *for additional information.*

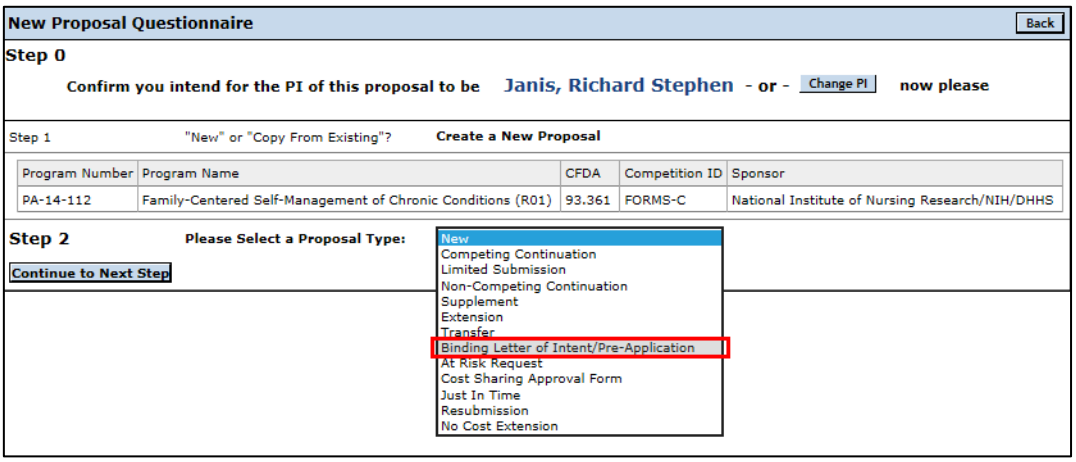
9	Use the **Show Calendar** icons to modify the project **Start Date** and **End Date**, if necessary. *(These fields auto-populate.)* Click **Continue to Next Step**.  **Additional Submission Questionnaire** Back This Proposal will be created with **Kang, Insoo** as the PI. Change PI Step 1 Copy Basic Structure, Personnel & BioSketches and Budget Step 2 "New Competing" or "Competitive Renewal"? **New** Step 3 Selected Sponsor **Arthritis Foundation** Step 4 "Tracking" Number or "Proposal" Number This proposal will be automatically numbered. Step 5 Proposal's Title **Monocyte Regulation in RA** **Step 6** Continue to Next Step **What are the project start and end dates?** 01-Nov-2014 to 31-Oct-2015
10	1. Verify that the number of years/periods listed is correct. 2. Click **Continue to Next Step**.  **Additional Submission Questionnaire** Back This Proposal will be created with **Kang, Insoo** as the PI. Change PI Step 1 Copy Basic Structure, Personnel & BioSketches and Budget Step 2 "New Competing" or "Competitive Renewal"? **New** Step 3 Selected Sponsor **Arthritis Foundation** Step 4 "Tracking" Number or "Proposal" Number This proposal will be automatically numbered. Step 5 Proposal's Title **Monocyte Regulation in RA** Step 6 Project Start and End Dates **01-Nov-2014** to **31-Oct-2015** **Step 7** Continue to Next Step **How many years and/or budget periods would you like?** If you need additional years/periods beyond 7, you may add them as needed once inside the proposal. 1 Requested Periods 1 2 New Proposal/Submission Copy Budget 1 3. Navigate to the **Requested Periods** column that corresponds to the budget period you want to copy. Use the **Copy Budget** drop down menu to select the appropriate **Period/Budget**. **Note:** This step only occurs if you chose to copy the budget.  **How many periods will this proposal have?** 1 Requested Periods 1 New Proposal/Submission Copy Budget 1 **Is all of the above information correct?** Yes, Create Proposal No, Go back and make changes

11	1. Verify that the information entered for **Step # 0 – 7** is correct. 2. Click the **No, Go back and make changes** button to edit a specific section. 3. Click the **Yes, Create Proposal** button to create a new proposal with the information entered. 
12	Complete the following sections on the **Setup Questions** screen: • **Submission Mechanism/Form Information** *(Choose the appropriate template. For more information see the* ***Submission Mechanism/Screen Template Maxtrix*** *guide.* • **Grants.Gov Submission Information** *(if applicable)* • **Deadline Information Section** • **General Proposal Properties Section** • **Budget Setup Information** Click **Save and Continue**.

This quick guide highlights the process for entering a Binding Letter of Intent/Pre-Application proposal in **IRES Proposal Development (PD)**.

1 Complete the **New Proposal Questionnaire** setup questions (*See* ***Initiating a Proposal Non-S2S*** *for additional guidance*)

Select **Binding Letter of Intent/Pre-Application** as the **Proposal Type** in **Step #2**

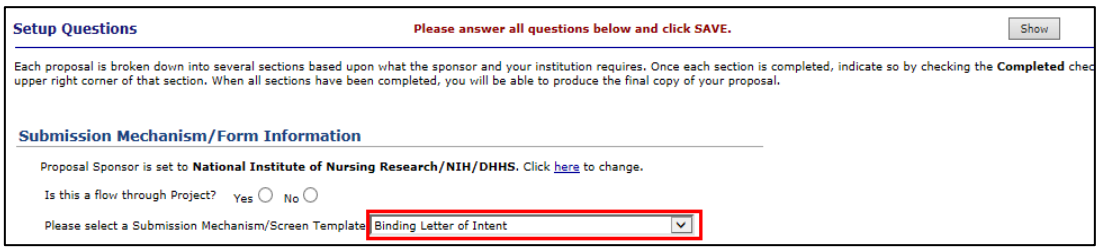


2 After the **Yes, Create Proposal** button is selected, the **Setup Questions** screen will display.

Note: *Answering the Setup Questions will drive the selection of the appropriate proposal template that is generated for the proposal.*

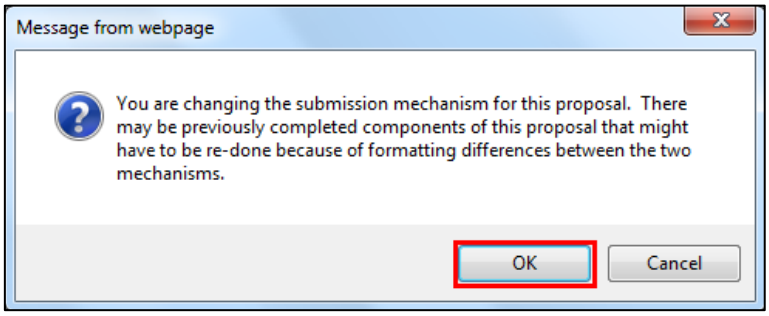
Submission Mechanism/Form Information Section:

1. Select the **Binding Letter of Intent/Pre-Application** option from the **Submission Mechanism/Screen Template** drop down menu.

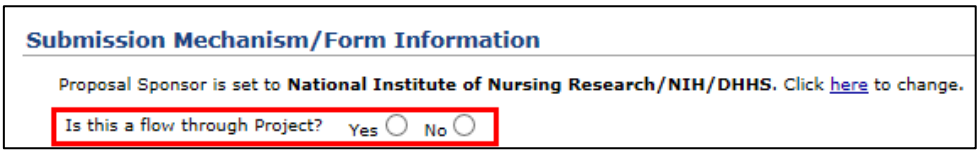


A window will pop-up prompting you to confirm the change to the **Submission Mechanism/Screen Template** for the proposal.

