

Research Administration & Proposal Submission System (RAPSS) Proposal Team Quick Reference

This document is intended for the proposal team.

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Software Overview and Basic Navigation

When you first log in, you will be on your My Inbox page. You can always get back to this page by clicking My Inbox in the top right.

Navigate My Inbox

From My Inbox, you will find:

1. **Logout** link to exit the system.
2. **Tabs** listing your funding proposals in various stages of the process. The text at the top of the page describes the tabs.
3. Your **Role**. If you have more than one role, select the Proposal Team role under My Roles. Roles determine what appears in My Inbox as well as your access to proposals, actions, and activities in the system.
4. **Buttons** or **Links** to which your role has access, for example, a button to **Create Funding Proposal**.

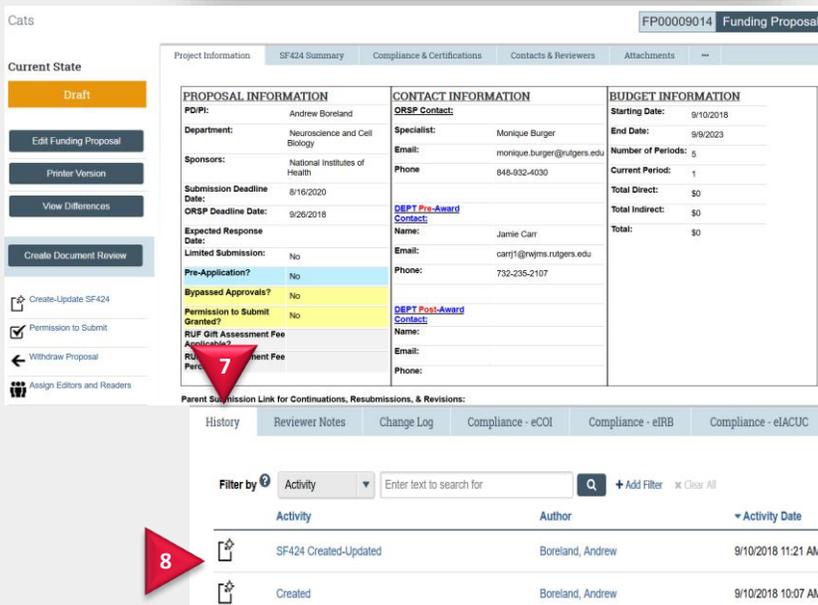
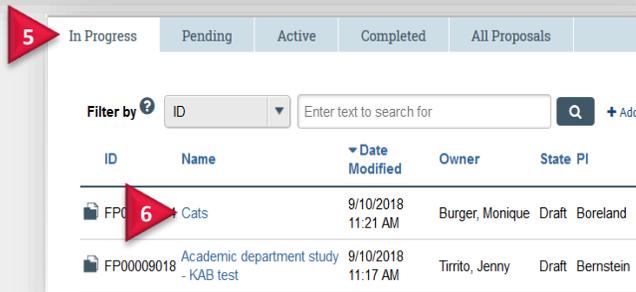
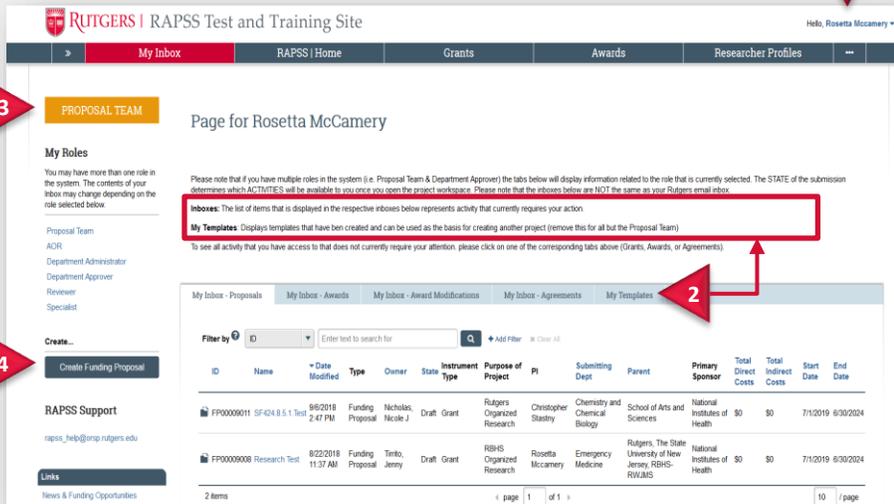
Open a Proposal

