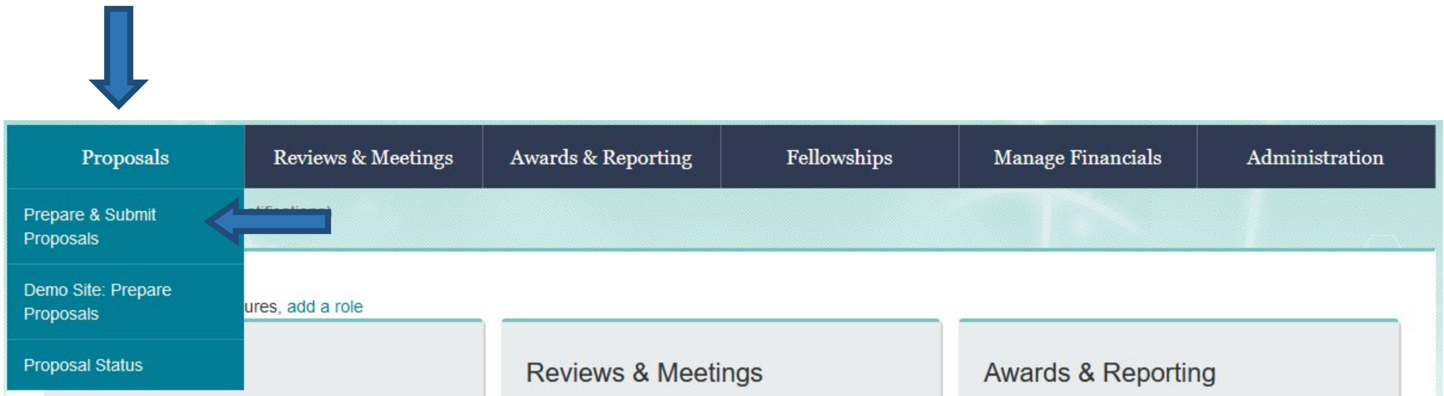
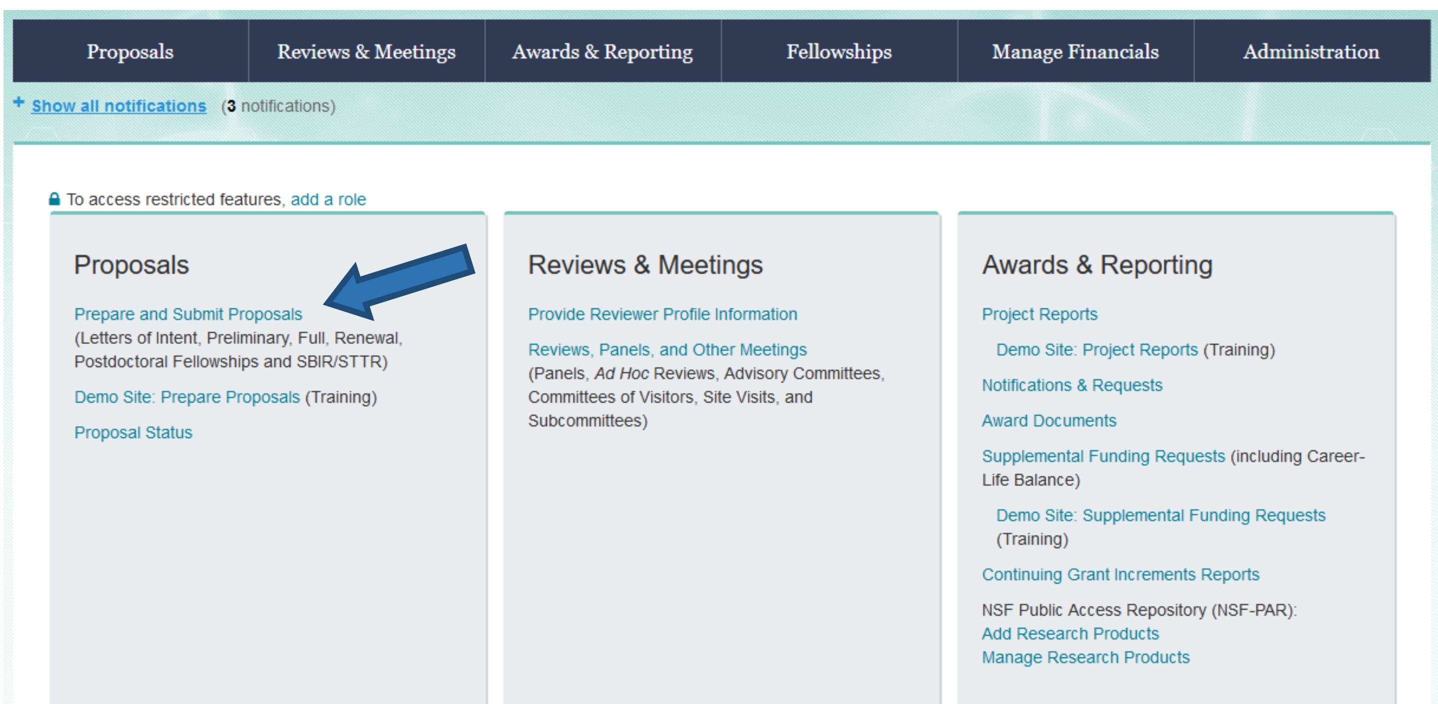
How to Prepare and Edit Proposals in Research.gov