2. Click the **OK** button.



3. Select the **Yes** or **No** radio button to indicate if the proposal is a flow through Project.



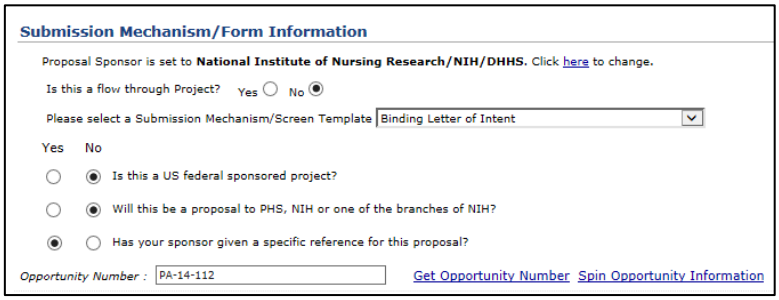
- *If Yes is selected, a window will appear to populate the Proposal Sponsor and Originating sponsor.*
  - *Click the Change link, search for the Sponsor Name and click the Select button*

4. If the proposal is a U.S. federal sponsored project, select the **Yes** radio button.

5. If the proposal will be to PHS, NIH or one of the branches of NIH, select the **Yes** radio button.

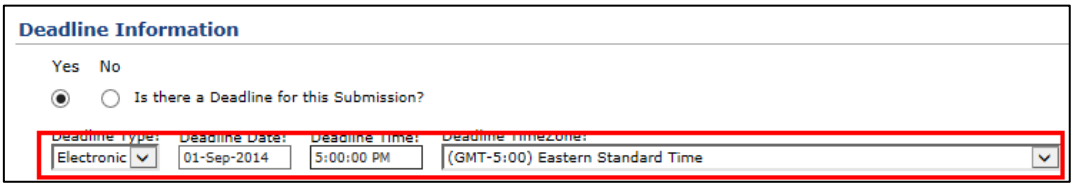
6. If the sponsor has given a specific reference number for the proposal, select the **Yes** radio button. *The default selection will be **No**.*

   a. If the **Yes** radio button is selected, enter the **Opportunity Number** in the **Opportunity Number** field.



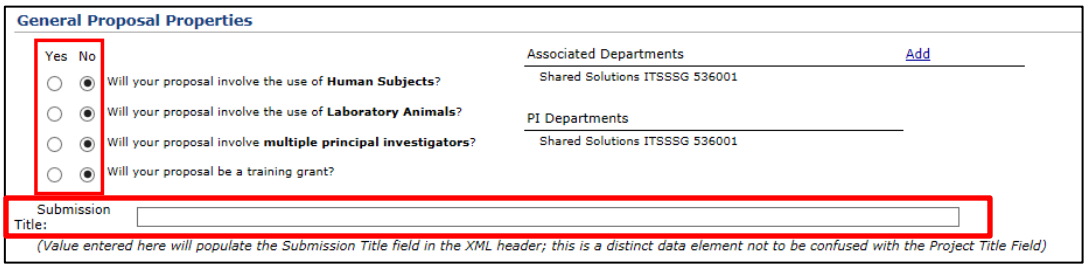
Deadline Information Section:

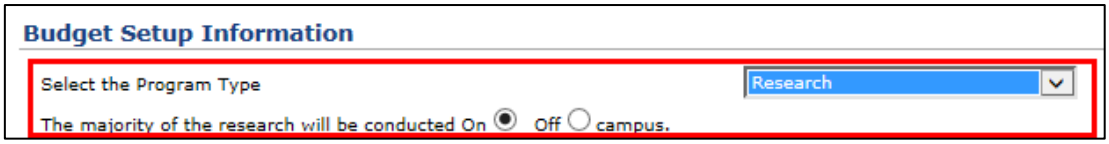
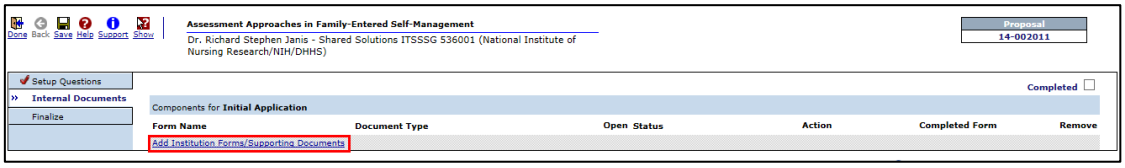
1. Use the drop down menu to select the **Deadline Type**.
2. Enter the **Deadline Date** (if applicable).
3. Review and modify the **Deadline Time** (if necessary). *(This information will default to 5:00p.m.)*
4. Review and modify the **Deadline Time Zone** (if necessary). *(This information will default to EST.)*



3 **General Proposal Properties Section:**

1. Select the **Yes** or **No** radio button to indicate if the proposal will involve the use of **Human Subjects**.
2. Select the **Yes** or **No** radio button to indicate if the proposal will involve the use of **Laboratory Animals**.
3. If the proposal will involve **multiple principal investigators**, select **Yes** radio button. *The default selection will be **No**.*
4. If the proposal will be a **training grant**, select **Yes** radio button. *The default selection will be **No**.*
5. Leave the **Submission Title** field blank.



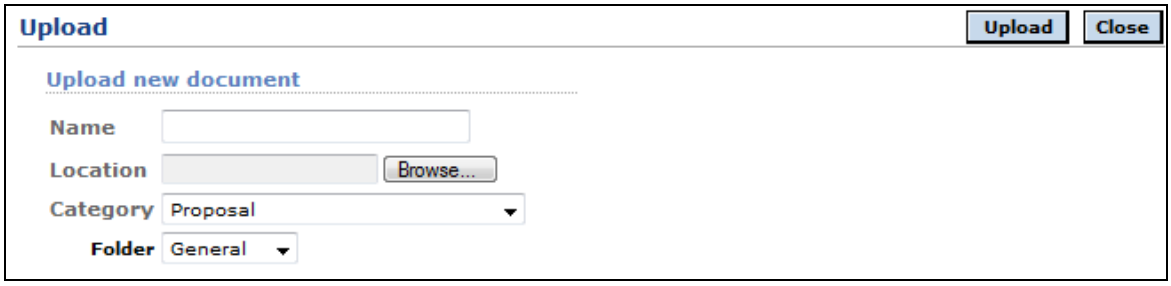
4	**Budget Setup Information Section:** 1. Use the drop down menu to select the appropriate **Program Type**. 2. If the majority of the research will be conducted off campus, select the **Off** radio button. *The default selection will be **On** campus.* 3. Click **Save and Continue**. 
5	Upon clicking the **Save and Continue** button, the **Internal Documents** tab will display. Click the **Add Institution Forms/Supporting Documents** link. 

6

The **Add Institution Forms/Supporting Documents** screen will appear.

To upload the **Binding Letter of Intent/Pre-Application**, navigate to the **Upload** section of the screen.

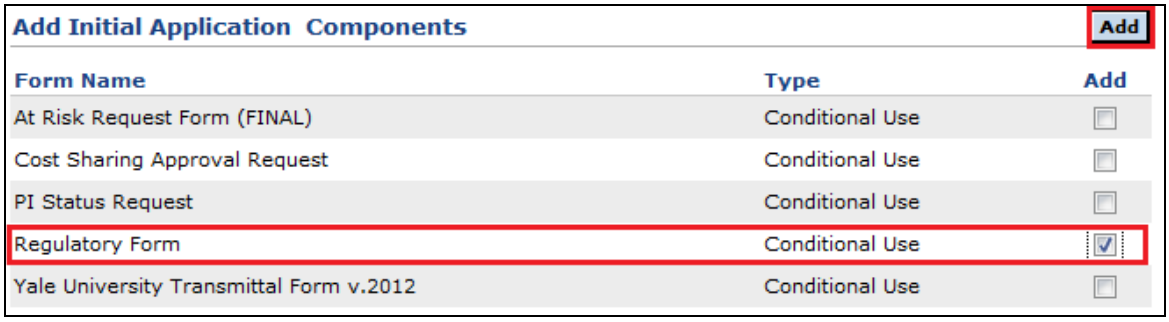
1. Enter the name of the document in the **Name** field.
2. Click **Browse** to search for the **Binding Letter of Intent** document.
3. Use the **Category** drop down menu to select the **Proposal** option.
4. Click the **Upload** button to attach the document to the PD Record.
5. Use the **Folder** drop down menu to select the **General** folder option. *The default will be ROOT*.
6. Click the **Close** button.



7

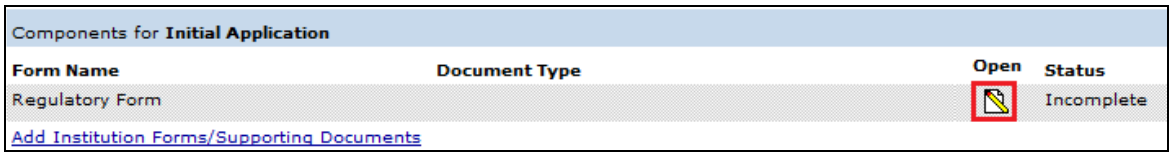
To add the **Regulatory Form**, click **Add Institution Forms/Supporting Documents**, navigate to the **Add Initial Application Components** section of the screen.

