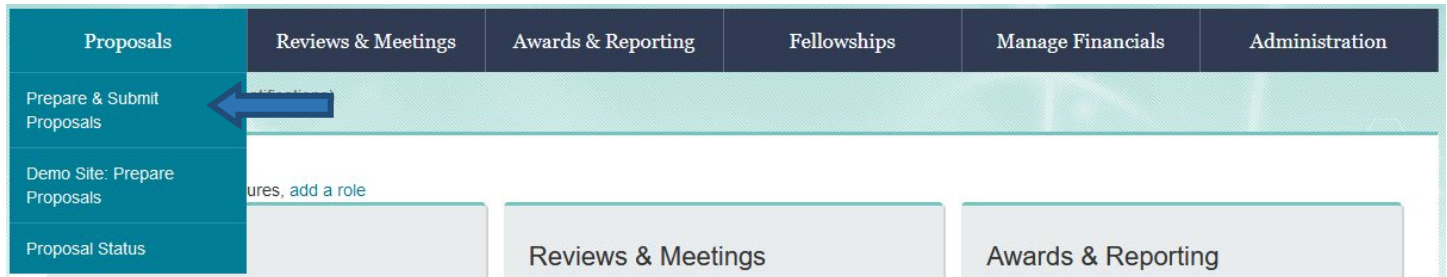
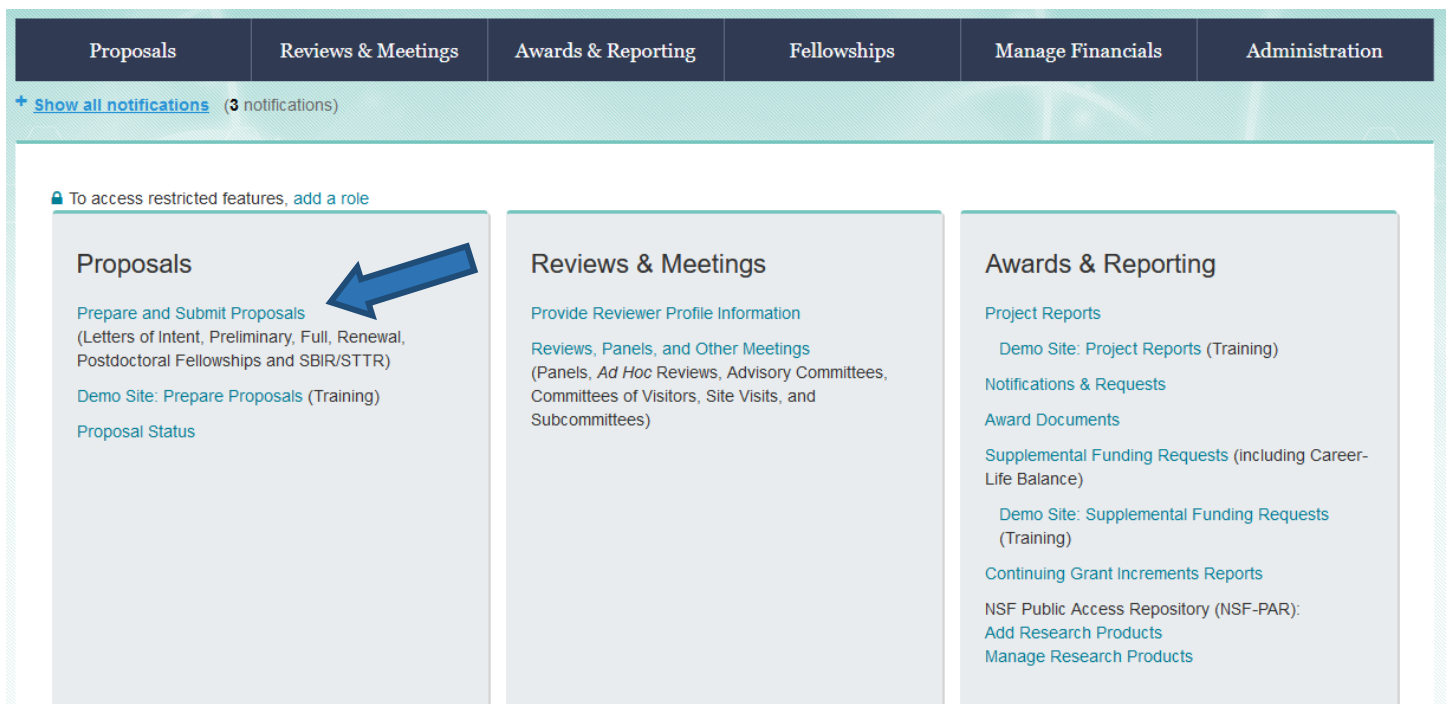


How to Prepare and Edit Proposals in Research.gov

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**.