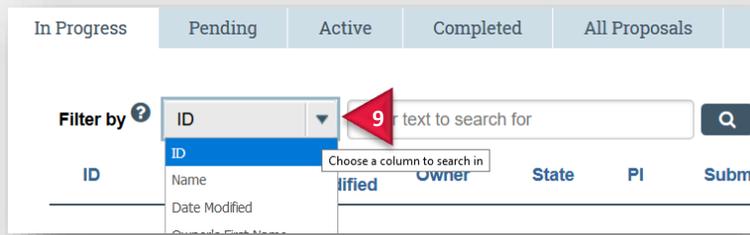
5. From the **Grants** tab, click the appropriate tab to see your proposals. To find a specific proposal, see [Filter Data in a Table](#).
6. Click the proposal name to open it.

The funding proposal workspace opens. See [Navigate Funding Proposal Workspace](#) for details.

View Proposal History

7. In the proposal workspace, click the **History** tab.
8. The history lists the activity taken on the proposal including any comments or attachments added.





Filter Data in a Table

To find a specific item in a table, use the Filter by feature:

9. Select the column to filter by.
10. Type the beginning characters for the items you want to find. You can also type a % symbol as a wildcard before the characters. For example:
 - FP shows all items beginning with FP
 - %FP0000 shows all items containing FP0000
11. For a list of operators you can type in the text box, click the Help icon.
12. Click **magnifying glass** to apply the filter.
13. To combine multiple filter criteria, click **Add Filter**.

1 Draft

2 Edit Funding Proposal
Printer Version
View Differences

3 Create Document Review
Create-Update SF424
Permission to Submit
Withdraw Proposal
Assign Editors and Readers
Add Attachments

4 Project Information | SF424 Summary | Compliance & Certifications | Contacts & Reviewers | Attachments | Agreements

5 DEPT REVIEWERS:
The following people will review this proposal and provide organizational approval for: Neuroscience and Cell Biology

6 Back | Continue

7 Save | Exit

8 Hide/Show Errors

8a Error/Warning Messages

Message	Field Name	Jump To
This is a required field; therefore, you must provide the required information.	Status	5.2 Animal Subjects (IACUC)
This is a required field; therefore, you must provide the required information.	Is animal work being conducted under subcontract?	5.2 Animal Subjects (IACUC)

9 Jump To

- General Information
- 1.0 Proposal Description & Contacts
- 3.0 Research Department
- 4.0 General Proposal Information
- 4.1.b Purpose of the Project: RBHS on Campus
- 5.0 Compliance Review
- 5.2 Animal Subjects (IACUC)
- 5.3 Biohazardous, Toxins, Pathogens, RDNA, Hur
- 6.0 Export Control

10 Save & Exit

Navigate Funding Proposal Workspace

When you open a proposal, you will see the proposal workspace:

- 1.** The **State** of the proposal in the process. For example, Draft means the proposal has not been submitted for review.
- 2.** **Buttons** for activities related to proposal pages such as edit, view, or print pages, depending on your role.
- 3.** **Actions** you can perform in the current state.
- 4.** **Tabs** of information related to the proposal, SF424, and review.
- 5.** The **Contacts and Reviewers** tab lists the reviewers and approvers for the proposal.

Navigate Funding Proposal Pages

A navigation bar appears at the top and bottom of each proposal page:

- 6.** **Back** and **Continue** move you backward and forward through the pages. Continue saves your entries; Back does not.
- 7.** **Save** saves your entries and **Exit** returns you to the proposal workspace. Save only appears if you can edit the proposal.
- 8.** **Hide/Show Errors** shows a pane at the bottom of the page listing all pages with errors. If you can edit the proposal, you can fix the errors as follows:
 - Click the **Jump To** link to go to that page and fix the error.
 - Click **Refresh** to update the messages.
- 9.** **Jump To** menu lists all the proposal pages. Select a page to jump to it.
- 10.** **Save & Exit** on the last page saves your proposal and returns you to the proposal workspace.