1. Click the box to add the **Regulatory Form**
2. Click **Add**



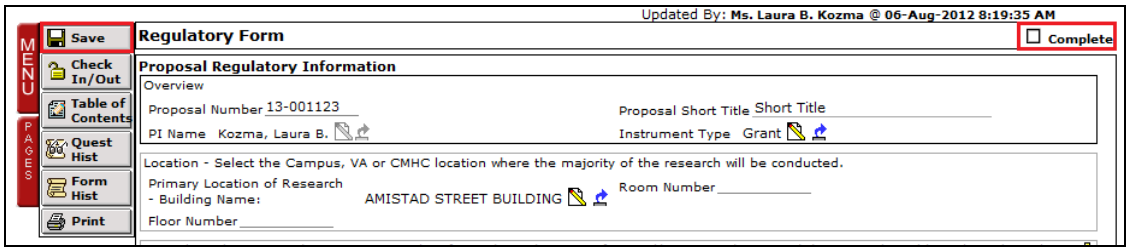
8

Click the edit icon to open the form.



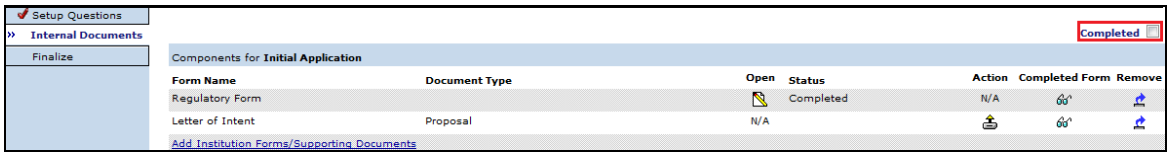
Complete all required sections with information obtained from the PI.

Click **Save** and **Complete.**

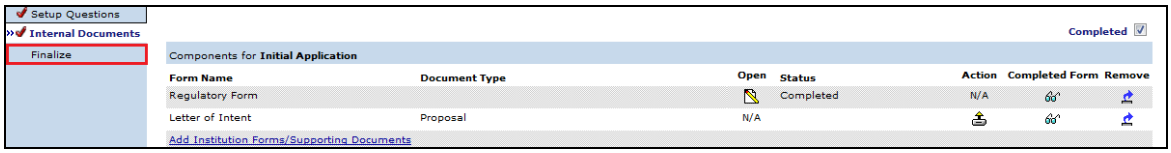


Note: *Follow Steps 7-8 to add any other required e-forms*

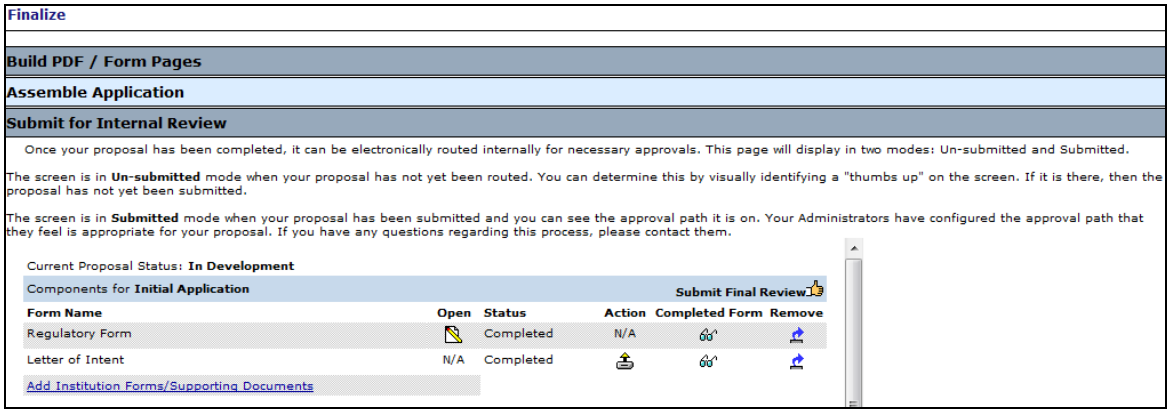
9 Click the **Completed** check box.



10 Click the **Finalize** tab.



11 The **Submit for Internal Review** section will display.

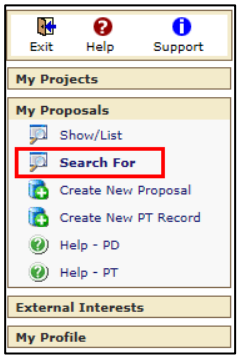


Refer to the **Finalizing and Submitting a Non-S2S Proposal** guide for information on how to route the record for review and approval..

This quick guide highlights the process for creating a Non-Competing Continuation (NCC) Child Record proposal in **IRES Proposal Development (PD)**.

1 Log into **IRES**.

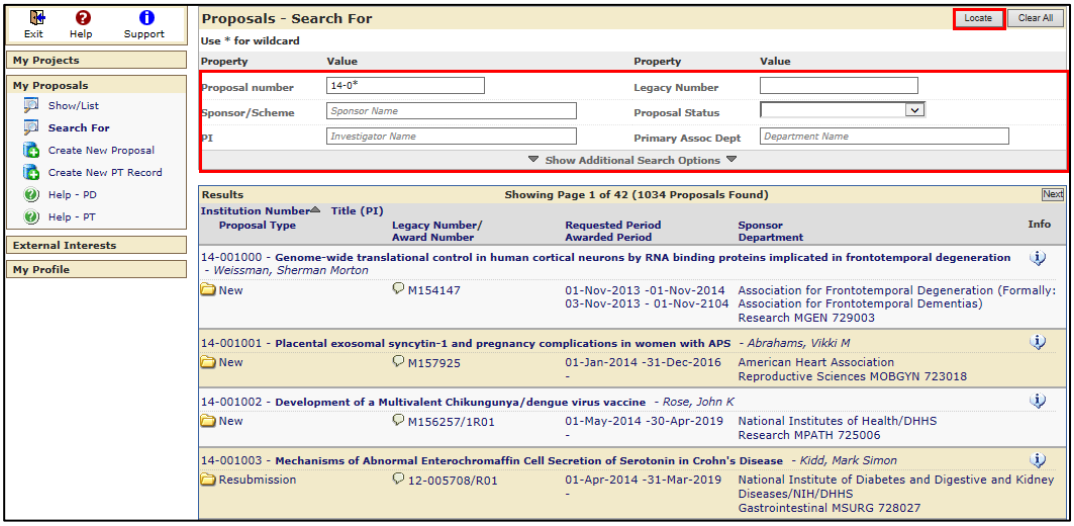
Click **Search For** under the **My Proposals** tab.



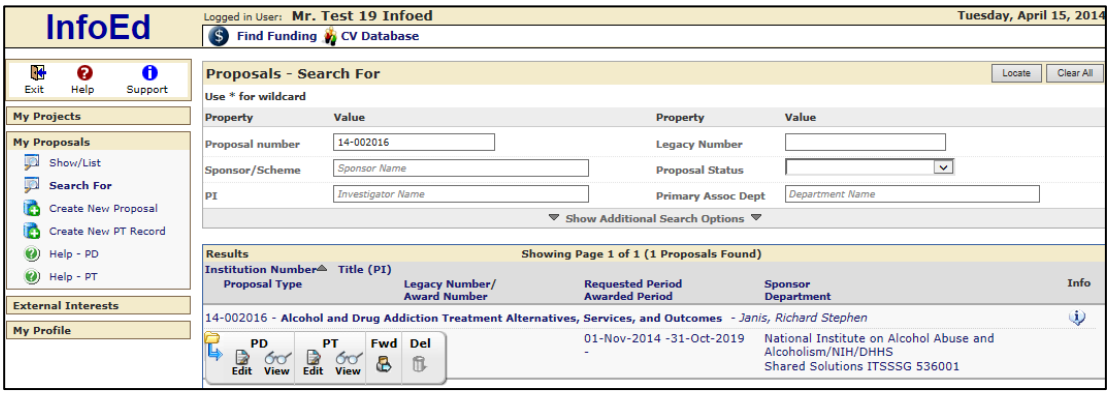
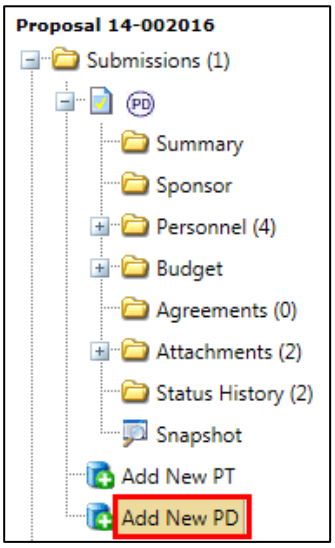
2 Enter the search criteria in the appropriate search field. Search using any of the following criteria:

