

Completing a Proposal and Submitting for Routing

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How to Use this Guide

This guide will show you how to **complete** your proposal in RES and **submit** it to **routing** for Chair/Center Director/Dean **approval** and **ORA Review**. This guide is to be used **after** you have submitted a **draft budget**. This is the **second guide** that should be used when submitting a **proposal**.

The second step of ORA's internal deadlines is to complete your proposal and submit it for routing. Your proposal must be approved and in **ORA's queue for review 5 business days before the sponsor deadline**. **Submission** for **routing** should be done **minimally 6 business days** before the sponsor deadline.

- ★Reminder, according to [ORA's Internal Deadlines](#), all proposal documents must be final and complete at this point, except for the technical narrative documents which can be in draft form.

This guide leads you through the process to get your proposal ready to route.

The sections that are required to be completed within RES to submit a proposal to routing are:

- The sections that were previously required for you to submit a draft budget to ORA.
- Complete the additional following sections:
 - **Key Personnel**
 - Personnel
 - Credit Allocation
 - **Attachments**
 - Internal Tab
 - **Questionnaire**
 - UML Proposal Questionnaire
 - **Compliance** (If applicable)
 - **Budget**
 - Summary

Once you have completed all sections, turn on **Data Validations**, correct any issues and then click **Submit for Review**. This then sends your proposal into routing for approval by the Chair/Center Director and Dean.

Once those approvals are complete, the proposal is in ORA's queue for review.

Overview

This guide will take you through completing a proposal and submitting it for internal routing. This guide succeeds the Create Proposal and Submit Draft Budget & Justification document. If you have not created your proposal and submitted your draft budget for review, please start there. The job aid for this part can be found on the [RES Website](#).

The internal routing that occurs after you have submitted your proposal within RES captures the necessary approvals all proposals **must** have prior to being submitted to an external sponsor, as required by the [University of Massachusetts Board of Trustees Policy for the Development and Administration of Grants, Contracts and Cooperative Agreements for Sponsored Programs](#).

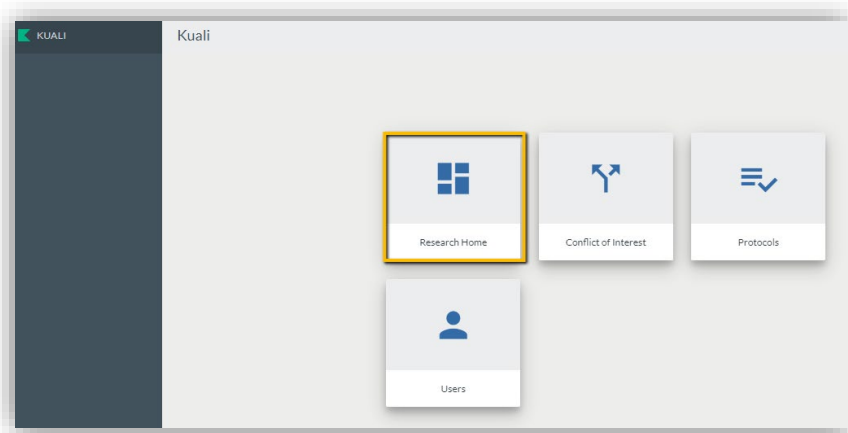
The required internal routing must also follow [UML's Internal Deadlines](#). These deadlines are based on when ORA **receives** the proposal in RES so be cognizant to give your approvers time to review and approve. We **recommend** submitting it **two days before** the **deadline**. It is the **responsibility** of the **PI** to ensure timely routing and adherence to [UML's Internal Deadlines](#).

This document may reference other guides in specific sections, if applicable to your proposal.

Logging in

Log onto RES using the following link: <https://uml.kuali.co/dashboard/>. RES uses single sign-on. To log-in use your regular UML credentials, as you would to access HR or your email.

Click the **Research Home** tile.