1. Log on to Research.gov
2. Select Prepare & Submit Proposals



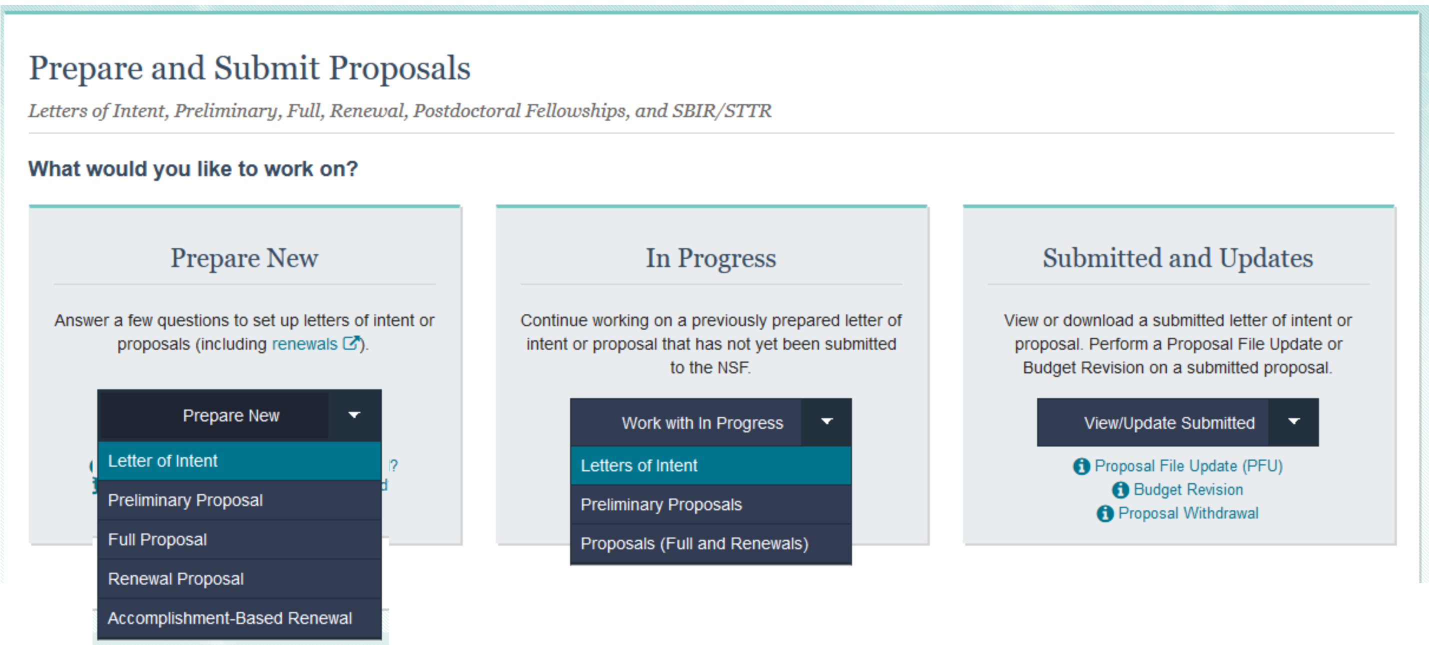
OR



Part 1, Proposal Setup

See Part 2 for Granting Access to your Proposal Analyst
See Part 3 for Setting up Personnel and Subaward Organizations
See Part 4 for Setting up Collaborative Proposals
See Part 5 for Document Upload Information
See Part 6 for Budget Forms Information

1. **Select** either **Prepare Proposal** or **Work on an In Progress Proposal**.



2. For an **In Progress (LOI, Preliminary, Proposal),** select the type of existing submission you want to work on, and **proceed to Parts 2-6**.

