

# HELPFUL HINTS FOR PROPOSAL DEVELOPMENT

## PRINCIPAL INVESTIGATORS & DEPARTMENTAL ADMINISTRATORS

As a reminder, complete proposals are due to our office **5 BUSINESS DAYS** before the sponsor's deadline (as defined in the opportunity announcement). Submission and acceptance are not guaranteed for proposals received less than 5 business days before the Sponsor's deadline.

Start your proposal **EARLY** to ensure sponsor and proposed subaward organizations are in PACS. **Adding new sponsors and subaward organizations will take at least a week.** If your sponsor or subaward organization is not in PACS, select **TBD** as the sponsor and enter the entities name below to continue working on your proposal. **NOTIFY YOUR RESEARCH ADMINISTRATOR (RA) IMMEDIATELY TO BEGIN THE PROCESS OF ADDING ORGANIZATIONS.**

The **minimum information** required to start your proposal are the questions with an asterisk on the first page titled **Proposal Description & Contacts**. Hit **save & exit** to return to the proposal later or **continue** to move forward with the proposal preparation. The proposal will then show on your grants page, and the grants page the RA's view.

**The Research Administrator (RA) does NOT need edit rights** as you did in COEUS. The RA will automatically have access to view and edit the proposal.

The **RA** working on the proposal will be noted within the proposal workspace. In cases of vacations or other time an RA may be unavailable, the RA assigned to assist you during this time will be changed and will show in the main proposal workspace.

Include **departmental pre-award staff** on the first page under Administrator or Research Coordinators. This will allow them to receive notifications sent to the proposal team and access/edit the proposal.

Be sure to include **post-award departmental administrators** with view rights to proposals so they will be able to view all documents at the time of award.

Once the first page is completed, you do not have to complete the proposal in order. You can use the "**JUMP TO**" drop-down at the top of the page to move to other pages of the proposal.

Additional **NAVIGATIONAL TOOLS** – **EXIT** will bring you back to the main proposal workspace. **OK** will save and bring you back to the workspace from the **CREDIT DISTRIBUTION** page. The **BREADCRUMBS** at the top of the page will bring you back to the funding proposal from the budget pages and also navigate back to the **GRANTS** page displaying your inbox.

**SEARCH OPTIONS** – for most searchable fields, you can begin typing the name of the individual or entity and matching names will appear for you to select. The other option is to click "select" and enter all, or part of the name in the search box. **The wildcard for PACS is the % symbol.** When searching for **departments**, you must enter **010** and a space before the name which designates the UAlbany campus.

**ALL PI's and CO-I's INCLUDED IN THE CREDIT DISTRIBUTION** must be included on the **ADDITIONAL PERSONNEL** page. You must select **YES** to question 6 on the **PROPOSAL DESCRIPTION AND CONTACT PAGE** for the **ADDITIONAL PERSONNEL** page to appear.

The **start date** is entered on the **SUBMISSION DATES** page, and the **end date** is determined by the number of budget periods selected on the following **BUDGET PERIODS** page. Add or delete periods as needed.

**NEW** to the proposal development is uploading a completed **CAMPUS IMPACT STATEMENT** on the Campus Specific Documents page. The campus impact statement includes questions that may require additional departmental or university resources and will be a document reviewed during the internal routing for institutional approvals. The campus impact statement asks for your **Funding Proposal Number or FP number**. This number is found at the top right of the main proposal workspace and also to the left of your inbox.

The **MINIMUM ATTACHMENTS** to upload on the **PROJECT PLAN ATTACHMENTS** page are the **NARRATIVE** (may be referred to as Scope of Work, Research Strategy/Plan or Project Description) in final or close to final version; an **INTERNAL DETAILED BUDGET IN EXCEL**; a **BUDGET JUSTIFICATION** and Cost Share documents if applicable.

**Credit Split** is entered after you start the proposal and can be accessed from the main proposal workspace, left side, mid-page, blue link.

**PACS does not have the "Certify" option** that PI's answered in COEUS. When the proposal begins routing, it will first route to all Co-PI's and Co-Investigators included in the routing to approve and then to the departments, etc. The proposal will NOT route to the PI. PACS assumes the PI developed and approved the proposal before routing.

**PLEASE REVIEW ALL PROPOSALS CAREFULLY FOR ACCURACY.** Information cannot be changed/edited after a proposal is routed and approved by the RA.

**BUDGET INFORMATION** – PI's should confirm with their Departmental or Research Administrator to confirm who will be entering the budget information in the budget tab.

Remember to update the IDC rate on the **GRID: INFLATION AND INDIRECT RATES** in the Budget section if it is not the full rate. This information will be downloaded to the Report Center and included in campus reports. It is found in a link to the left of the budget workspace.

To access the budget, click the **BUDGETS TAB** and then the link named after the sponsor of the proposal.

Until we begin submitting system-to-system, always select **PER PERIOD, BUDGET CATEGORY TOTALS** for the Sponsor Budget Detail Level. You may enter the budget by category for each period, or enter the total direct costs on the **OTHER** line and the total indirect costs. The system will not auto-calculate the budget unless you are entering a system-to-system detailed budget.

It is recommended requesting that subs submit their budgets on the NIH **R&R budget template** for ease in entering the subaward budget. The subaward budget is entered under a separate tab.