Create a Funding Proposal

If you have more than one role in the system, select the **Proposal Team** role under My Roles to create a funding proposal.

1 Select the **PROPOSAL TEAM** role in the **My Roles** dropdown menu.

2 Click the **Create Funding Proposal** button.

3 Navigate to the **1.0 Project Description & Contacts** page.

4 Click the **Save & Exit** button.

5 Review the **Current State** of the proposal, which is in **Draft** status.

6 Click **Create-Update SF424** and **Permission to Submit**.

7 Click **Submit for Departmental Review**.

8 Check the box to agree to the endorserments.

9 Click **OK** to complete the submission.

Create the Proposal

1. From the My Inbox page, click **Create Funding Proposal**.
2. Complete the pages. Click **Continue** to move through the pages.
3. Click **Hide/Show Errors** to validate the proposal. To correct errors, see [Navigate Funding Proposal Pages](#).

4. On the final page, click **Save & Exit**.

You can continue to edit the proposal (Edit Funding Proposal button on the workspace) until the **PI** submits it for review.

5. **Only if applicable**, create the SF424 application. See [Create or Update the SF424 Application](#).
6. If the proposal is complete, including all documents and final science, see [Grant Permission to Submit Proposal to Sponsor](#). If not, you will need to perform this step before your proposal can be submitted to the sponsor.

Submit the Proposal for Review

After you have created the proposal and SF424 application, **only the PI** can submit the proposal for internal review.

7. From the funding proposal workspace, click **Submit for Departmental Review**.
8. Click the check box to agree to the statements.
9. Click **OK**.

You can continue to update your SF424 while the proposal is in review.

Create or Update the SF424 Application

Generally, you will create the SF424 application prior to submitting the funding proposal for review.

Warning: Once created, any manual updates you make to mapped fields in the SF424 application will be overwritten if you recreate the SF424 application. To update an existing SF424 application, see [Update the SF424 Application](#).

The screenshot illustrates the process of creating or updating an SF424 application. It shows a table of existing applications, a list of forms to be included, a summary page with application information, and a selection screen for optional and required forms. Red callout boxes with numbers 1 through 10 indicate the sequence of steps: 1. Selecting an application in the table; 2. Clicking the 'Create-Update SF424' button; 3. Selecting forms in the list; 4. Clicking 'OK'; 5. Viewing the 'SF424 INFORMATION' summary; 6. Clicking the SF424 ID link; 7. Clicking 'Edit Grant Application'; 8. Selecting optional forms; 9. Selecting required forms; 10. Clicking 'Save'.

Create the SF424 Application

1. Open the funding proposal.
2. From the proposal workspace, click **Create-Update SF424**.
3. Select the forms you want to include in the SF424 application.
4. Click **OK**. The SF424 is created, populated with data from your funding proposal.

Update the SF424 application with any missing data (steps below).

Update the SF424 Application

5. From the proposal workspace, click the **SF424 Summary** tab.
6. Click the SF424 ID link.
7. In the SF424 workspace, click **Edit Grant Application**.
8. To add an optional form, select the form check box and then click **Continue** to update the form.
9. To update an existing form, click the link and make the changes.
10. To continue working on the form click **Continue**. When done updating a form, click **Save** and then **Exit** to return to the SF424 workspace.

When finished filling out the SF424 application, go to [Validate the SF424 Data](#).

The screenshot shows a web interface with two tabs: "Project Information" and "SF424 Summary". The "SF424 Summary" tab is active and displays "SF424 INFORMATION". The information includes:

SF424 Link to Form:	SF-42400002337
SF424 Tracking#:	
SF424 Received Date/Time:	
SF424 Status Updated:	
SF424 Current State:	Pre-Submission
PDF Version	TBD

Below the information is a vertical menu with the following options:

- Pre-Submission (highlighted in orange)
- Edit Grant Application
- Printer Version
- View Differences
- Validate Submission (with a refresh icon)

Callout 11 points to the "SF424 Summary" tab. Callout 12 points to the "SF424 Link to Form" field. Callout 13 points to the "Validate Submission" button.