3. For **Prepare New (LoI, Preliminary, Full, Renewals), select** the type of submission you plan.

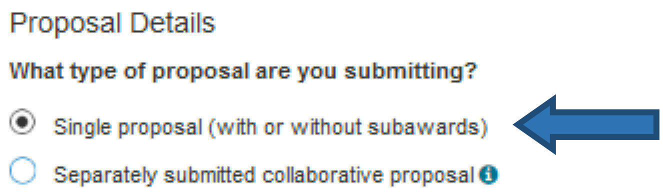
Select	Funding Opportunity Number	Funding Opportunity Title
○	NSF 24-1	Proposal & Award Policies & Procedures Guide - PAPPG
○	NSF 24-592	Ecology and Evolution of Infectious Diseases
○	NSF 24-590	Engineering Research Initiation
○	NSF 24-589	Computer and Information Science and Engineering (CISE): Core Programs

4. **Select** Opportunity Number, then **Next**.

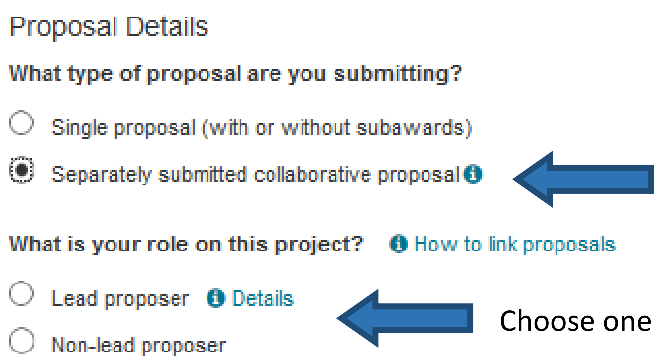
5. **Select** the Directorate, Division and Program as appropriate, Save, then **Next**.

6. **Select** the Proposal Type. Select **Next**.

7. **Select** the proposal details:
   a. **Single proposal** for a submission from only our institution (this can include subawardees – **see Part 3** for how to add subawardees); or



b. **Separately submitted collaborative proposal** for projects where multiple institutions are submitting their own pieces – **see Part 4** for how to add collaborative proposals
   i. Select whether our institution is the lead or non-lead. Leads will be responsible for uploading the proposal documents.



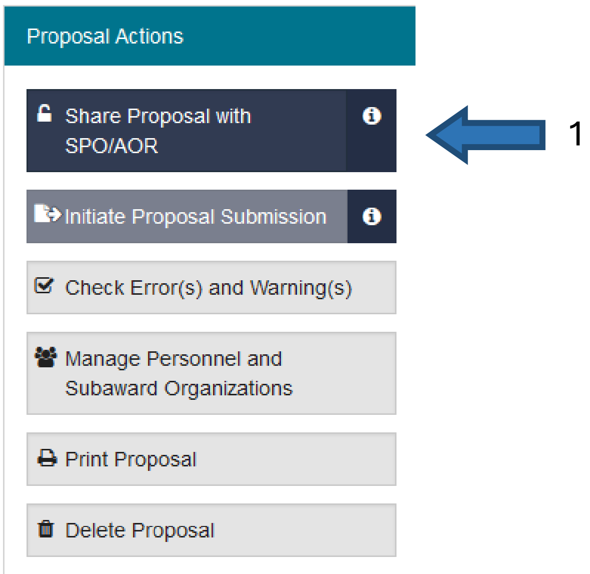
8. **Enter the Title** of the Project and select Prepare Proposal.

ONCE YOU'VE SELECTED THE PREPARE PROPOSAL BUTTON, THE ONLY OF THE ABOVE THAT OPTIONS CAN BE CHANGED ARE THE TITLE AND THE DIRECTORATE/DIVISION/PROGRAM.

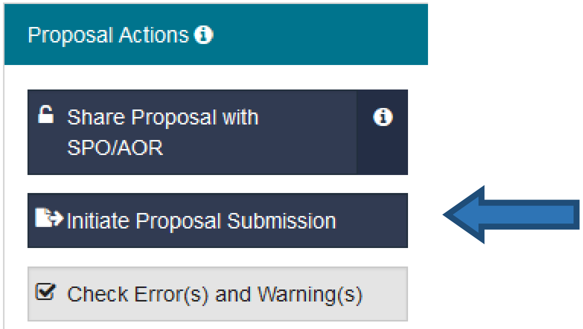
Part 2, Granting Access to your Proposal Analyst

See Part 3 for Setting up Personnel and Subaward Organizations
See Part 4 for Setting up Collaborative Proposals
See Part 5 for Document Upload Information
See Part 6 for Budget Forms Information

1. **Grant Access** to OCG so that your Proposal Analyst can work on the project with you; **notify** your Proposal Analyst that you have done so.