Research Dashboard and Finding In-Progress Proposal

Navigate to the upper right-hand corner of your Research Dashboard to find the Proposals Not Routing Section. This section shows any proposal that you have created, added to, or given access. Select the correct proposal to continue working.

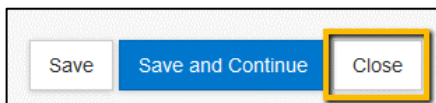


Complete Proposal

After selecting the correct in-progress proposal, RES will take you to the **Basics** screen of the proposal. All sub-sections under Basic should have been completed when submitting the draft budget and justification.

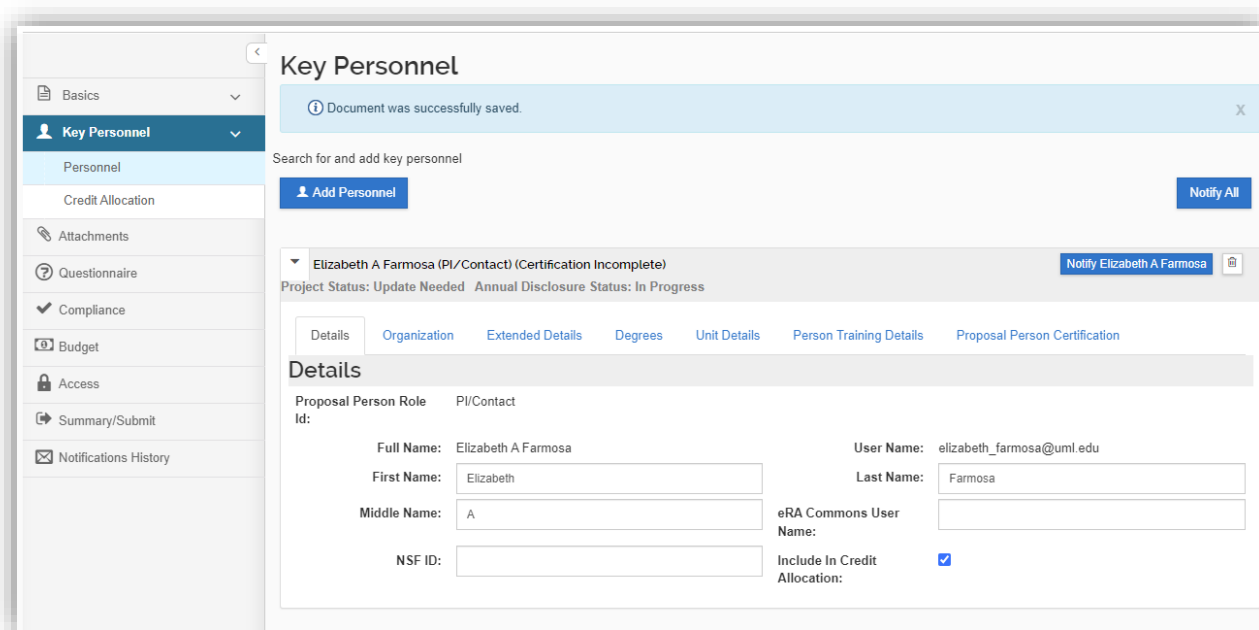
- ★ If something in these sections changes has changed from when you submitted your draft budget, alert your Grants and Contracts Administrator (GCA).

IMPORTANT: To avoid the proposal being locked for other users, if, at any point you are navigating away from your proposal, be sure to click the **Close** button otherwise it will be locked from the next person to go into it.



Key Personnel

This **screen** is where you **add** and **manage** Key Personnel for your proposal.



- ★ **Note:** Do **not** enter department/college contacts here. Some department/college personnel are already included in access granted to them for RES.