Validate the SF424 Data

After you have filled in as much of the SF424 as possible, validate the form.

- 11.** From the funding proposal workspace, click the **SF424 Summary** tab.
- 12.** Click the SF424 ID link.
- 13.** In the SF424 workspace, click **Validate Submission**.

Fix any errors listed in the Error/Warning Messages pane by manually updating those pages. See [Update the SF424 Application](#). Click **Validate Submission** again to ensure no errors.

Grant Permission to Submit Proposal to Sponsor

Before a proposal can be submitted to the sponsor, it must include all required documents and the final science. If a proposal was not complete when it was submitted for department review, you can perform this step at any time up to and while the proposal is in the Specialist Review state.

In Progress	Pending	Active	Completed	All Proposals
Filter by [?] ID ▼ <input type="text" value="Enter text to search for"/> <input type="button" value="Q"/> <input type="button" value="+ Add"/>				
ID	Name	Date Modified	Owner	State PI
FP 1	4 Cats	9/10/2018 11:21 AM	Burger, Monique	Draft Boreland

Current State

Draft

Create-Update SF424

Permission to Submit

Permission to Submit

Permission to Submit

Execution of this activity certifies that the funding proposal is complete and you are granting the ORSP permission to submit to the sponsor.

ALL documents, including the FINAL technical/scientific components of the proposal (if applicable) have been attached.

ALL assurances and activities have been completed.

NOTE: If the Grant Specialist has executed the "Bypass Review & Approval" activity, it will automatically be considered that the technical/scientific components of the proposal (if applicable) are final.

* I am certifying that the proposal is complete and the ORSP may submit to the Sponsor:

Grant Permission to Submit

Important: DO NOT perform these steps if you are not ready to submit your proposal to the sponsor. Doing so indicates to the ORSP that the application is final and ready to be submitted.

1. Open the funding proposal.
2. From the funding proposal workspace, click **Permission to Submit**.
3. Select the check box to indicate the proposal is complete and can be submitted to the sponsor.
4. Click **OK**.

Respond to a Reviewer Request

If a reviewer requires you to change something in your proposal, you will receive an email indicating this. Review the request details and then respond to the request.

Department Review: Pending Changes by PI

PROPOSAL INFORMATION

CONTACT INFORMATION

1

Review Request

Review the email message and click the proposal ID link to open the proposal.

If you no longer have the email, you will find the proposal on your My Inbox tab.

1. If the reviewer logged reviewer notes, click the **Reviewer Notes** tab and go to [Respond to Reviewer Notes](#) below. If not, go to [Submit a Response](#).

Respond to Reviewer Notes

For each reviewer note:

2. If you need to edit the proposal in response to the reviewer note, click the **Jump To** link and make the change.
3. From either the proposal page or the Reviewer Notes tab, click the **Click here to respond** link.
4. Select a response and explain your response in the text box.
5. Click **OK**. If on a proposal page, exit the proposal when done.

Submit your response (steps below).

Submit a Response

6. On the proposal workspace, click **Submit Changes To Department Reviewer** or **Submit for Department Re-Review**.
7. In the Comments box, explain your response to the reviewer.
8. Click **OK**.

Reviewer Notes

Filter by Type Enter text to search for + Add Filter x Clear All

Type

Department Change Request
Jump To: 1.0 Proposal Description & Contacts 2

Change Post Award Department Administrator 1.0.5

Response Required! Click here to respond... 3

Change Complete 4

Comments go here

5 OK Cancel

Submit Changes To Department Reviewer

Submit Changes to Departmental Reviewers

Executing this activity indicates that you have made ALL of the changes as requested by the Department. If you have not made the requested changes, please describe the changes not made and provide an explanation below. Please note that the failure to make the changes requested by the department reviewers may prohibit or delay the submission of the proposal.

Please enter any comments to your departmental reviewers below.

Comments:

Comments go here 7

Attachments (optional)

name description

There are no items to display

6 8 OK Cancel