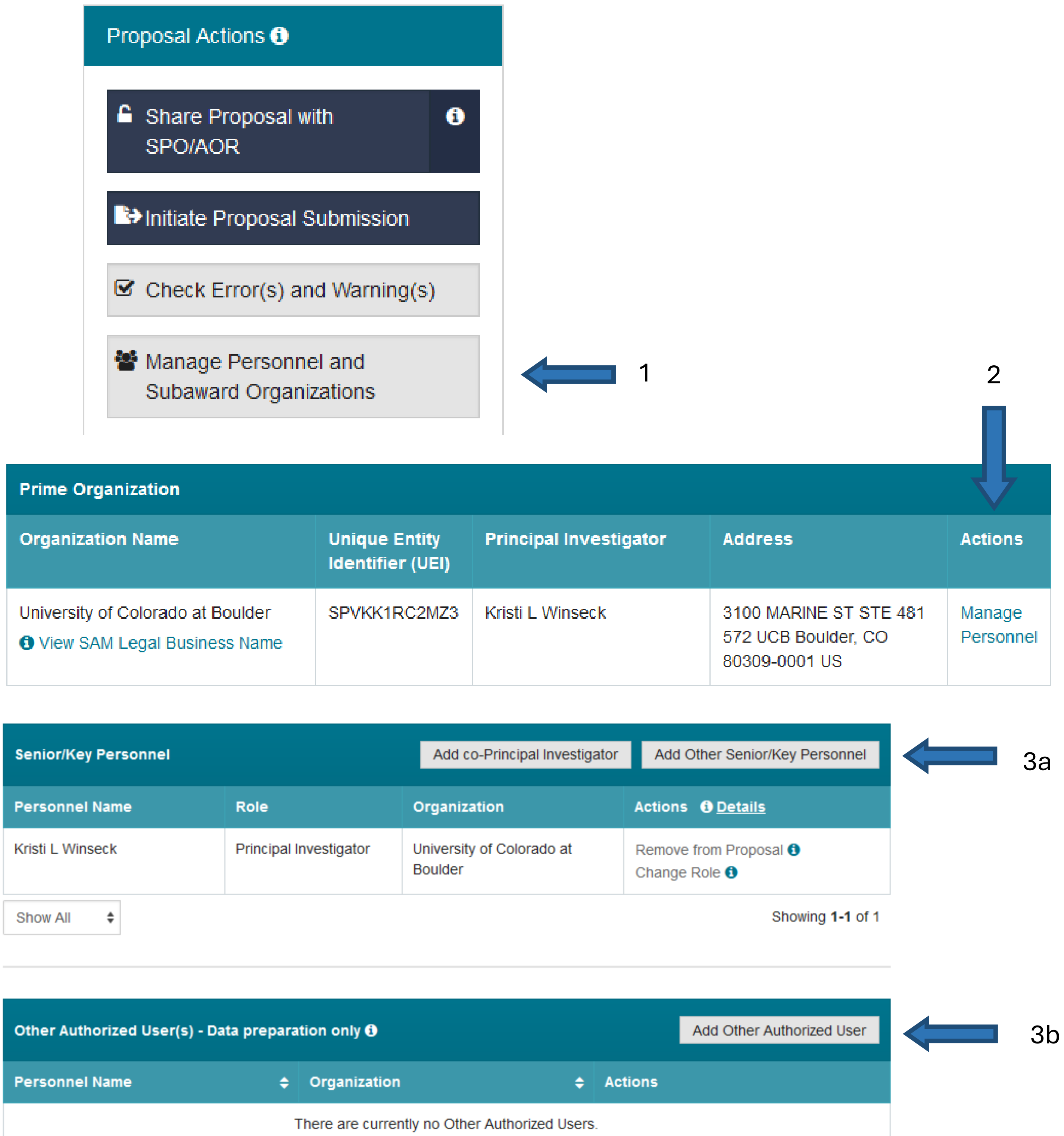
2. **For AORs only** – once the PI has granted submission access, this **Initiate Proposal Submission** button will appear.