Prepare and Submit Proposals
Letters of Intent, Preliminary, Full, Renewal, Postdoctoral Fellowships, and SBIR/STTR

What would you like to work on?

Prepare New

Answer a few questions to set up letters of intent or proposals (including [renewals](#)).

- Prepare New
- Letter of Intent
- Preliminary Proposal
- Full Proposal
- Renewal Proposal
- Accomplishment-Based Renewal

In Progress

Continue working on a previously prepared letter of intent or proposal that has not yet been submitted to the NSF.

- Work with In Progress
- Letters of Intent
- Preliminary Proposals
- Proposals (Full and Renewals)

Submitted and Updates

View or download a submitted letter of intent or proposal. Perform a Proposal File Update or Budget Revision on a submitted proposal.

View/Update Submitted

- Proposal File Update (PFU)
- Budget Revision
- Proposal Withdrawal



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
<input type="radio"/>	NSF 24-1	Proposal & Award Policies & Procedures Guide - PAPPG
<input type="radio"/>	NSF 24-592	Ecology and Evolution of Infectious Diseases
<input type="radio"/>	NSF 24-590	Engineering Research Initiation
<input type="radio"/>	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

Proposal Details



What type of proposal are you submitting?

- ☒ Single proposal (with or without subawards) 
- ☐ Separately submitted collaborative proposal 


- 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.

Proposal Details

What type of proposal are you submitting?

- ☐ Single proposal (with or without subawards)
- ☒ Separately submitted collaborative proposal  

What is your role on this project?  [How to link proposals](#)

- ☐ Lead proposer  [Details](#)
- ☐ Non-lead proposer

 Choose one

- 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.

Proposal Actions

Share Proposal with SPO/AOR

Initiate Proposal Submission

Check Error(s) and Warning(s)

Manage Personnel and Subaward Organizations

Print Proposal

Delete Proposal

1

Share Proposal Access with SPO/AOR

Attention: Visit the [Check Error\(s\) and Warning\(s\)](#) page for important details about potential and/or outstanding proposal error(s) and warning(s).

Select the level of proposal access you would like to give to the [Sponsored Projects Office \(SPO\)](#) and [Authorized Organizational Representative \(AOR\)](#). Other personnel's access to the proposal can be updated from [Manage Personnel](#).

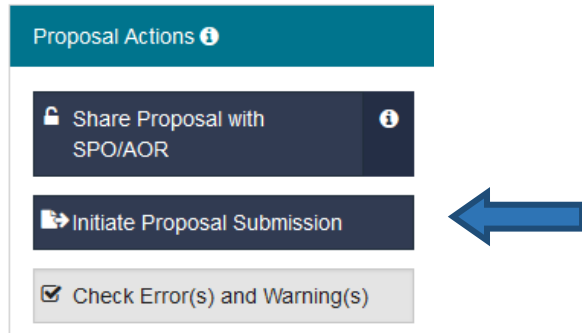
SPO/AOR Proposal Access		
Personnel Type	Proposal Access	Actions
Sponsored Projects Office (SPO) & Authorized Organizational Representative (AOR)	<input type="radio"/> Proposal not shared <input type="radio"/> View only access <input checked="" type="radio"/> Edit access <input checked="" type="checkbox"/> Allow proposal submission (AOR only)	View SPO/AOR Personnel

3

Save Proposal Access

Proposal Main Page

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).

