PACS Portal

Grants Module

Create a Funding Proposal
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What is the PACS Portal?
The SUNY Pre-Award and Compliance System (PACS) is a multi-year collaboration created to support investigators and students along with compliance and research administrative staff by giving them a new online administrative tool.

PACS will automate the submission, review, and approval processes while managing all major administrative aspects of the research and compliance lifecycle - from proposal development and submission through compliance checks, negotiations, award setup and award management, to eventual project closeout.

This system integrates the following aspects of grants management into a single system:

• IRB
• IACUC
• Grants Management
• Conflicts of Interest (COI)
• Research Agreements
• Safety

Under the stewardship of the University at Albany(UA), Office of the Vice President for Research, this platform will allow UA to achieve a new level of uniformity and efficiency, while also producing valuable data analytics that can guide future decisions.

UA is helping lead this system-wide effort and is one of the larger SUNY Campuses to utilize the system.

Getting a PACS Account
Accounts have been created for faculty and staff at the University at Albany in preparation for campus-wide implementation of the PACS Portal. Faculty and staff users will log into the system using their NetID and University Password.

If your login attempt is unsuccessful, or you are a student participating on a research team, please follow the instructions below to request an account:

Navigate to the PACS webpage page at https://www.albany.edu/opacs/
Locate the PACS Portal Login area at the right of the page and click on the registration link.
Complete the Request Account form, and then click the Register button. Be sure when completing the form to select the University at Albany as your Campus Affiliation.
You will receive an email notification when your account has been activated.

**Logging into the PACS Portal**

Navigate to the UA PACS webpage at [https://www.albany.edu/opacs/](https://www.albany.edu/opacs/). Locate the quick links to the right of the webpage. Click on the PACS Sign in link.

You will be prompted to enter your **NetID** and **Password**, followed by clicking the **Sign In** button.
Grants Tab

In order to create a new funding proposal from the login page of PACS, select the Grants Tab in the top navigation menu and then select Create Funding Submission.

Enter the required information into each SmartForm. Required fields are marked with a red asterisk (*). Select the Continue button at either the top-right or bottom-right of each form once completed. Data is auto saved via the Continue button.

Click the Help icon ( ) for more information about a question or field
Additional Tips

Click the Hide/Show Errors link in the navigation bar at the top or bottom of the SmartForm page to display any unanswered questions.

*Use the Jump To: link to navigate directly to SmartForm pages*

Workflow

The below workflow appears in the proposal workspace showing all stages of the funding proposal lifecycle. The highlighted blue bubble changes as each stage of the funding proposal is completed.
How to use these instructions
Each section below has a screenshot of the SmartForm. The screenshot highlights the required fields that need to be filled out in order to continue to the next page which is also indicated by a red asterisk (*). You may need to fill out more than the required information in order to submit your proposal.

SmartForms
Proposal Description & Contacts

1.0 (*) Short title of proposal
This is the full title of your proposal for non-NIH proposals. NIH proposals must be under 200 characters

2.0 (*) Program Director / Principal Investigator / Project Lead / Fellow:
This will auto populate to the person who created the proposal. To change, search by an individual’s name.
A COI Disclosure, Biosketch & Other Support for the Principal Investigator is not required at this time.
If proposal is a fellowship, list the fellow as the Principal Investigator and UA faculty member as the Mentor. The Mentor will be identified as UA’s internal PI

3.0 Research Coordinator
Do not list Pre-Award Services staff or CoPI’s here. You may add any UA personnel you want to have edit rights and notifications regarding the proposal (example: departmental staff)

Note: If this person needs only edit rights add them below on question
7.0 Select team members that have EDIT rights.
4.0 Administrative Contact

Do not list Pre-Award Services staff or CoPI’s here. You may add any UA personnel you want to have edit rights and notifications regarding the proposal (example: departmental staff)

*Note: If this person needs only edit rights add them below on question 7.0 Select team members that have EDIT rights.*

5.0 (*) Select Sponsor

Search the funding Sponsor by typing on the search bar or by clicking the ellipsis. If the Sponsor cannot be located in the search tool, you can use the Name TBD. Please enter the Sponsor Name in the field below. Only select a Prime Sponsor if this is a flow through submission.

*Note: Using the wildcard % before and/or after the sponsor name will broaden the search results*

6.0 (*) Are there other personnel associated with this funding proposal

This question drives the section Additional Personnel. If your proposal includes other internal investigators on the proposal credit distribution/budget Yes should be selected.