Part 3, Setting Up Personnel and Subaward Organizations

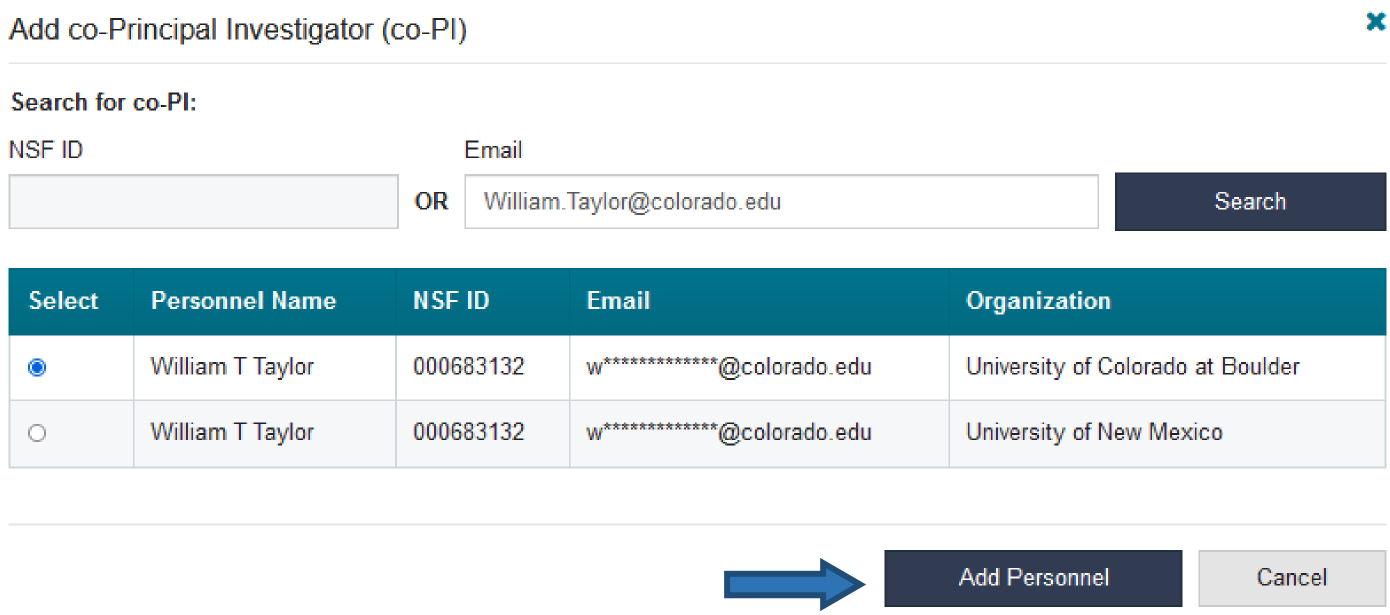
See Part 2 for Granting Access to your Proposal Analyst
See Part 4 for Setting up Collaborative Proposals
See Part 5 for Document Upload Information
See Part 6 for Budget Forms Information

1. **Add** CoPIs and Other Senior/Key Personnel (**3a**) or other user access (**3b**).



Make sure you select the correct organization. The PI <u>must</u> be at CU Boulder, coPIs and Other Key Personnel can be from another organization.

Note that the screenshot below is from setup, where the Proposal Analyst has started the project under their name and is adding the PI as coPI before removing the Proposal Analyst from the project – this is why it says “Add co-Principal Investigator”.


Add co-Principal Investigator (co-PI)

Search for co-PI:

NSF ID OR Email: William.Taylor@colorado.edu [Search]

Select	Personnel Name	NSF ID	Email	Organization
◉	William T Taylor	000683132	w*************@colorado.edu	University of Colorado at Boulder
○	William T Taylor	000683132	w*************@colorado.edu	University of New Mexico

Add Personnel | Cancel

2. **Add** Subaward Organizations and their Personnel.


Manage Personnel and Subaward Organizations

Prime Organization

Organization Name	Unique Entity Identifier (UEI)	Principal Investigator	Address	Actions
University of Colorado at Boulder View SAM Legal Business Name	SPVKK1RC2MZ3	Kristi L Winseck	3100 MARINE ST STE 481 572 UCB Boulder, CO 80309-0001 US	Manage Personnel

Subaward Organization(s) — Add Subaward Organization — 1

Organization Name	Unique Entity Identifier (UEI)	Address	Actions
No Subaward Organizations have been added. Once an organization is added, the personnel for this organization can be specified.			

Add Subaward Organization

Search for and add a subaward organization registered with NSF. If the subaward organization has not yet registered, please refer to the registration instructions.

2 **Organization Name** horse OR **Unique Entity Identifier (UEI)** What is a UEI? Search 3

Show All — Showing **1-3** of 3

Select	Organization Name	Unique Entity Identifier (UEI)	Address
○	BLACKHORSE SOLUTIONS, INC. View SAM Legal Business Name	CFKVXZJ329K7	13461 SUNRISE VALLEY DR BLDG 8 HERNDON, VA 20171-3283 US
4 ◉	SAWHORSE REVOLUTION View SAM Legal Business Name	G811TFYAU219	801 2ND AVE STE 501 SEATTLE, WA 98104-1509 US
○	Seahorse Coastal Consulting, LLC View SAM Legal Business Name	RNFAFV2N9M51	3103 MANDY LN MOREHEAD CITY, NC 28557-3155 US