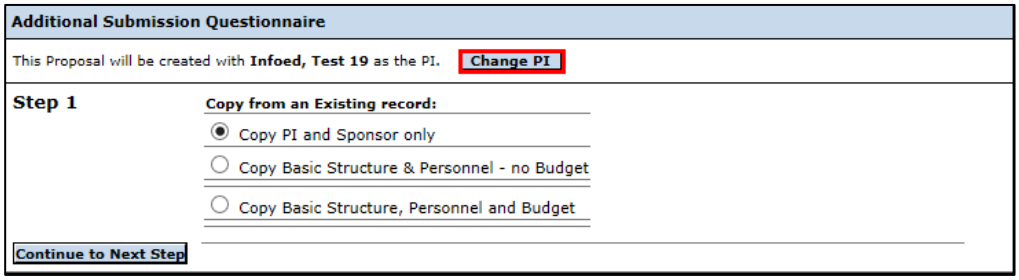
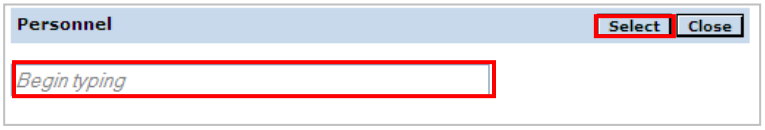
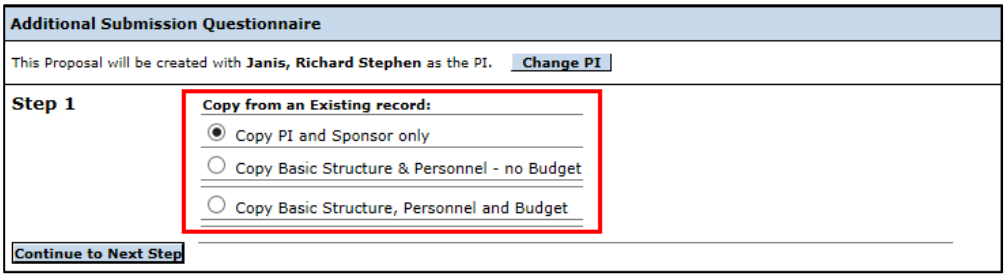
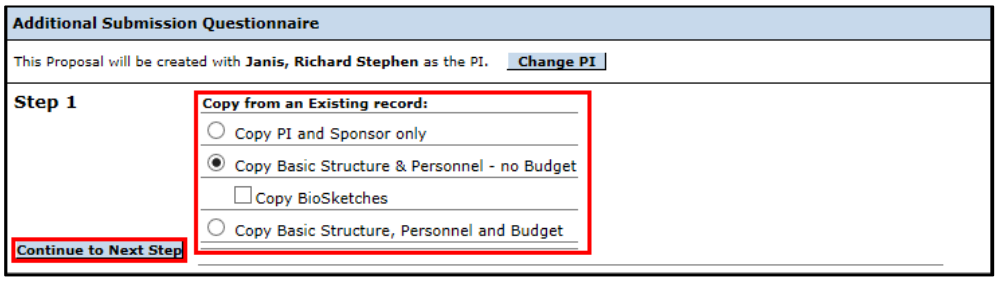
- **Proposal Number**
- **Sponsor/Scheme** (Name)
- **PI** (Last Name)
- **Legacy Number**
- **Proposal Status**
- **Primary Assoc Dept.**

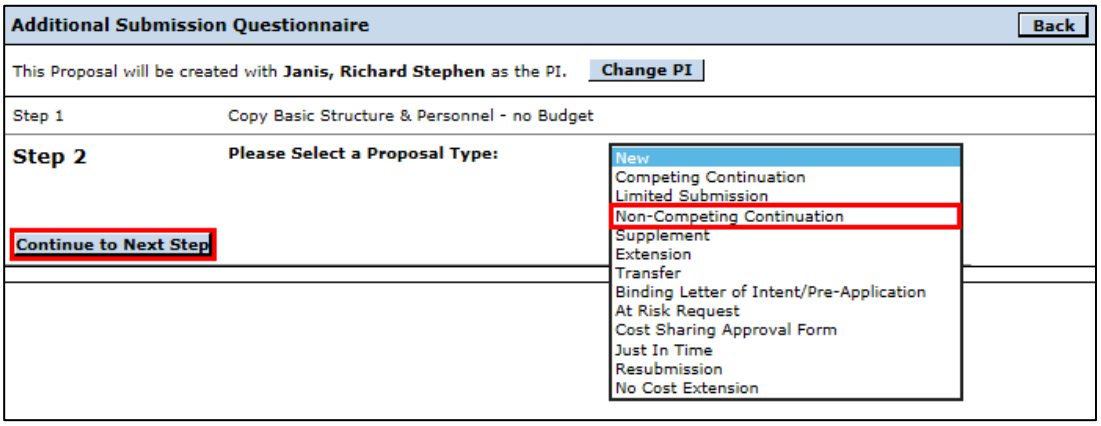
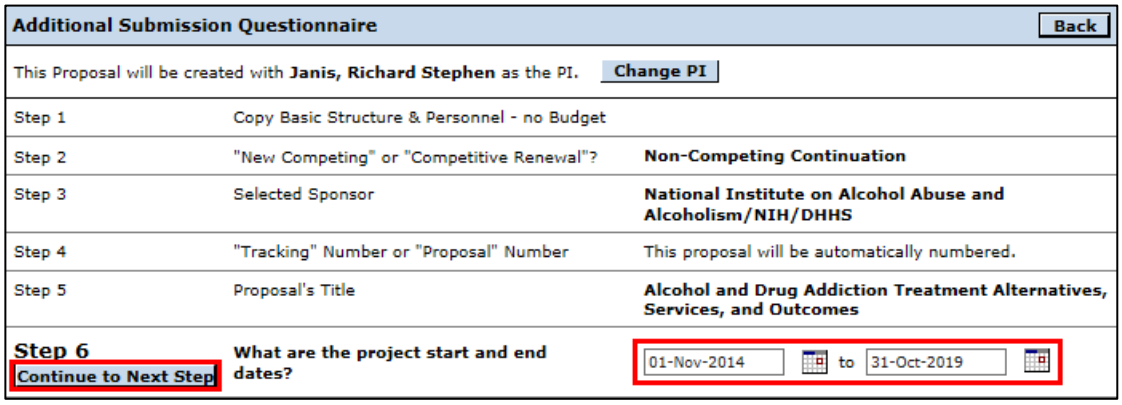
Click **Locate**.



Note: *Use the wildcard (*) symbol to replace unknown values. Place the wildcard at the beginning or end of the information entered only in non-Progressive Search fields, i.e. Proposal Number and Legacy Number fields.*

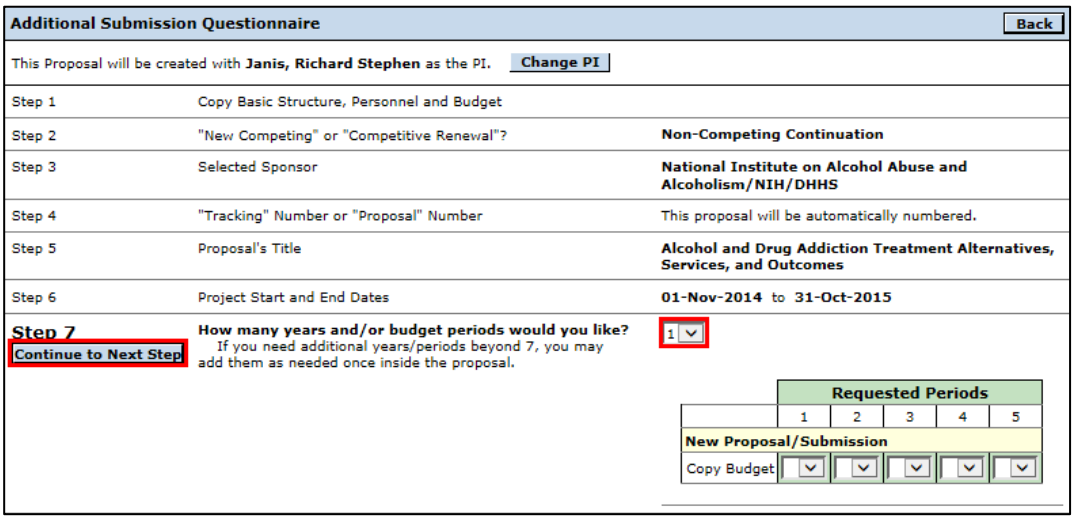
3	All results matching your search criteria will display below. 
4	Scroll your mouse over the folder ( ) icon and the record menu bar will display. Click the **Edit PT Proposal** icon to open the PT Record. 
5	Click the **Add New PD** icon located in the proposal tree. 