Proposal Access Rights Definition:

7.0 Select team members that have EDIT rights:

Select UA users that can edit the proposal, budget, and SF424. These users can be CoPI’s or other project personnel named in the proposal. They will not receive any email notifications from the Grants module. If notifications are required, please add the individual as an Administrative contact or Research Coordinator.

8.0 Select team members that have READ only rights:

Select UA users that have view only rights to the proposal, budget, and SF424. These users will not receive any email notifications from the Grants module. If notifications are required, please add the individual as an Administrative contact or Research Coordinator.
**Additional Personnel**

1.0 Select other Institutional investigators and key personnel that will be involved in this proposal:

When you click the Add button, a pop-up window will open. Include everyone who will be on the credit distribution/budget.

*Note: this is only for internal UA personnel*

**Add Institutional Proposal Staff**

1.0 (*) Staff Member

Search the individual’s name, if the name can not be located the individual will need to self-register for PACS.

2.0 (*) Project Role

If Other is selected type the role into the text box below

5.0 (*) This Individual is a:

The system updates question 6.0 depending on your answer. If you select, **Senior/Key Person on the proposal**, question 6.0 defaults to Yes and the person is added to the Credit Distribution page. If you select one of the other options, question 6.0 defaults to No.

6.0(*) Should this user be included on the Credit Distribution page?

This will default to Yes when selecting **Senior/Key Person** and will default to No when selecting **Other Significant Contributor on the proposal** or **Other Personnel**

If you respond Yes to this question the individual will show up on the Credit Distribution page where you will be able to add the credit accordingly.
7.0 (*) Should this individual be required to approve proposal?
If you responded Yes to this individual being a Senior/Key Person on the proposal this question with default to Yes. Individuals that are key contributors to a proposal are required to approve the proposal before routing to the department review.

Add non-Institutional Proposal Staff
2.0 Identify all non-institutional investigators and personnel that will be involved in this proposal:
Not required at this time, however you may enter information if desired.

General Proposal Information

1.0 Type of Application
This is defaulted to New. Please make a selection as appropriate. The options to select from are New, Renewal, Continuation, Revision & Resubmission

Type of Sponsor Selected
This is mapped from your earlier selection of sponsor.

2.0 If Resubmission or Renewal, please enter the Sponsor #
Example (for NIH): GM123456

3.0 (*) Indicate how the forms will be submitted to the Sponsor:
At this time select Other for ALL funding proposal submissions.

4.0 (*) Instrument Type
Select anticipated award mechanism.

5.0 (*) Describe the purpose of this project: See some of the more common project purpose definitions below.
- Research is activities or functions organized to produce knowledge and
achieve specific research goals. This activity includes externally funded research or research funded from unrestricted funds that is accounted for and budgeted separately. “Research” is defined as a systematic study directed toward fuller scientific knowledge or understanding of the subject studied. “Development” is the systematic use of knowledge and understanding gained from research directed toward the production of useful materials, devices, systems, or methods, including design and development of prototypes and processes.

- Training means activities that generally support graduate and undergraduate students working toward a degree.

- Public Service means activities providing non-instructional services beneficial to individuals and groups external to the institution. Included in this category are community service activities for conferences, institutes, general advisory services and reference bureaus, consultation, and testing services. Also include cooperative extension efforts between the institution and outside agencies.

6.0 (*) Is this a Clinical Trial?
Select as appropriate

7.0 (*) Is this a multi-PI Submission?
Select as appropriate

8.0 (*) Is this an on-campus submission, an off-campus submission, or both? Select as appropriate

Research Department Determination

1.0 (*) Select the Submitting Department:
Use the identification number 010 before the Organization entered in the search (e.g., 010 Biology, 010 Psychology, etc.). The % sign may be used as a wildcard to broaden search results.

2.0 Sponsored Research Location (Institution):
These fields default from the system. No changes can be made.
Compliance Review

For each of the required questions on this page, indicate their involvement in this project:

If you select Yes to the following: Human Subjects, Vertebrae Animals, Recombinant DNA and/or Hazardous Materials Usage an additional form(s) will be triggered to collect additional information regarding the submission. Otherwise, the next page that will display will be Export Control.