Show All — Showing **1-3** of 3

5 Add Subaward Organization

Subaward Organization(s) — Add Subaward Organization

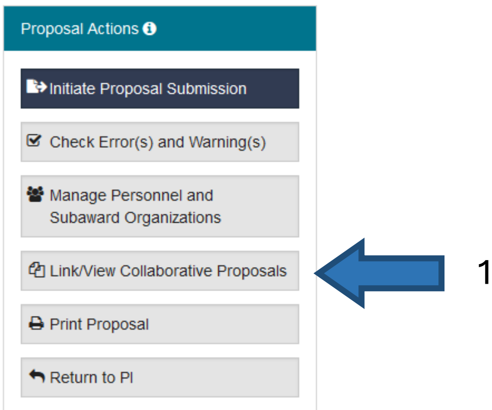
6
See Section 1 above for **adding**

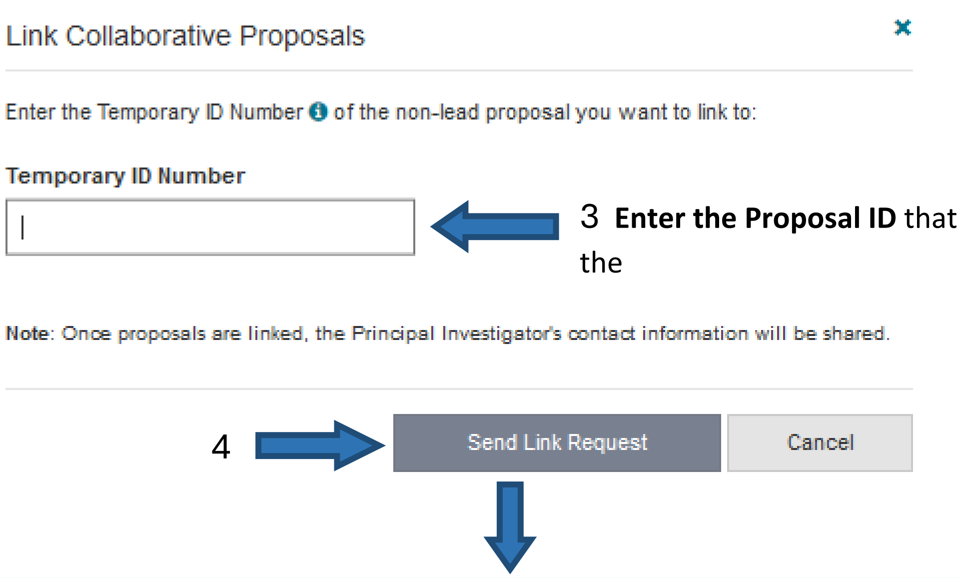
Organization Name	Unique Entity Identifier (UEI)	Address	Actions
SAWHORSE REVOLUTION View SAM Legal Business Name	G811TFYAU219	801 2ND AVE STE 501 SEATTLE, WA 98104-1509 US	Manage Subaward Personnel Delete Subaward Organization

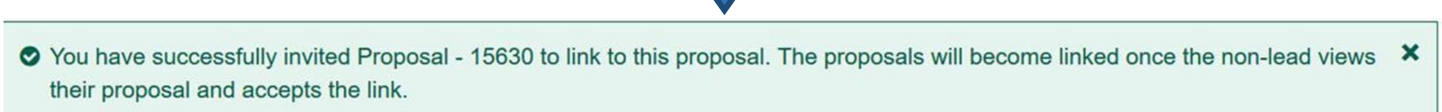
Part 4, Linking Collaborative Organizations

See Part 2 for Granting Access to your Proposal Analyst
See Part 3 for Setting up Personnel and Subaward Organizations
See Part 5 for Document Upload Information
See Part 6 for Budget Forms Information

1. **Link Collaborative Proposals** when CU is the lead.







A **successfully linked** proposal will look like this (proposal 15630 is the non-lead proposal that has been linked to our lead proposal).

Link/View Collaborative Proposals

Collaborative Proposals | Link Collaborative Proposals

Temporary ID Number	Principal Investigator	Organization	Proposal Status	Actions
Linked Proposal: 15630	[redacted]	University of Colorado at Denver	Not Shared with SPO/AOR	Unlink Proposal

2. To **unlink** after the invitation has been accepted.

Collaborative Proposals | Link Collaborative Proposals

Temporary ID Number	Principal Investigator	Organization	Proposal Status	Actions
Link request pending: 15630	[redacted]	University of Colorado at Denver		Cancel Link Request

3. To **cancel** before the inviatation has been accepted.

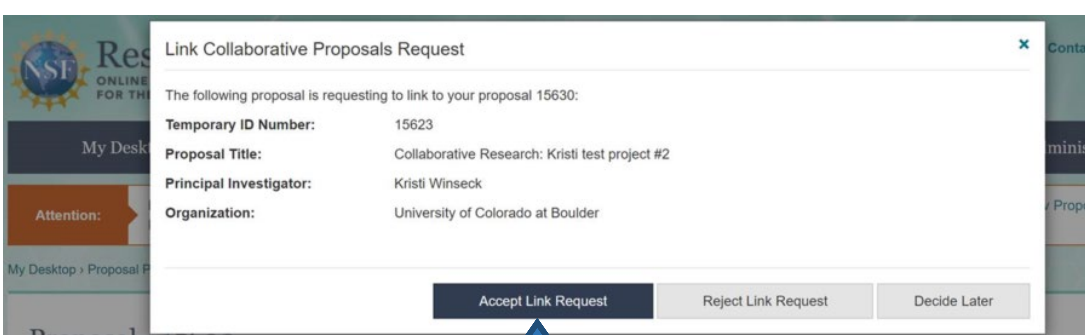
4. To have your proposal linked when another orgainziation is the lead, the lead will **send you an invitation** to link.