6	The **Additional Submission Questionnaire** screen will display. Click the **Change PI** button.  The **Personnel** window will display. 1. Enter the Principal Investigator's (PI) last name in the Progressive Search field. 2. Use the drop down menu to select the correct PI. 3. Click **Select**. 
7	The PI's name will display. 1. Select the appropriate radio button to indicate what information will copy into the child record.  2. Click **Continue to Next Step**. 

8	Select the **Non-Competing Continuation** option from the **Please Select a Proposal Type** drop down menu. Click **Continue to Next Step**. 
9	Use the **Show Calendar** icons to modify the project **Start Date** and **End Date** to match the Non-Competing Budget Period. *(These fields auto-populate.)* Click **Continue to Next Step**. 

10

1. Verify that the information entered for **Step # 0 – 7** is correct.
2. Verify that the number of years/periods listed is correct.
3. Click **Continue to Next Step**.



Additional Submission Questionnaire Back

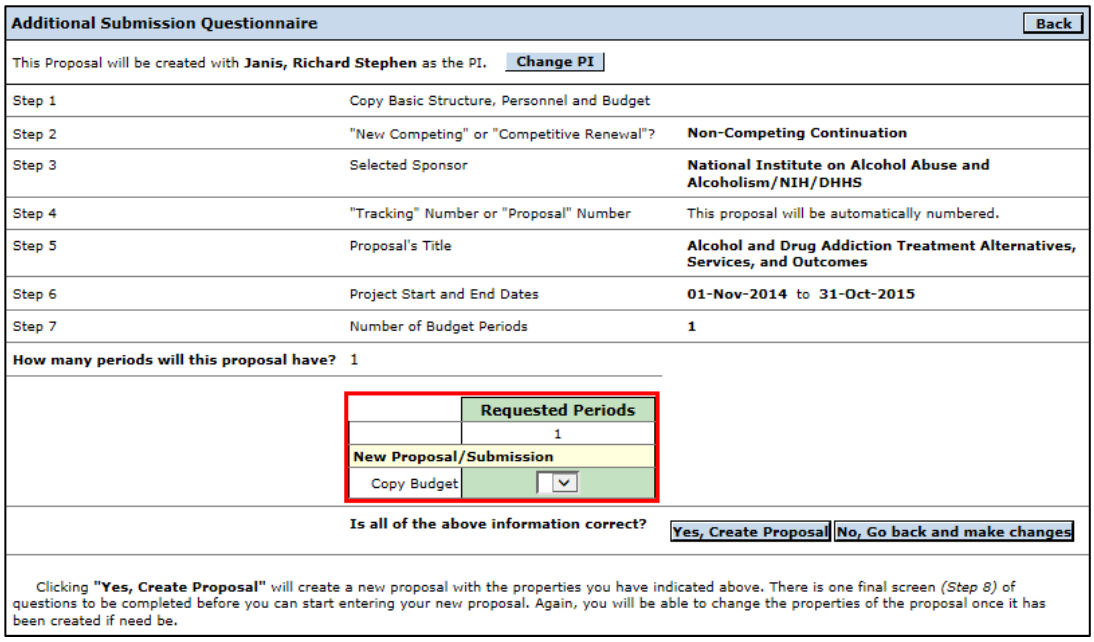
This Proposal will be created with **Janis, Richard Stephen** as the PI. Change PI

Step 1	Copy Basic Structure, Personnel and Budget	
Step 2	"New Competing" or "Competitive Renewal"?	**Non-Competing Continuation**
Step 3	Selected Sponsor	**National Institute on Alcohol Abuse and Alcoholism/NIH/DHHS**
Step 4	"Tracking" Number or "Proposal" Number	This proposal will be automatically numbered.
Step 5	Proposal's Title	**Alcohol and Drug Addiction Treatment Alternatives, Services, and Outcomes**
Step 6	Project Start and End Dates	**01-Nov-2014** to **31-Oct-2015**
Step 7 Continue to Next Step	**How many years and/or budget periods would you like?** If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.	1

	Requested Periods				
	1	2	3	4	5
New Proposal/Submission					
Copy Budget					

11

Navigate to the **Requested Periods** column (if the copy budget option was previously selected) that corresponds to the budget period you want to copy. Use the **Copy Budget** drop down menu to select the appropriate **Period/Budget**.



Additional Submission Questionnaire Back

This Proposal will be created with **Janis, Richard Stephen** as the PI. Change PI

Step 1	Copy Basic Structure, Personnel and Budget	
Step 2	"New Competing" or "Competitive Renewal"?	**Non-Competing Continuation**
Step 3	Selected Sponsor	**National Institute on Alcohol Abuse and Alcoholism/NIH/DHHS**
Step 4	"Tracking" Number or "Proposal" Number	This proposal will be automatically numbered.
Step 5	Proposal's Title	**Alcohol and Drug Addiction Treatment Alternatives, Services, and Outcomes**
Step 6	Project Start and End Dates	**01-Nov-2014** to **31-Oct-2015**
Step 7	Number of Budget Periods	**1**
How many periods will this proposal have?	1	

	Requested Periods
	1
New Proposal/Submission	
Copy Budget	

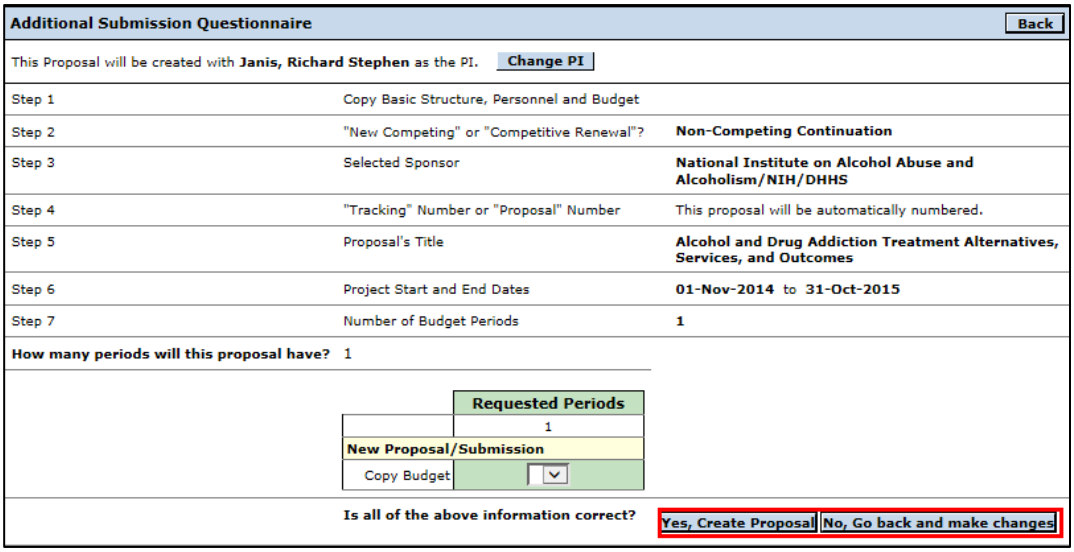
Is all of the above information correct? Yes, Create Proposal | No, Go back and make changes

Clicking **"Yes, Create Proposal"** will create a new proposal with the properties you have indicated above. There is one final screen *(Step 8)* of questions to be completed before you can start entering your new proposal. Again, you will be able to change the properties of the proposal once it has been created if need be.

12 Click the **No, Go back and make changes** button to edit a specific section.

OR

Click the **Yes, Create Proposal** button to create a new proposal with the information entered.