If you select Yes to Human Embryonic Stem Cell and this is a Federal submission the form Federal Grant Stem Cell Lines will display for completion in the Federal Grant Information section.
Export Control
If you have questions, contact compliance@albany.edu

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<td><strong>1.0 (*)</strong></td>
<td>Does the project involve export restricted science or engineering areas?</td>
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<td><strong>2.0 (*)</strong></td>
<td>Does this project involve the use of equipment, software, services or technical data (information) that is on the United States Munitions List (USML) under the International Traffic in Arms Regulations (ITAR)?</td>
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<td><strong>3.0 (*)</strong></td>
<td>Does the project provide any data or information about an ITAR defense article to a non-US person or are you providing any data or information to a foreign national or foreign entity for a military or defense application?</td>
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<td><strong>4.0 (*)</strong></td>
<td>Do you anticipate receiving any Proprietary Information...?</td>
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<tr>
<td><strong>5.0 (*)</strong></td>
<td>Do you or your study team, as part of this project, anticipate transferring or providing access abroad by any means, to any software, laboratory equipment, biologics, materials, or any other commodity such as laptop, cell phone, cameras, to any individual...?</td>
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<tr>
<td><strong>6.0 (*)</strong></td>
<td>Does this project provide data, services or conduct any transaction with or in an embargoed country as defined by the Office of Foreign Asset Controls such as North Korea, Iran, Cuba, Syria or Sudan?</td>
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<td><strong>7.0 (*)</strong></td>
<td>Results of Fundamental Research are not controlled because they are intended to be published and shared widely. Is there any reason that you do not intend to publish or share your results?</td>
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<td><strong>8.0 (*)</strong></td>
<td>Do you anticipate that this project will involve restrictions to the dissemination of results, involvement of foreign nationals or any other export controls related concerns?</td>
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<tr>
<td><strong>9.0 (*)</strong></td>
<td>Does this project involve any non-US persons or organizations, including students if known? Answering Yes to this question will trigger the appearance of a text box to provide clarification.</td>
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Campus Specific Documents (Campus Impact Statement)

1.0 Click the hyperlink, Campus Impact Statement.pdf to view/download the fillable PDF form. The PACS Funding Proposal Number requested at the top of the form is found on the top right corner of your proposal and your main proposal workspace.

Please complete all of the questions. Then click ADD and upload the completed Campus Impact Statement to the proposal. Reviewers/Approvers are being directed to this page to review items that may have a direct impact on departmental and/or university resources.

Program Classification

Program Classification
Select the two most relevant terms for each of the program classifications listed below:

1.0 Discipline / Field:
* Primary (NSF Discipline Code): BIOLOGICAL PSYCHOLOGY
* Secondary (CIP Code):

2.0 This proposal is related to:
* Cancer Research:  Yes  No  Clear
* HIV Research:  Yes  No  Clear
* Phase 3 Clinical Trial:  Yes  No  Clear
* Investigational Drug:  Yes  No  Clear

1.0 (*) Discipline / Field
Select the most relevant item from the list for the Primary classification. The additional Secondary (CIP Code) stands for Classification of Instructional Programs. It provides a taxonomic scheme that supports the accurate tracking and reporting of fields of study and program completions activity for the University. UA uses this data for reporting on all sponsored research categories (not only NSF proposals) utilizing the National Science Foundation and Classification of Instructional Programs (CIP) codes.

2.0 (*) This proposal is related to
Select as appropriate
1.0 Opportunity ID (PA or RFA Number):
If available enter the federal Opportunity ID

2.0 Opportunity Title
Enter as appropriate

3.0 Agency Name
Not required at this time

4.0 NIH Grant Type (if applicable):
Click ellipse and search for the Type from the list.
Contact you Research Administrator if the opportunity number is not present

Federal Grant Program Income

1.0 (*) Will there be program income?
Select as appropriate
Federal Grant Stem Cell Lines

Note: This form will only display if you selected Yes to Human Embryonic Stem Cell in the Compliance Review Form. Select response as applicable.

Submission Dates

1.0 (*) Application submission deadline:
   Please review the sponsors instructions to determine if there is a specific deadline date. If so, please enter it here.

2.0 SPO Submission Deadline
   This field will automatically populate

3.0 Date response expected from sponsor (estimated): Enter if known

4.0 (*) Expected Start Date:
   Determine an appropriate Start Date for your application. This will also be the start date for first budget period.
Budget Settings

Budget Periods

A budget table will be created using the Start Date entered on the Submission Dates Form and will default to five rows. If necessary, use the Add and/or Remove buttons within the chart to edit the number of Periods. This is how an end date for the project is created.