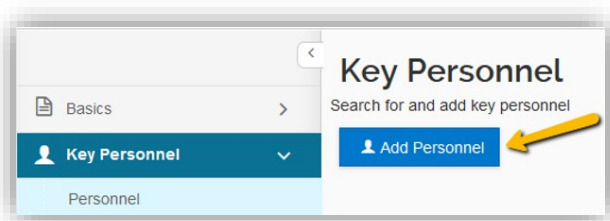
When **PIs**, **Co-I's** and **Senior Personnel** are added as Key Personnel on each proposal, they will **automatically** have the ability to **view** and **edit** that proposal. Please review the Quick Guide "Giving Access to Proposal" on the job aid section of the [RES website](#) to add others to the proposal.

- ★ **Note:** RES **does not use** the term **Co-PI**. If submitting a proposal to **NSF** where a person is a Co-PI, please use the Co-I designation. If submitting a **Multi-PI** proposal to NIH, that option will appear for use.

The following is a quick reference of what is entered in each section for Key Personnel.

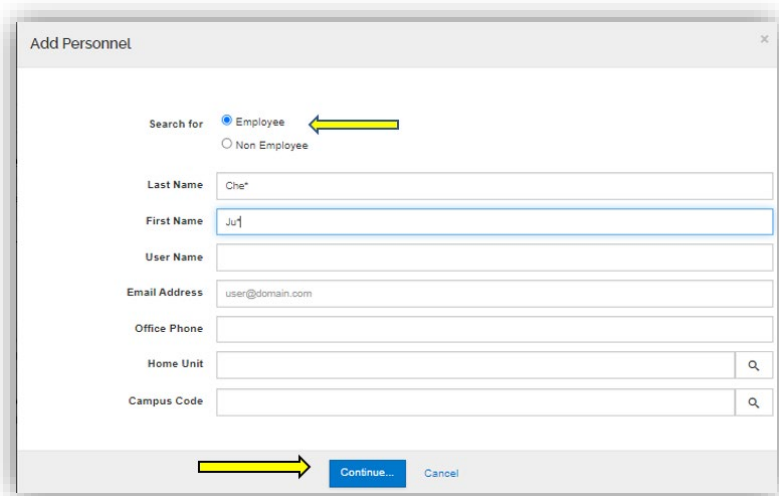
Adding a Key Person

Click the Add Personnel button.



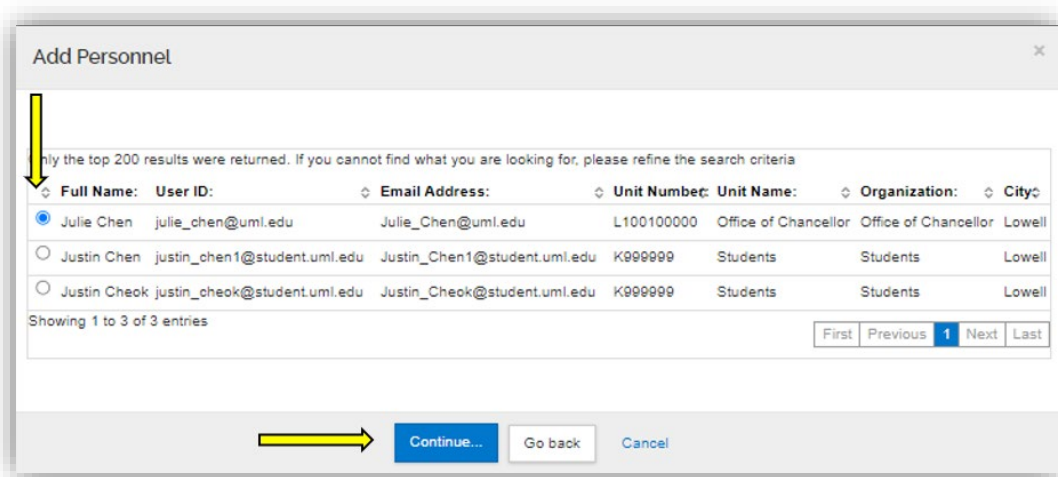
Enter the name of the UML employee and click Continue. Remember you can use the asterisk wildcard (*) to increase search results.

★ Only UML employees should be added as Key Personnel.