Additional Submission Questionnaire Back

This Proposal will be created with **Janis, Richard Stephen** as the PI. Change PI

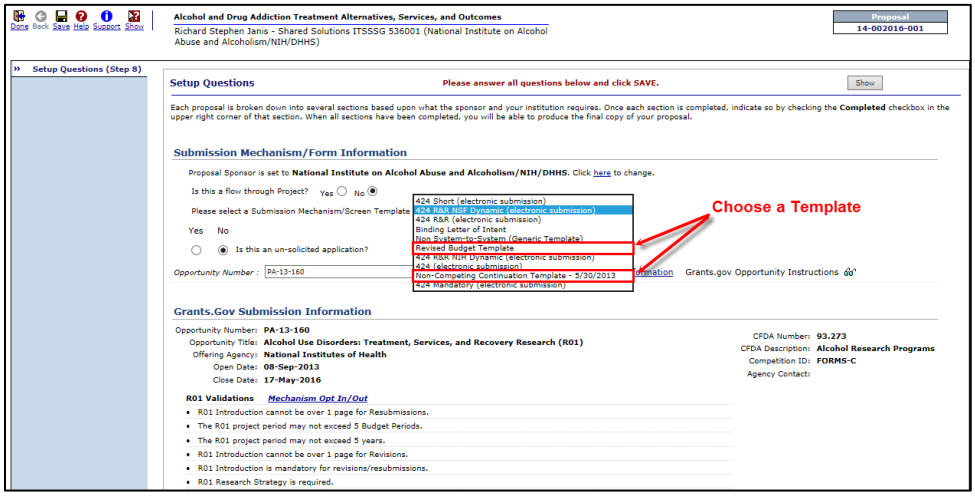
Step 1	Copy Basic Structure, Personnel and Budget	
Step 2	"New Competing" or "Competitive Renewal"?	**Non-Competing Continuation**
Step 3	Selected Sponsor	**National Institute on Alcohol Abuse and Alcoholism/NIH/DHHS**
Step 4	"Tracking" Number or "Proposal" Number	This proposal will be automatically numbered.
Step 5	Proposal's Title	**Alcohol and Drug Addiction Treatment Alternatives, Services, and Outcomes**
Step 6	Project Start and End Dates	**01-Nov-2014** to **31-Oct-2015**
Step 7	Number of Budget Periods	**1**
How many periods will this proposal have?	1	

	Requested Periods
	1
New Proposal/Submission	
Copy Budget	

Is all of the above information correct? Yes, Create Proposal | No, Go back and make changes

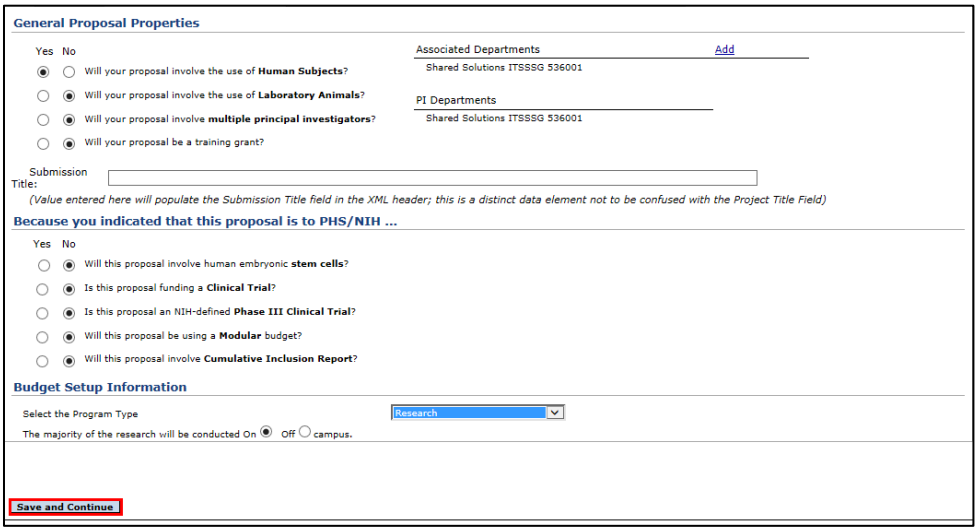
13 Complete the following sections on the **Setup Questions** screen:

- **Submission Mechanism/Form Information** *(choose the appropriate template)*
  - **Revised Budget Template** – *a budget is being submitted to the sponsor (Navigate to Page #8 to view instructions.)*
  - **Non-Competing Continuation Template** – *no budget is being submitted to the sponsor (Navigate to Page #10 to view instructions.)*



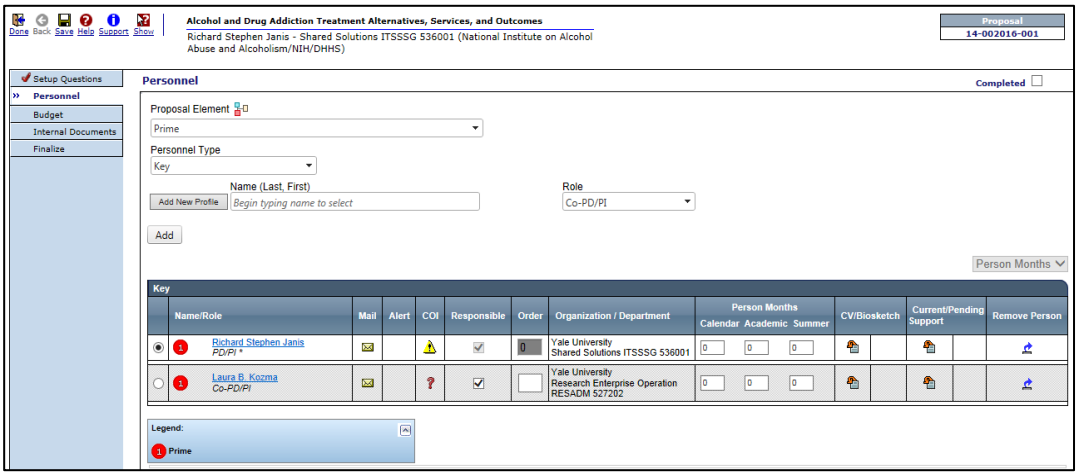
- **Grants.Gov Submission Information** *(if applicable)*
- **Deadline Information Section**
- **General Proposal Properties Section**
- **Budget Setup Information**

Click **Save and Continue**.

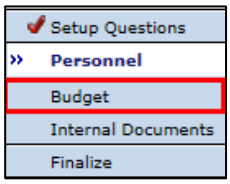


Revised Budget Template

1 Upon clicking the **Save and Continue** button, the **Personnel Tab** will display.



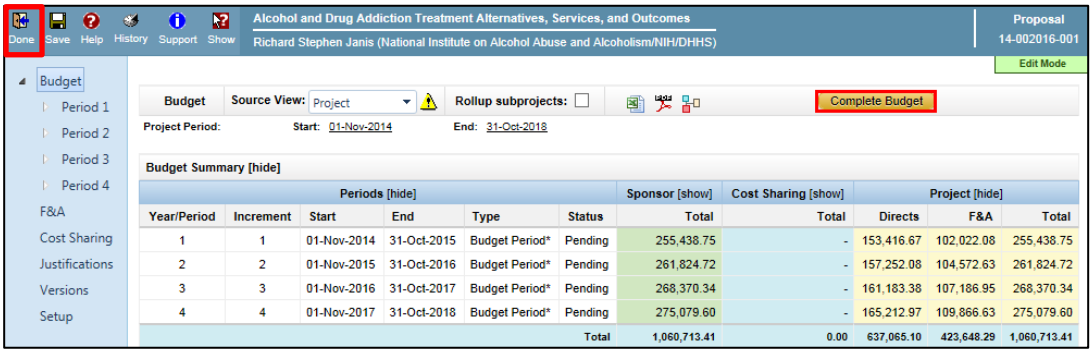
2 Click on the **Budget** tab to modify personnel effort and budget details.



3 The **Budget Summary** screen will display.

Refer to the **<u>Entering Budget Costs</u>** guide for information on how to complete the budget tab.

4 Verify that all costs are entered accuratly, adjust if necessary, then click the **Complete Budget** button on the **Budget Summary** screen. Click **Done** to close the budget screen/window.