Target Direct $ and Target Indirect $ No entry is required at this time. All budget information will be filled out in the Budget Section. PI’s will need to coordinate with their Research Administrator or Department Administrator on the completion of this section.

Research Performance Sites

Note: This section is used only for mapping to the SF424

1.0 Sponsored Research Location (Institution):
   This will auto populate. No action is required.

2.0 If there are additional project/performance locations, select them below:
   Not required at this time.
Research Attachments

1.0 (*) Project Abstract
   Explain, in layman’s terms, what you will do for the proposed activity. The explanation should be two to three paragraphs in length.

2.0 Project Narrative
   Final or near final plan to carry out the activity you are proposing. (Sponsor’s refer to this differently e.g. Research Strategy, Project Strategy).

3.0 Proposal in Full
   Please skip: This will be uploaded in another location by your Research Administrator

4.0 Budget
   A detailed internal budget in Excel format is to be uploaded here. An initial draft budget can be sent as an attachment through the Email Specialist action in the Proposal Workspace.

5.0 Cost Share Budget
   Only required if the project will propose approved cost share. In included in the budget you must upload a SUNY Cost Share Approval below in section 7.0.

6.0 Budget Justification
   A detailed justification for all expenses which will be incurred over the life of the project. The justification should provide, in sufficient detail, for post-award review of expenses

7.0 Other (Waiver of F&A, guidelines, other as needed)
   Upload completed campus specific/project specific documents here. These may include, but are not limited to, approved F&A waivers, SUNY Cost Share Approval and any documents required to be submitted by the sponsor such as sub-recipient monitoring form(s).
Completion Instructions

At this point Funding Proposal Forms are now complete.

Next steps: Follow directions to complete the Credit Distribution

Credit Distribution
Navigating to Credit Page

Verify that:

- Proposal Credit (sum of all individual(s) Proposal Credit) must equal 100%
- Financial and Recognition (sum of each individual’s Department/Center/Institute Credit) must equal 100% per PI/CoPI/Senior Person/Key Person
- All departments have pre-approved the credit split prior to routing (specifically when including key personnel outside your college or department.)
Adding a Department/Center/Institute

1. Click the Add button

2. Type in the Department/Center/Institute into the box starting with “010” or click Select and select the Department/Center/Institute from the popup box, scroll down and select OK.
3. Select Apply or OK
   - By selecting Apply the page is saved
   - By selecting OK the page is saved and exited to the proposal workspace

Proposal Budget
(PI’s should coordinate with their Research Administrator and/or Department Administration on who is responsible for all budget information in PACS)
From the proposal workspace, click the **Budgets** tab and then the budget name to open the budget workspace.

**Note:** The system automatically created this budget and named it based on the sponsor selected in the proposal.

Click **Grid: Inflation and Indirect Rates** on the left of the workspace to review the inflation and indirect rates. To change indirect rates:

- The default cost base type is MTDC. To see the other cost base types available, click the down arrow.
- To change the indirect cost rates, click in the rate field and type a new value.
- To copy a rate to subsequent periods, click the blue arrow to the right of the value.

Click OK or Apply to save the changes and return to the budget workspace.

From the budget workspace, click the **Edit Budget** button.
General Budget Information

Most of the fields on this page are auto populated from the proposal. In general, the principal investigator, funding source, and project sponsor should not require updates here; change them in the funding proposal, if needed.

1.0 (*) Budget Title
2.0 (*) Principal Investigator for this Budget
3.0 (*) Budget Type
   Select Project. It is the only option available in the drop down
4.0 (*) Funding Source - Will Default
   Project Sponsor - Will Default
   Is Modular Budget? - Select as appropriate
5.0 (*) Sponsor Budget Detail Level
   Select Per Period, Budget Category Totals
   Full details will not be used at this time.