The screenshot shows the 'Add Personnel' form. The 'Search for' section has 'Employee' selected. The 'Last Name' field contains 'Che*' and the 'First Name' field contains 'Jul'. The 'Continue...' button is highlighted with a yellow arrow.

Select the correct person from the results and click Continue.



The screenshot shows the search results for 'Julie Chen'. The results table is as follows:

Full Name	User ID	Email Address	Unit Number	Unit Name	Organization	City
Julie Chen	julie_chen@uml.edu	Julie_Chen@uml.edu	L100100000	Office of Chancellor	Office of Chancellor	Lowell
Justin Chen	justin_chen1@student.uml.edu	Justin_Chen1@student.uml.edu	K999999	Students	Students	Lowell
Justin Cheok	justin_cheok@student.uml.edu	Justin_Cheok@student.uml.edu	K999999	Students	Students	Lowell

The 'Continue...' button is highlighted with a yellow arrow.

Select the appropriate **role** for the Key Person and click Add Person, then save.

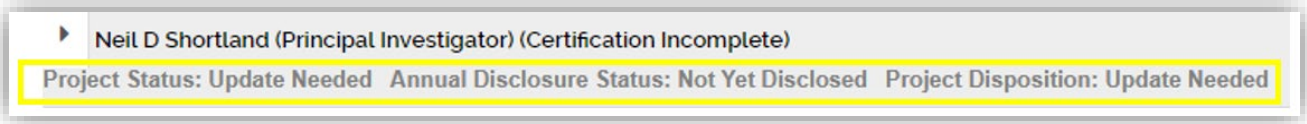
- **Proposal Role:** (PI, Co-Investigator, Multi-PI, or Key Person). All roles **EXCEPT** "Key Person" will be automatically added to the Credit Allocation Distribution.

★ **Note:** RES **does not use** the term **Co-PI**. If submitting a proposal to **NSF** where a person is a Co-PI, please use the Co-I designation. If submitting a **Multi-PI** proposal to NIH, that option will appear for use.

Conflict of Interest Disclosure

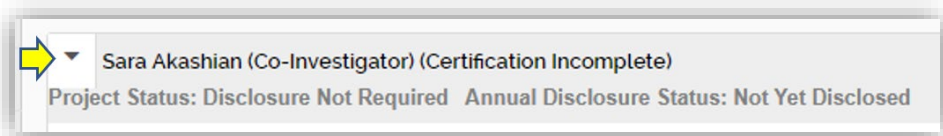
When a person is added as an investigator to a proposal it will automatically show the status of their Annual Disclosure. A conflict of interest annual disclosure is required to be submitted to the COI office at the time of proposal submission.

- An email will automatically notify the investigator if a disclosure needs to be completed or updated.



Details

Now click the arrow next to the Key Person's name to expand the details and other tabs for completion.



Details Organization Extended Details Degrees Unit Details Person Training Details Proposal Person Certification

Details

Proposal Person Role PI/Contact
Id:

Full Name:	Elizabeth A Famosa	User Name:	elizabeth_famosa@uml.edu
First Name:	<input type="text" value="Elizabeth"/>	Last Name:	<input type="text" value="Famosa"/>
Middle Name:	<input type="text" value="A"/>	eRA Commons User Name:	<input type="text"/>
NSF ID:	<input type="text"/>	Include In Credit Allocation:	<input checked="" type="checkbox"/>

Organization - Effort

The Organization tab shows the person's name, title, and address. All can be updated, if needed.

