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.
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.

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.**

9  **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.
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.
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.

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.
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-12-160
Opportunity Title: Alcohol Use Disorder: Treatment, Services, and Recovery Research (RO1)
Offering Agency: National Institutes of Health

<table>
<thead>
<tr>
<th>Grants.Gov Submission Information</th>
<th>CFDA Number: 93.273</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validation Requirements</td>
<td>CFDA Description: Alcohol Research Programs</td>
</tr>
<tr>
<td>RO1 Validations</td>
<td>Competition ID: FORMS-S</td>
</tr>
<tr>
<td>Mechanism: Nat/Ind/Out</td>
<td>Form Version: FORMS-C</td>
</tr>
<tr>
<td>RO1 Introduction cannot be over 1 page for Resubmissions.</td>
<td>Agency Contact:</td>
</tr>
<tr>
<td>The RO1 project period may not exceed 5 Budget Periods.</td>
<td></td>
</tr>
<tr>
<td>The RO1 project period may not exceed 5 years.</td>
<td></td>
</tr>
<tr>
<td>RO1: Introduction cannot be over 1 page for Resubmissions.</td>
<td></td>
</tr>
<tr>
<td>RO1: Introduction is mandatory for revisions/resubmissions.</td>
<td></td>
</tr>
<tr>
<td>RO1: Research Strategy is required.</td>
<td></td>
</tr>
<tr>
<td>RO1: Specific Aim is required and limited to 1 page.</td>
<td></td>
</tr>
<tr>
<td>NIH Annual $500,000 direct cost limit applies to the proposal.</td>
<td></td>
</tr>
<tr>
<td>RO1: Research Strategy page limit is 12 pages.</td>
<td></td>
</tr>
<tr>
<td>For RO1 submission a non-zero value for calendar months, academic months, or summer months is required for each senior/key person.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Version</th>
<th>Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>RO1_ApplicantProfile_1_0</td>
<td>RO1_ApplicantProfile_1_0-v2.0</td>
<td>✓</td>
</tr>
<tr>
<td>RO1_CoverPage_1_0</td>
<td>RO1_CoverPage_1_0-v2.0</td>
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<td>RO1_CoverPageSupplement_1_0</td>
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<td>RO1_SiteVisitBudget_1_0</td>
<td>RO1_SiteVisitBudget_1_0-v1.3</td>
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</tr>
<tr>
<td>FormsReport</td>
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</tr>
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<td>RO1_CumulativeInstitutionReport</td>
<td>RO1_CumulativeInstitutionReport-v1.0</td>
<td>✓</td>
</tr>
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<td>RO1_HorizontalBudget_1_0</td>
<td>RO1_HorizontalBudget_1_0-v1.2</td>
<td>✓</td>
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<tr>
<td>RO1_Budget_1_0</td>
<td>RO1_Budget_1_0-v1.3</td>
<td>✓</td>
</tr>
</tbody>
</table>
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.)*

<table>
<thead>
<tr>
<th>Deadline Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yes</strong></td>
</tr>
<tr>
<td><strong>Is there a Deadline for this Submission?</strong></td>
</tr>
<tr>
<td><strong>Deadline Type:</strong> Electronic</td>
</tr>
<tr>
<td><strong>Deadline Date:</strong> 02/28/2014</td>
</tr>
<tr>
<td><strong>Deadline Time:</strong> 2:00:00 PM</td>
</tr>
<tr>
<td><strong>Deadline Time Zone:</strong> GMT-5:00 Eastern Standard Time</td>
</tr>
</tbody>
</table>

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 Owing Org.
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.

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

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

![Create New Proposal Window]

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.

![Personnel Window]

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.

![New Proposal Questionnaire]

4/25/2014 5:06 PM
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**.
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.

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

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

<table>
<thead>
<tr>
<th>Step 0 Configuration</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirm you intend for the PI of this proposal to be Janis, Richard Stephen - or - Change PI now please</td>
<td>Is all of the above information correct? Yes, Create Proposal  No, Go back and make changes</td>
</tr>
</tbody>
</table>

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.

![Submission Mechanism/Screen Template](image)

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.*
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.)*

![Deadline Information](image)

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 Owning Org.

![General Proposal Properties](image)
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.

Click Save and Continue.
Creating a Child Record Proposal

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 ( 文件 ) 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.

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.

![Additional Submission Questionnaire](image)

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**.

![Additional Submission Questionnaire](image)

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**.

10. 1. Verify that the number of years/periods listed is correct.

2. Click **Continue to Next Step**.

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.
11. 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.*

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.
### 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**.

![Budget Setup Information](image)

---

<table>
<thead>
<tr>
<th></th>
<th>Upon clicking the <strong>Save and Continue</strong> button, the <strong>Internal Documents</strong> tab will display. Click the <strong>Add Institution Forms/Supporting Documents</strong> link.</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add Institution Forms/Supporting Documents" /></td>
<td></td>
</tr>
</tbody>
</table>
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.

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**

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.**

![InfoEd](image)

4. **Scroll your mouse over the folder ( 文件夹) icon and the record menu bar will display.**

Click the **Edit PT Proposal** icon to open the PT Record.

![Edit PT Proposal](image)

5. **Click the **Add New PD** icon located in the proposal tree.**

![Add New PD](image)
The Additional Submission Questionnaire screen will display.

Click the Change PI button.

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.

The Personnel window 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**.