In Progress Proposals

One or more requests to collaborate need attention. Please view the proposal(s) to accept or reject the link request(s).

Temporary ID Number	Proposal Title	PI Name	Due Date
Link request pending: 15630	Collaborative Research: Kristi test project #2	P[redacted]ei	Date inherited from the Lead Proposal

1 **Click** on the blue Temporary ID number



2

A **successfully linked** proposal will look like this (proposal 15623 is the lead proposal that has been linked to our non-lead project).

Link/View Collaborative Proposals

You have successfully linked to Proposal - 15623.

Collaborative Proposals

Temporary ID Number	Principal Investigator	Organization	Proposal Status	Actions
Linked Proposal (Lead): 15623	Kristi Winseck (303) 735-7821 kristi.winseck@colorado.edu	University of Colorado at Boulder	Submit Access for AOR	

NOTES:

- A Research.gov "Submission Pending" status informs the organization that their proposal submission is pending in queue until all linked lead and non-lead proposals in the collaboration attain "Submitted" status and can be submitted to NSF as a set.
- Separately submitted collaborative proposals with a "Submission Pending" status can be edited, but the Authorized Organizational Representative (AOR) must resubmit the edited proposal to return it to a "Submission Pending" status.

PART 5, UPLOADING DOCUMENTS

See Part 2 for Granting Access to your Proposal Analyst
See Part 3 for Setting up Personnel and Subaward Organizations
See Part 4 for Setting up Collaborative Proposals
See Part 6 for Budget Forms Information

1. **Select** which document you want to upload, or in the case of the Cover Sheet, fill out. As you upload documents they will be checked for compliance. Specific instructions for each document are included on the upload pages.

Proposal Sections	Last Updated	Compliance Status [Key]
Required		
Cover Sheet		Form not checked
Project Summary		Document unavailable for check
Project Description		Document unavailable for check
References Cited		Document unavailable for check
Budget(s)		Form not checked
Budget Justification(s)		Document unavailable for check
Facilities, Equipment and Other Resources		Document unavailable for check
Senior/Key Personnel Documents		Document unavailable for check
Data Management and Sharing Plan		Document unavailable for check
Mentoring Plan *Conditionally required*		Document unavailable for check
Optional		
Other Personnel Biographical Information		Document unavailable for check
Other Supplementary Documents		Document unavailable for check
List of Suggested Reviewers (Single Copy Document)		Document unavailable for check
List of Reviewers Not to Include (Single Copy Document)		Document unavailable for check
Deviation Authorization		Form not checked
Additional Single Copy Documents		Document unavailable for check

See 1a below

1a. Senior/Key Personnel Documents (Biosketch, Current and Pending Support, Collaborators and Other Affiliations, Synergistic Activities)

Senior Personnel Documents

Video: How to Manage Senior Personnel Documents

Show: All Organizations

Manage Personnel and Subaward Organizations

Expand all | Collapse all

Personnel Name	Role	Organization (Prime/Subaward)
Kristi L Winseck	Principal Investigator	University of Colorado at Boulder *(Prime)*
Travis Klempan	co-Principal Investigator	University of Colorado at Boulder *(Prime)*
Meredith Swanson	Other Senior Personnel	SMALL DOG ELECTRONICS, INC. *(Subaward)*

Senior/Key Personnel Documents

Video: How to Manage Senior/Key Personnel Documents

Manage Personnel and Subaward Organizations

Expand all | Collapse all

Personnel Name	Role	Organization
Kristi L Winseck	**Principal Investigator**	**University of Colorado at Boulder**

Documents	Last Updated	Compliance Status [Key]
Biographical Sketch		Document unavailable for check
Current and Pending (Other) Support		Document unavailable for check
Collaborators and Other Affiliations (Single Copy Document)		Document unavailable for check
Synergistic Activities		Document unavailable for check

PART 6, BUDGET FORMS

See Part 2 for Granting Access to your Proposal Analyst
See Part 3 for Setting up Personnel and Subaward Organizations
See Part 4 for Setting up Collaborative Proposals
See Part 5 for Document Upload Information