Key Personnel

Elizabeth A Famosa (PI/Contact) (Certification Completed and Answered By elizabeth_famosa@uml.edu - 07/18/2023 09:22 AM)
Project Status: Update Needed Annual Disclosure Status: In Progress Project Disposition: None

Details Organization Extended Details Degrees Unit Details Person Training Details Proposal Person Certification

Organization

Email Address:	<input type="text" value="Elizabeth.Famosa@uml.edu"/>	Office Location:	<input type="text"/>
Office Phone:	<input type="text" value="508-769-9119"/>	Address Line 1:	<input type="text" value="100 William T. Morrissey Blvd."/>
Fax:	<input type="text"/>	Address Line 2:	<input type="text"/>
Pager:	<input type="text"/>	Address Line 3:	<input type="text"/>
Mobile:	<input type="text"/>	City:	<input type="text" value="Lowell"/>
Primary Title:	<input type="text" value="Business Analyst-Elect Rpt Ad"/>	County:	<input type="text"/>
Directory Title:	<input type="text" value="Business Analyst-Elect Rpt Ad"/>	Country:	<input type="text" value="United States"/>
Home Unit:	<input type="text" value="L250500000"/>	Postal Code:	<input type="text" value="01854"/>
Division:	<input type="text"/>	State:	<input type="text" value="US-MASSACHUSETTS"/>
Secondary Office Location:	<input type="text"/>	Salary Anniversary Date:	<input type="text"/>
Faculty:	<input type="checkbox"/>		

Effort

Total Effort:	<input type="text"/>	Academic Year Effort:	<input type="text"/>
Calendar Year Effort:	<input type="text"/>	Summer Effort:	<input type="text"/>

The **Effort** tab is located at the bottom of the Organization tab.

The screenshot shows a form titled "Effort" with four input fields. On the left, a yellow arrow points to the "Calendar Year Effort" field. On the right, two yellow arrows point from the "Total Effort" field to the "Academic Year Effort" and "Summer Effort" fields. The "Total Effort" field is at the top left, "Calendar Year Effort" is below it, "Academic Year Effort" is at the top right, and "Summer Effort" is below it.

Enter **Year 1** Effort for the Key Person. Effort will be entered in **either** Academic/Summer or Calendar but never all three. **Leave Total Effort blank.**

Effort must be included for **all** Key Personnel and should be entered into this screen as a **percentage (without the % sign)**, not a person-month.

Effort is calculated based on **appointment type** (Calendar, Academic, & Summer) and must be entered into the corresponding box. If a person has **both summer** and **academic** effort on the budget, add the effort for each in the appropriate box.

Calculating Effort Percentage:

- **Calendar Year Effort (12-month appointments)**
 - Divide # of Months by 12 = % Calendar Year Effort
 - Ex: 2 calendar months / 12 months = 16.67% = Enter 16.67
- **Academic Year Effort (9-month appointments)**
 - Divide # of Months by 9 = % Academic Year Effort
 - Ex: 2 academic months / 9 months = 22.22% = Enter 22.22
- **Summer Term Effort (3-Month Term)**
 - Divide # of Months by 3 = % Summer Term Effort
 - Ex: 2 summer months / 3 months = 66.67% = Enter 66.67

★ **IMPORTANT Note:** *Effort for all key personnel and, in particular, **faculty, must be budgeted minimally at 1%.** This correlates to **0.12 calendar months or 0.03 summer months.** As noted, effort should typically be substantially more than 1% since it should reflect the actual effort needs of the project.*

*Occasionally effort is not required for key personnel – such as equipment, instrumentation dissertation, training grants. **In those cases where effort is 0%, please add 1% effort.** This data will assist with annual Effort Certification.

For more information on calculating effort, please visit the UMass Lowell's website:

<https://www.uml.edu/research/ora/proposal/budget-development/>

Extended Detail

This tab is NOT normally used for UMass Lowell Employees. No updates needed.

Details Organization **Extended Details** Degrees Unit Details Person Training Details Proposal Person Certification

Extended Details

Personal Information

Age by Fiscal Year: 0 Race:

KcPerson Id: 852738 Is Handicapped:

Handicap Type: Veteran:

Veteran Type: Has Visa:

Visa Code: Visa Type:

Visa Renewal Date: mm/dd/yyyy Directory Department:

Is Vacation Accrual: Is on Sabbatical:

Id Provided: PI Eligible:

Country of Citizenship: select Citizenship Type: US CITIZEN OR NONCITIZEN NATIONAL

Education

Education Level: Year Graduated:

Major: Degree: BA

School:

Degrees

This tab is NOT currently being used by UMass Lowell.