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**.
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Copy Basic Structure, Personnel and Budget</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td><strong>“New Competing” or “Competitive Renewal?”</strong></td>
<td>Non-Competing Continuation</td>
</tr>
<tr>
<td>3</td>
<td><strong>Selected Sponsor</strong></td>
<td>National Institute on Alcohol Abuse and Alcoholism/NIH/NIHES</td>
</tr>
<tr>
<td>4</td>
<td><strong>“Tracking” Number or “Proposal” Number</strong></td>
<td>This proposal will be automatically numbered.</td>
</tr>
<tr>
<td>5</td>
<td><strong>Proposal’s Title</strong></td>
<td>Alcohol and Drug Addiction Treatment Alternatives, Services, and Outcomes</td>
</tr>
<tr>
<td>6</td>
<td><strong>Project Start and End Dates</strong></td>
<td>01-Nov-2014 to 31-Oct-2015</td>
</tr>
<tr>
<td>7</td>
<td><strong>Number of Budget Periods</strong></td>
<td>1</td>
</tr>
</tbody>
</table>

**How many periods will this proposal have?** 1

**Requested Periods**

<table>
<thead>
<tr>
<th>New Proposal/Submission</th>
<th>Copy Budget</th>
</tr>
</thead>
</table>

**Is all of the above information correct?** Yes, Create Proposal  No, Go back and make changes
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 **Entering Budget Costs** guide for information on how to complete the budget tab.

4. Verify that all costs are entered accurately, 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.
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.
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.

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.

Click the Completed check box.
8. Click the **Finalize** tab.

![Finalize tab](image)

9. The **Submit for Internal Review** section will display. Click the **Submit Final Review** icon.

<table>
<thead>
<tr>
<th>Build PDF / Form Pages</th>
<th>Assemble Application</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Submit for Internal Review</strong></td>
<td></td>
</tr>
</tbody>
</table>
| Once your proposal has been completed, it can be electronically routed internally for necessary approvals. This page will display in two modes: Un-submitted and Submitted.

The screen is in Un-submitted mode when your proposal has not yet been routed. You can determine this by visually identifying a "thumbs up" in the screen. If it is there, then the proposal has not yet been submitted.

The screen is in Submitted mode when your proposal has been submitted and you can see the approval path it is on. Your Administrators have configured the approval path that they feel is appropriate for your proposal. If you have any questions regarding this process, please contact them.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Open Status</th>
<th>Action</th>
<th>Completed Form Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress Report</td>
<td>N/A</td>
<td>Completed</td>
<td>![Completion Icon]</td>
</tr>
<tr>
<td>Regulatory Form</td>
<td>![Completion Icon]</td>
<td>N/A</td>
<td>![Completion Icon]</td>
</tr>
<tr>
<td>Assembled Cost</td>
<td>![Completion Icon]</td>
<td>N/A</td>
<td>![Completion Icon]</td>
</tr>
</tbody>
</table>

Refer to **Finalizing and Submitting a Non-S2S Proposal** for more information.
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:

![Submission Mechanism/Form Information](image)

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

<table>
<thead>
<tr>
<th>Proposal Type</th>
<th>Submission Mechanism/Screen Template</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System-to-System (S2S) Proposals</strong></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Appropriate template will be selected by the system</td>
</tr>
<tr>
<td>Limited Submission</td>
<td>Appropriate template will be selected by the system</td>
</tr>
<tr>
<td>Competing Continuation</td>
<td>Appropriate template will be selected by the system</td>
</tr>
<tr>
<td>Resubmission (copied previous record)</td>
<td>Template will copy from original submission</td>
</tr>
<tr>
<td>Resubmission (did not copy previous record)</td>
<td>Appropriate template will be selected by the system</td>
</tr>
<tr>
<td>Supplement</td>
<td>Appropriate template will be selected by the system</td>
</tr>
<tr>
<td><strong>Non System-to-System (Non-S2S) Proposals</strong></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Non System-to-System (Generic Template)</td>
</tr>
<tr>
<td>Limited Submission</td>
<td>Non System-to-System (Generic Template)</td>
</tr>
<tr>
<td>Competing Continuation</td>
<td>Non System-to-System (Generic Template)</td>
</tr>
<tr>
<td>Extension</td>
<td>Non System-to-System (Generic Template)</td>
</tr>
<tr>
<td>Transfer</td>
<td>Non System-to-System (Generic Template)</td>
</tr>
<tr>
<td>Resubmission</td>
<td>Non System-to-System (Generic Template)</td>
</tr>
<tr>
<td>Supplement</td>
<td>Non System-to-System (Generic Template)</td>
</tr>
<tr>
<td>Binding Letter of Intent</td>
<td>Binding Letter of Intent</td>
</tr>
<tr>
<td><strong>Non System-to-System (Non-S2S) Other</strong></td>
<td></td>
</tr>
<tr>
<td>Non-Competing Continuation (NIH Progress Report)</td>
<td>Revised Budget Template or Non-Competing Continuation Template (See Creating a Non-Competing Continuation Proposal)</td>
</tr>
<tr>
<td>Revised Budget (use JIT proposal type)</td>
<td>Revised Budget Template</td>
</tr>
</tbody>
</table>
3  |  Click **OK** to the pop-up message:

![Message from webpage](image)

You are changing the submission mechanism for this proposal. There may be previously completed components of this proposal that might have to be re-done because of formatting differences between the two mechanisms.
This guide provides a matrix of what proposal types are parent record and what proposal types are child records.

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

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