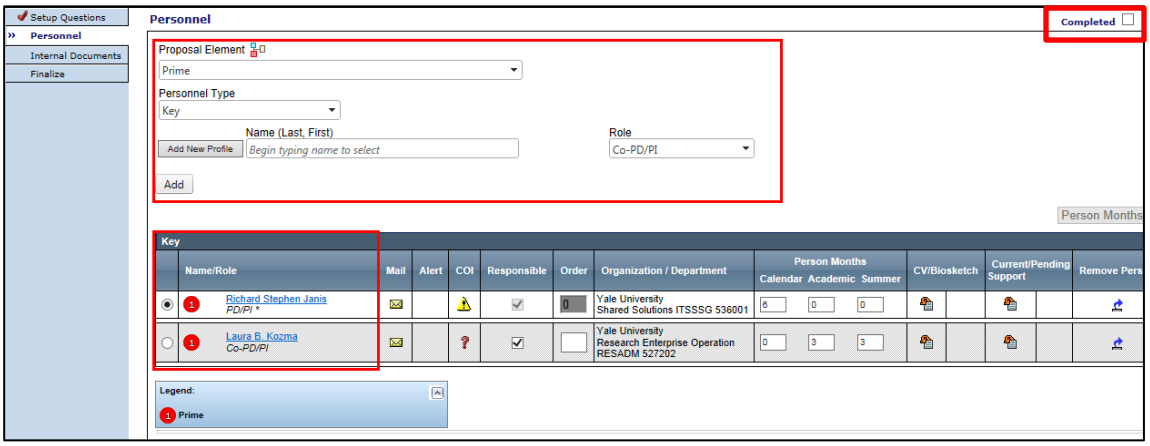


To complete and submit the proposal to the route for review and approval, continue with **Step 1** outlined in the Non-Competing Continuation Template section below.

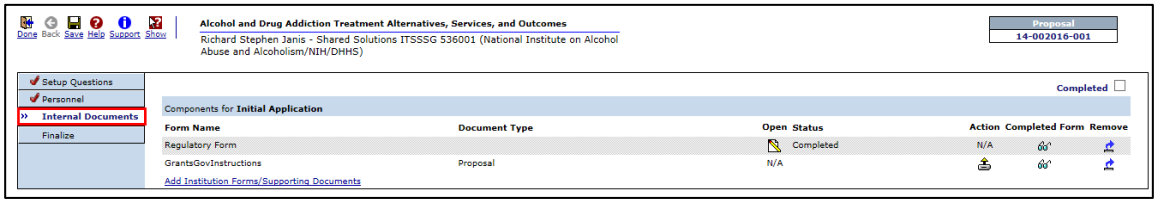
Non-Competing Continuation (NCC) Template

1 Upon clicking the **Save and Continue** button, the **Personnel** tab will display.

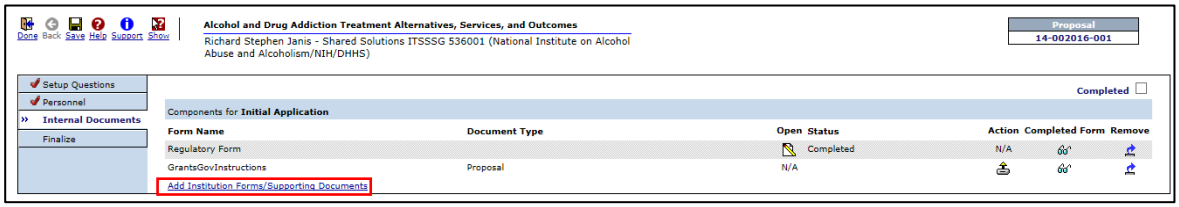
Review the personnel and add or remove key and responsible personnel (*see* ***Adding Personnel*** *and* ***Understanding Personnel Types*** *for additional information*). Complete the **Personnel tab**.

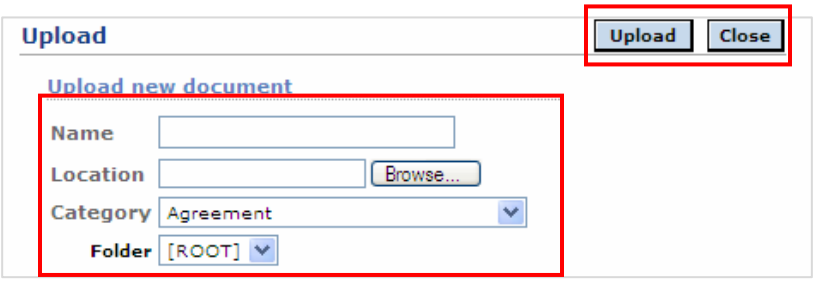


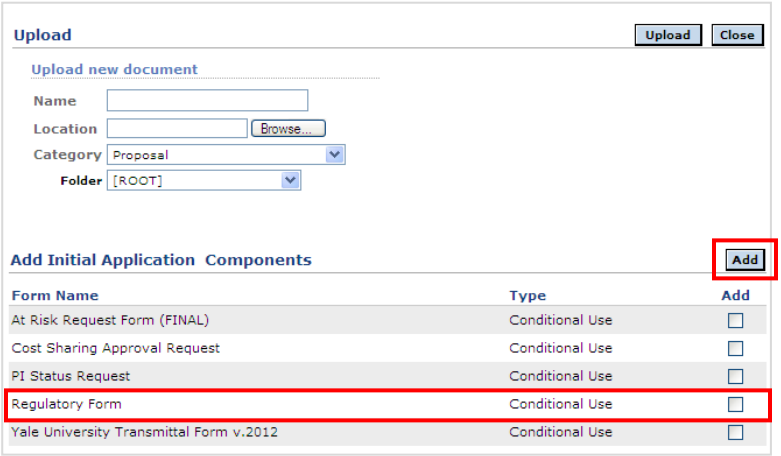
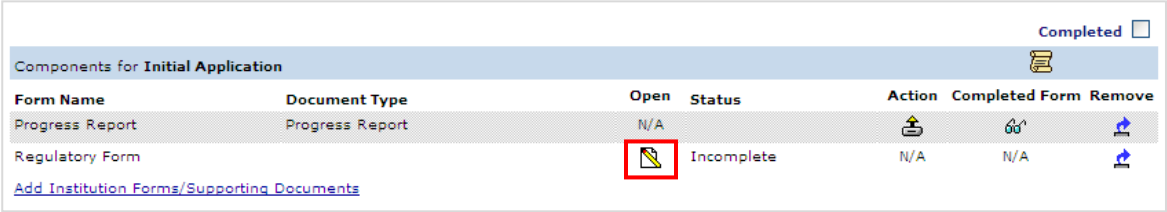
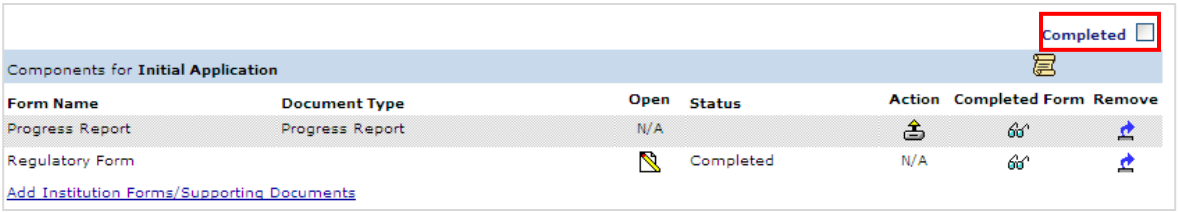
2 Navigate to the **Internal Documents** tab.



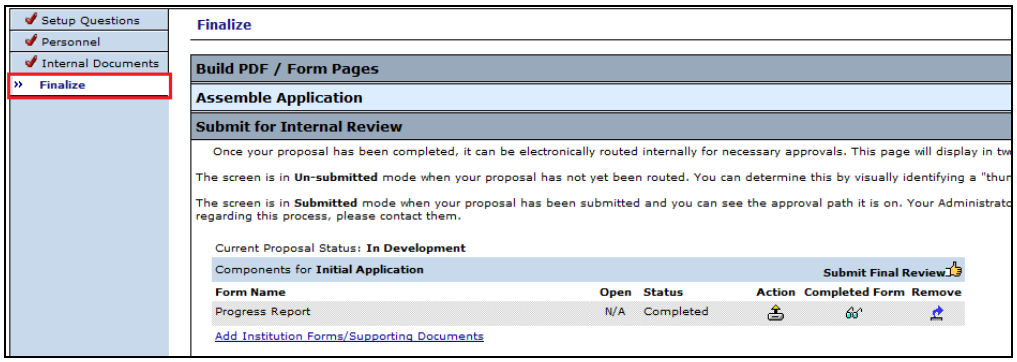
3 Click the **Add Institution Forms/Supporting Documents** link.