Proposal Actions ⓘ

Share Proposal with SPO/AOR ⓘ

Initiate Proposal Submission

☒ Check Error(s) and Warning(s)

Manage Personnel and Subaward Organizations



2



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

Senior/Key Personnel Add co-Principal Investigator Add Other Senior/Key Personnel

Personnel Name	Role	Organization	Actions ⓘ Details
Kristi L Winseck	Principal Investigator	University of Colorado at Boulder	Remove from Proposal ⓘ Change Role ⓘ

Show All ⌵

Showing 1-1 of 1



3a

Other Authorized User(s) - Data preparation only ⓘ Add Other Authorized User

Personnel Name ⌵	Organization ⌵	Actions
There are currently no Other Authorized Users.		



3b

Make sure you select the correct organization. The PI must 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

Email

OR

William.Taylor@colorado.edu

Search

Select	Personnel Name	NSF ID	Email	Organization
<input checked="" type="radio"/>	William T Taylor	000683132	w*****@colorado.edu	University of Colorado at Boulder
<input type="radio"/>	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



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.			


➡


1


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** OR **Unique Entity Identifier (UEI)** [What is a UEI?](#)  3 **Search**

Show All  Showing 1-3 of 3

Select	Organization Name	Unique Entity Identifier (UEI)	Address
<input type="radio"/>	BLACKHORSE SOLUTIONS, INC. View SAM Legal Business Name	CFKVXZJ329K7	13461 SUNRISE VALLEY DR BLDG 8 HERNDON, VA 20171-3283 US
<input checked="" type="radio"/> 4 	SAWHORSE REVOLUTION View SAM Legal Business Name	G811TFYAU219	801 2ND AVE STE 501 SEATTLE, WA 98104-1509 US
<input type="radio"/>	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
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	

6
See Section 1
above for
adding

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.

Proposal Actions ⓘ

- Initiate Proposal Submission
- Check Error(s) and Warning(s)
- Manage Personnel and Subaward Organizations
- Link/View Collaborative Proposals
- Print Proposal
- Return to PI



2



Link/View Collaborative Proposals

Collaborative Proposals					Link Collaborative Proposals
Temporary ID Number	Principal Investigator	Organization	Proposal Status	Actions	
No proposals have been linked.					

Link Collaborative Proposals



Enter the Temporary ID Number ⓘ of the non-lead proposal you want to link to:

Temporary ID Number



3 Enter the Proposal ID that the

Note: Once proposals are linked, the Principal Investigator's contact information will be shared.

4



Send Link Request

Cancel



✓ You have successfully invited Proposal - 15630 to link to this proposal. The proposals will become linked once the non-lead views their proposal and accepts the link. ✕

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 invitation has been accepted.

4. To have your proposal linked when another organization 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

NSF

Res

ONLINE

FOR THE

My Desk

Attention:

My Desktop > Proposal P

Proposal - 15630

Link Collaborative Proposals Request

The following proposal is requesting to link to your proposal 15630:

Temporary ID Number:

15623

Proposal Title:

Collaborative Research: Kristi test project #2

Principal Investigator:

Kristi Winseck

Organization:

University of Colorado at Boulder

Accept Link Request

Reject Link Request

Decide Later

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

- 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															
<table><thead><tr><th>Documents</th><th>Last Updated</th><th>Compliance Status [Key]</th></tr></thead><tbody><tr><td>Biographical Sketch</td><td></td><td>Document unavailable for check</td></tr><tr><td>Current and Pending (Other) Support</td><td></td><td>Document unavailable for check</td></tr><tr><td>Collaborators and Other Affiliations (Single Copy Document ⓘ)</td><td></td><td>Document unavailable for check</td></tr><tr><td>Synergistic Activities</td><td></td><td>Document unavailable for check</td></tr></tbody></table>			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
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

Personnel Direct Costs				
Section	Year 1			Total Funds Requested
	# Personnel	Months	Funds	
+ A. Senior Personnel <small>[Manage]</small>	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			Total Funds Requested
	# Participants		Funds	
+ 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 Estimation that your Proposal Analyst has prepared. If you discover you've omitted 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.
- 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.
- 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			Year 2			Total Funds Requested
	# Personnel	Months	Funds	# Personnel	Months	Funds	
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

- 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
-----------------------------------	----------	----------	-----------

SavePreview/PrintCancel



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 i	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