Budget Characteristics

1.0 (*) Will this budget pay for participant/trainee costs?
   Select as appropriate
2.0 (*) Will this budget Subaward/Subcontract research to another institution?
   Select as appropriate. If you select Yes, the system will add a page for you to enter the subaward/subcontract organizations. The system will also create a subaward/subcontract budget for each organization that you must complete.
3.0 (*) Will this budget have Cost Sharing?
   Select as appropriate. If you select Yes, the system will create a cost sharing budget for this proposal that you must complete.
## Budget Worksheet

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<td>Animal Purchase/Care Costs</td>
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<tr>
<td>Alterations and Renovations</td>
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<td>Audio/Computer Services</td>
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<td>Other</td>
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<td>Excess</td>
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</table>

Enter Total Direct Cost on the Other Line per period. Enter Total Indirect Cost on Indirect Line per period. To copy a number to subsequent periods, click the blue arrow to the right of the value.

### Attachments for Internal Purposes

**Not needed at this time.** Click **Finish** and you will be brought back to the budget workspace.

Your next step is to complete any other budgets (other subaward/subcontract budgets or cost sharing budgets) for the proposal. If all budgets, along with the funding proposal, are complete, then your next step is to submit the funding proposal for department review.

### Complete a Subaward/Subcontract Budget -If Applicable

(PI’s should coordinate with their Research Administrator and/or Department Administration on who is responsible for all budget information in PACS)

From the proposal workspace, click the **Budgets** tab and then the name of the sponsor budget that has a subaward/subcontract.
From the sponsor budget’s workspace, click the Subaward/Subcontract tab. Click the name of the subaward/subcontract budget to open it.

From the subaward/subcontract budget workspace, click the Edit Budget button and complete the budget SmartForm pages. Pay attention to the fields listed below. Click Continue in the Navigation Bar to move through the pages. Required fields are marked with red asterisk (*).

**Subaward/Subcontract Budget Information**

1.0 (*) Title
2.0 Organization
3.0 (*) Budget Type
4.0 (*) Principal Investigator
5.0 (*) Dollar Target Limit
6.0(*) Subaward/Subcontract Budget Detail Level
   - If you select **Per Period, Budget Category Totals** you will need to complete the Budget Worksheet. Please refer back to the proposal budget section for guidance.
   - If you select **PDF Import** you need to have a completed R&R Subaward Budget Template form for upload on the next screen.
     - Do not select **Full Details** at this time.

**All Listed Personnel**

1.0 Subcontract/Subaward Key Personnel, Graduate Students, Post Grads, etc.
   - Enter information as needed

**Subaward/Subcontract PDF Upload or Worksheet Entry**

Depending on how you answered number 6.0 within the Smartform Subaward/Subcontract Budget Information you will see an area to upload the PDF R&R or enter Direct/Indirect information. If you will be using **Per Period, Budget Categories Totals** refer back to the proposal budget section for guidance.

**Complete a Cost Sharing Budget -If Applicable**

*(PI’s should coordinate with their Research Administrator and/or Department Administration on who is responsible for all budget information in PACS)*

From the proposal workspace, click the Budgets tab. If Cost Share was selected as **Yes** during the setup of the proposal budget a hyperlink to access the Cost Share budget workspace will appear here along with the proposal budget hyperlink. Click the name of the Cost Share budget to open it, the name will appear as Cost
Sharing for (Sponsor Name). From the workspace, click the Edit Budget button and complete the budget SmartForm pages. Pay attention to the fields listed below. Click Continue in the Navigation Bar to move through the pages. Required fields are marked with red asterisk (*).

**General Budget Information**

1.0 (*) Budget Title
2.0 (*) Principal Investigator for this Budget
3.0 (*) Budget Type
   
   Be sure that Cost Sharing is selected
4.0 (*) Funding Source
   
   Select as appropriate
   
   (*) Project Sponsor
   Will be 010 University at Albany
   (*) Is Modular Budget
   Select as appropriate

5.0 (*) Subaward/Subcontract Budget Detail Level
   
   Select Per Period, Budget Category Totals. You will need to complete the Budget Worksheet. Please refer back to the proposal budget section for guidance.
   
   Do not select Full Details at this time.

**Budget Characteristics**

1.0 Will this budget pay for participant/trainee costs?

   Select as appropriate

**Cost Share Budget Worksheet Entry**

Per Period, Budget Categories Totals refer back to the proposal budget section for guidance. All Direct Cost per period should go on the Other Line and Indirect Cost on the Indirect Line

**Attachments for Internal Purposes**

No attachments should be placed here. All attachments should be placed in the SmartForm page Project Attachments of the proposal.

You have reached the end of Creating a Proposal please refer to instructions on routing the proposal for Individual/Department Review.