Details Organization Extended Details **Degrees** Unit Details Person Training Details Proposal Person Certification

Degrees

+ Add Degree

Unit Details

Details Organization Extended Details Degrees **Unit Details** Person Training Details Proposal Person Certification

Unit Details

Lookup/Add Multiple Lines

Show 10 entries

Unit Number	Lead Unit?	Actions
DEPT: Office Research Administration	L250500000	Lead Unit - Cannot delete <input type="button" value="Delete"/>

Showing 1 to 1 of 1 entries

The Key Person's home department is populated here. No data entry is required.

★**Note:** UMass Lowell cannot retroactively assign proposal to a different Lead Unit after the proposal is submitted to the sponsor.

Person Training Details

This piece will be used in future RES releases. This shows the CITI training an individual has completed if the individual's CITI profile has been linked to UML. For more information on syncing your CITI training account with SSO, visit the [UML IRB website](#).

Proposal Person Certification

Sara Akashian (Principal Investigator) (Certification Incomplete) Notify Sara Akashian

Project Status: Update Needed Annual Disclosure Status: Not Yet Disclosed Project Disposition: None

Details Organization Extended Details Degrees Unit Details Person Training Details **Proposal Person Certification**

Proposal Person Certification

[Clear All Answers](#)

By clicking I accept, you are affirming the below:
assurance that the information submitted within the application is true, complete and accurate to the best of the PI's knowledge.
certification that they are not currently suspended, debarred, or proposed for debarment or suspension from doing business with the Federal Government.
compliance of the proposal with applicable, institution, sponsor, federal, and state rules, regulations and guidelines
acceptance of responsibility to conduct and judiciously manage the project in accordance with the terms and conditions of the sponsoring agency and the institution in the event that this proposal is funded and accepted by the University.
UMASS resources necessary to complete the project are available or provisions have been arranged with the appropriate personnel to make such resources available in the event that this proposal is funded.
Assurances that they are in compliance with the Institution's [Patent Policy and Conflict of Interest Policy](#).

I accept

Proposal Person Certifications can be viewed and **completed** here.

- Certifications **must** be completed by all PI's, Co-I's and Key Personnel
- Certifications can be completed either **prior** to the proposal being submitted to routing or **as part of** the person's approval **during routing**.
- The certification can **only** be **completed** by the person who it is for (i.e. - not a proxy).
 - If you are **not** the person to accept the certification you can click the **Notify** button to request the person certify before routing. This sends an **email** to the person with a link directly to the certification page.
 - Once the person has certified, the notify button disappears.
- To **complete** the **certification** during **routing**, the Key Person will navigate to the Proposal Person Certification tab under their name within the Key Personnel section and click "I accept."

★ **Note:** The system will not allow the Key Person to **approve** the proposal until they have certified.

Credit Allocation

Credit allocation between personnel on the proposal is determined by the PI. This screen allows the PI to divide the credit.

UML has two types of Credit Allocations – a [RIF allocation](#) and a [Recognition allocation](#).

Only personnel with a **Department ID** can receive **RIF** allocation however **all personnel** in this section can receive **Recognition** allocation.

- It is the expectation that if someone is allowed to receive RIF credit, they would also receive Recognition credit. These may often be at the same percentage split. If someone is not able to receive RIF, then they would just have Recognition credit.

The credit allocations for *all* designated proposal personnel must total 100% for each credit allocation type. For example, the proposal below shows a PI and Co-I on a proposal. The RIF credit allocation between the two personnel is 70/30. The recognition credit between the two personnel is also 70/30. The RIF credit and the Recognition credit must always total to 100% between personnel.

The credit allocation for the unit (shown below as **DEPT**) should total 100% for each department listed for each personnel. On the DEPT line, 100% is always added for each space it is requested.