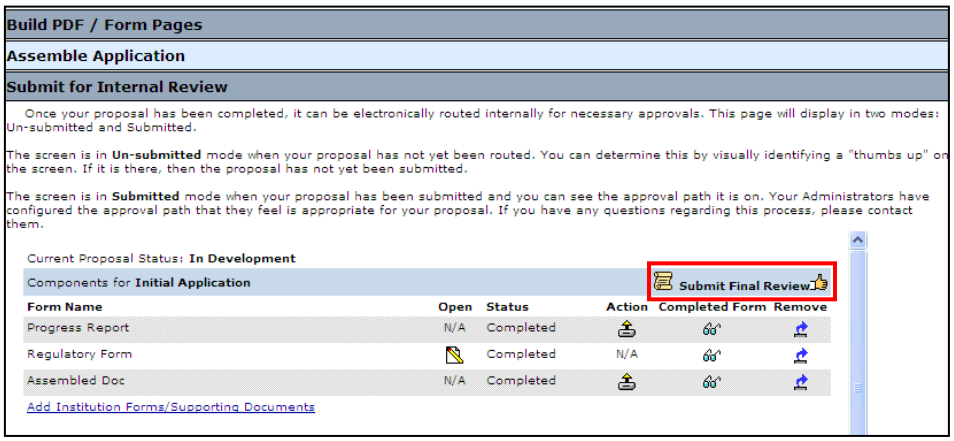


4	The **Add Components** screen will appear. To upload the **Progress Report** document, navigate to the **Upload** section of the screen. 1. Enter the name of the document in the **Name** field. 2. Click **Browse** to search for the document on your hard drive. Locate and select the appropriate document. 3. Use the drop down menu to select the document **(Progress Report) Category**. 4. Use the drop down menu to select the appropriate **(General) Folder**. 5. Click the **Upload** button to attach the document to the PD Record. 6. Click the **Close** button. 

5	To add the **Regulatory Form** e-Form, navigate to the **Add Initial Application Components** section (located at the bottom) of the **Add Components** screen. 1. Click the check box next to the **Regulatory Form** e-Form. 2. Click **Add** to create the e-Form. 
6	To access the e-form, click the **Open** icon to view or edit the e-Form. Navigate through the various sections of the e-form and complete all required data entry based on information provided by the PI. 
7	Click the **Completed** check box. 

8	Click the **Finalize** tab.
9	The **Submit for Internal Review** section will display. Click the **Submit Final Review** icon. Refer to ***Finalizing and Submitting a Non-S2S Proposal*** for more information.



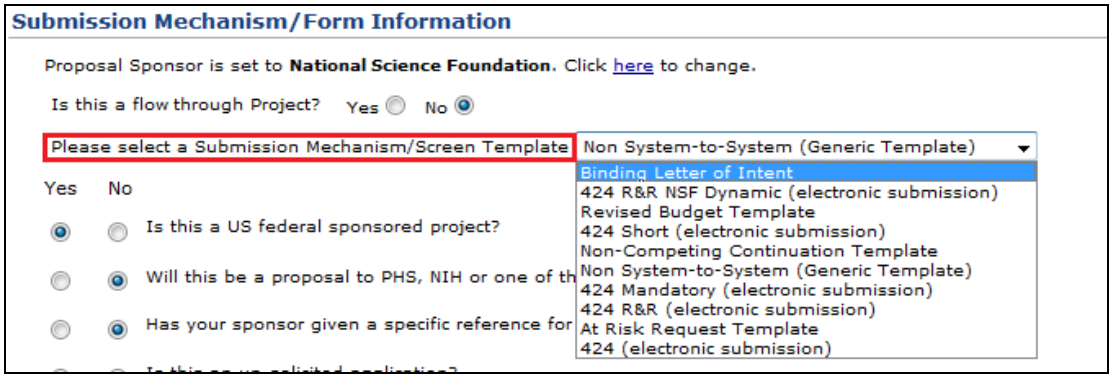


IRES

Submission Mechanism/Screen Template Matrix

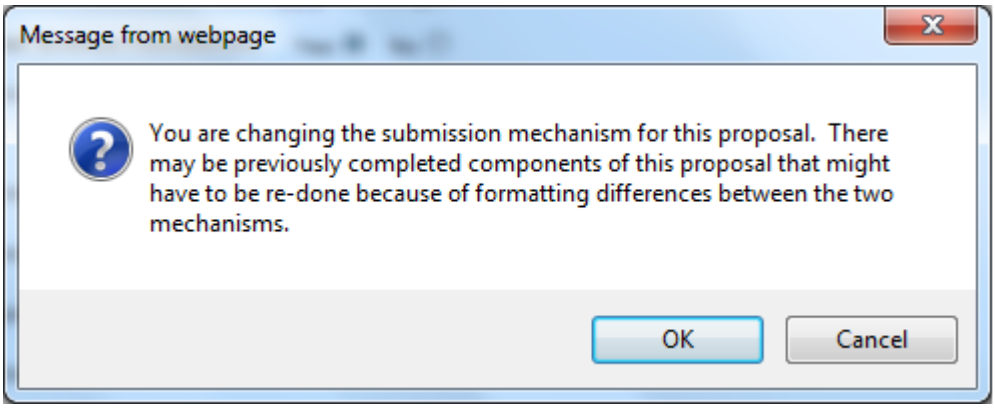
This guide provides a matrix of what Submission Mechanism/Screen Template should be selected.

1 After initiating a proposal (*See* ***Creating a Proposal Shell S2S*** *or* ***Creating a Proposal Shell Non-S2S***) navigate to the **Submission Mechanism/Screen Template** question on the **Setup Questions** tab:



2 Select the appropriate **Submission Mechanism/Screen Template** based on the **Proposal Type**

Proposal Type	Submission Mechanism/Screen Template
System-to-System (S2S) Proposals	
New	Appropriate template will be selected by the system
Limited Submission	Appropriate template will be selected by the system
Competing Continuation	Appropriate template will be selected by the system
Resubmission (copied previous record)	Template will copy from original submission
Resubmission (did not copy previous record)	Appropriate template will be selected by the system
Supplement	Appropriate template will be selected by the system
Non System-to-System (Non-S2S) Proposals	
New	Non System-to-System (Generic Template)
Limited Submission	Non System-to-System (Generic Template)
Competing Continuation	Non System-to-System (Generic Template)
Extension	Non System-to-System (Generic Template)
Transfer	Non System-to-System (Generic Template)
Resubmission	Non System-to-System (Generic Template)
Supplement	Non System-to-System (Generic Template)
Binding Letter of Intent	Binding Letter of Intent
Non System-to-System (Non-S2S) Other	
Non-Competing Continuation (NIH Progress Report)	Revised Budget Template or Non-Competing Continuation Template (*See* ***Creating a Non-Competing Contination Proposal***)
Revised Budget (use JIT proposal type)	Revised Budget Template

3	Click **OK** to the pop-up message: 

Understanding Parent/Master and Child Records

This guide provides a matrix of what proposal types are parent record and what proposal types are child records.

1 Initiate the proposal as either a **Parent/Master** or **Child of a Parent/Master** record based on the matrix below:

Proposal Type	Parent/Master or Child Record
New	Parent/Master
Competing Continuation	Parent/Master
Limited Submission	N/A – not utilized in PD
Non-Competing Continuation	Child of a Parent/Master
Supplement	Child of a Parent/Master
Extension	Child of a Parent/Master
Transfer	N/A – not utilized in PD
Binding Letter of Intent/Pre-Application	Parent/Master
At Risk Request	N/A – not utilized in PD
Cost Sharing Approval Form	N/A – not utilized in PD
Just In Time*	Child of a Parent/Master
Resubmission	Parent/Master
No Cost Extension	N/A – not utilized in PD

*applicable only to **revised budgets**. Just in Time/JITs submitted to NIH without a budget are not submitted through PD