Proposal Sections	Last Updated	Compliance Status [Key]
Required		
Cover Sheet		Form not checked
Project Summary		Document unavailable for check
Project Description		Document unavailable for check
References Cited		Document unavailable for check
Budget(s) ⟵ **See below**		Form not checked
Budget Justification(s)		Document unavailable for check
Facilities, Equipment and Other Resources		Document unavailable for check
Senior/Key Personnel Documents		Document unavailable for check
Data Management and Sharing Plan		Document unavailable for check
Mentoring Plan *Conditionally required*		Document unavailable for check
Optional		

Budget(s)

See # 1 below → Manage Personnel and Subaward Organizations

Prime Organization			
Budget for:	**Principal Investigator**	**Total Requested Amount**	**Compliance Status [Key]**
University of Colorado at Boulder	Kristi Winseck	$193,240	No issue(s) found

Expand all rows | Collapse all rows

Years in budget: 1

Add Year | Delete Year

Personnel Direct Costs

Section	Year 1 # Personnel	Year 1 Months	Year 1 Funds	Total Funds Requested
A. Senior Personnel [Manage]	2	0.00	$0	$0
B. Other Personnel	0		$0	$0
C. Fringe Benefits			$0	$0
Total Salaries, Wages & Fringe Benefits (A-C)			$0	$0

Additional Direct Costs

Section	Year 1 # Participants	Year 1 Funds	Total Funds Requested
D. Equipment		$0	$0
E. Travel		$0	$0
F. Participant Support Costs		$0	$0
G. Other Direct Costs		$0	$0
H. Total Direct Costs (A-G)		$0	$0

Indirect Costs

Section	Year 1 Rate x Base	Total Funds Requested
I. Indirect Costs	$0	$0
J. Total Amount Requested (H + I)	$0	$0

1. **Set up Salaries** first. Transfer information from the Budget Estimimation that your Proposal Analyst has prepared. If you discover you've ommitted any Senior Personnel, you can return to the Manage Personnel page, either by clicking on the gray box at the top of the Budgets page, or the Manage Personnel section from the blue Menu box on the left.
2. If any of your Senior/Key personnel are unpaid for the entire project they'll need to be **removed from the budget** via the [Manage] option next to the Senior/Key Personnel header.
3. Once Salaries are set up, you can scroll down to fill in the rest of the form for Year 1, or you can set up the remaining years by **clicking the Add Year** button directly above the budget. If you choose to set up the remaining years at this point it will allow you to tab across the budget to fill in, rather than down. This follows our Budget Estimation tool and will allow you to fill in each section (salaries, fringe, travel, etc.) completely before starting the next section.

Personnel Direct Costs

Section	Year 1 # Personnel	Year 1 Months	Year 1 Funds	Year 2 # Personnel	Year 2 Months	Year 2 Funds	Total Funds Requested
A. Senior/Key Personnel [Manage]	1	1.00	$2,000	1	1.00	$2,000	$4,000
Kristi L Winseck (PI)		1	$ 2,000		1	$ 2,000	$4,000
B. Other Personnel	0		$0	0		$0	$0
Postdoctoral Scholars	0	0.00	$ 0	0	0.00	$ 0	$0
Other Professionals	0	0.00	$ 0	0	0.00	$ 0	$0
Graduate Students	0		$ 0	0		$ 0	$0
Undergraduate Students	0		$ 0	0		$ 0	$0
Administrative/Clerical	0		$ 0	0		$ 0	$0
Other	0		$ 0	0		$ 0	$0
Total Salaries and Wages for Senior/Key and Other Personnel (A-B)	Year 1 (A-B)		$2,000	Year 2 (A-B)		$2,000	$4,000

4. You will not add funds for any subawards to the CU budget form; **these numbers will feed into our budget** once you enter the subawardees' budgets.

G. Other Direct Costs	$0	$0	$0
Materials and Supplies	$ 0	$ 0	$0
Publication Costs/Documentation /Distrib	$ 0	$ 0	$0
Consultant Services	$ 0	$ 0	$0
Computer Services	$ 0	$ 0	$0
Other	$ 0	$ 0	$0

5. Press Save before exiting the form.

J. Total Amount Requested (H + I)	$81,620	$81,620	$163,240

Save | Preview/Print | Cancel

6. If you have a subaward, you'll need to **repeat steps 1-5** above using the budget form for each Subaward Organization.

Prime Organization			
Budget for:	**Principal Investigator**	**Total Requested Amount**	**Compliance Status** [Key]
University of Colorado at Boulder	Kristi Winseck	$0	Form not checked

Subaward Organization(s)		
Budget for:	**Subaward Requested Amount**	**Compliance Status** [Key]
SMALL DOG ELECTRONICS, INC.	$0	No issue(s) found