★ **Note:** Do not enter the percentage (%) sign as only numbers are permitted in these fields. So for a 70% credit allocation, only “70” should be entered. If you enter the percentage sign, you will receive an error when data validation is turned on.

Credit Allocation

Document was successfully saved.

	RIF	Recognition
Jan Kosny	<input type="text" value="70"/>	<input type="text" value="70"/>
L610500000 - DEPT: Mechanical Engineering	<input type="text" value="100"/>	<input type="text" value="100"/>
Unit Total:	100	100
Christopher J Hansen	<input type="text" value="30"/>	<input type="text" value="30"/>
L610500000 - DEPT: Mechanical Engineering	<input type="text" value="100"/>	<input type="text" value="100"/>
Unit Total:	100	100
Investigator Total:	100	100

Allocation Type	Definition
Research Investment Fund (RIF)	This is the allocation for PI overhead return funds.
Recognition	This is the intellectual contribution to the project. Often this will be the same as the RIF allocation. In cases where key personnel are ineligible for RIF, the RIF and Recognition credit allocations may be different.

Attachments

Depending on the **type** of proposal being submitted (Federal, Sub-Award, Industry), the **number of attachments** required to be **uploaded** in RES will **change**.

- **Proposal Tab** – Not currently being used. (Will only be used for S2S submissions)
- **Personnel Tab** – Not currently being used. (Will only be used for S2S submissions)
- **Abstract Tab** – Not currently being used. (Will only be used for S2S submissions)
- **Internal Tab** – Used for all proposals
- **Notes Tab** – Used for all proposals

Currently faculty submit proposals to sponsors **either** in a **sponsor’s portal** (*Research.gov, Grants.gov, EERE, ProposalCentral, etc.*) or through an **email** (*sub-award proposals, industry, certain non-profits*). Both ways will utilize the **Internal** and **Notes** Tabs.

★ **Note:** In a future release of RES, UML will begin submitting grants.gov proposals through System-to-System submission.

Required Attachments for Emailed Proposals

Internal Tab – All internal items that UML needs to complete review **and** all documents that need to be submitted by email to a sponsor, if applicable.

[Internal Tab Document Requirements \(for emailed proposals\)](#)

- **Budget – UML Internal**
- **Budget Justification**

- **Sponsor Required Documents** (*Sponsor Budget Template, Statement of Work, Proposal Narrative, CVs, etc.*)

★ **IMPORTANT Note:** According to [UML Internal Deadlines](#), all sponsor required documents, except for the final technical documents, **must be included** when routed for approvals. Draft **technical** documents **must be included** as [placeholder documents](#) at this time.

- **Sub Award Documents**, if applicable (*Sub-Recipient Commitment Form, Sub Budget, Sub SOW, etc.*)
- **Internal Communication**, if applicable
- **Cost Share Approval Form**, if applicable
- **F&A Waiver Approval Form**, if applicable
- **Limited Submission Approval**, if applicable
- **Request for PI Status Approval**, if applicable

Notes Tab – Internal Notes to UML. These are **not** submitted to the sponsor.

- Include any notes that need to be communicated to ORA. This is **not** submitted to the sponsor.

Required Attachments for Proposals Submitted through Sponsor Portals

Internal Tab – All internal items that UML needs to complete internal review. This **does not** include the sponsor required documents that will be **uploaded** in a **portal**. ORA will **review** those documents **within** the **portal**.

★ **Note:** While the sponsor documents are not required to be uploaded within RES, the final documents should still be available in the sponsor portal for ORA to review according to the [UML Internal Deadlines](#).

Internal Tab Document Requirements (for proposals through **sponsor portals**)

- **Budget – UML Internal**
- **Budget Justification**
- **Sub Award Documents**, if applicable (*Sub-Recipient Commitment Form, Sub Budget, Sub SOW, etc.*)
- **Internal Communication**, if applicable
- **Cost Share Approval Form**, if applicable
- **F&A Waiver Approval Form**, if applicable
- **Limited Submission Approval**, if applicable
- **Request for PI Status Approval**, if applicable

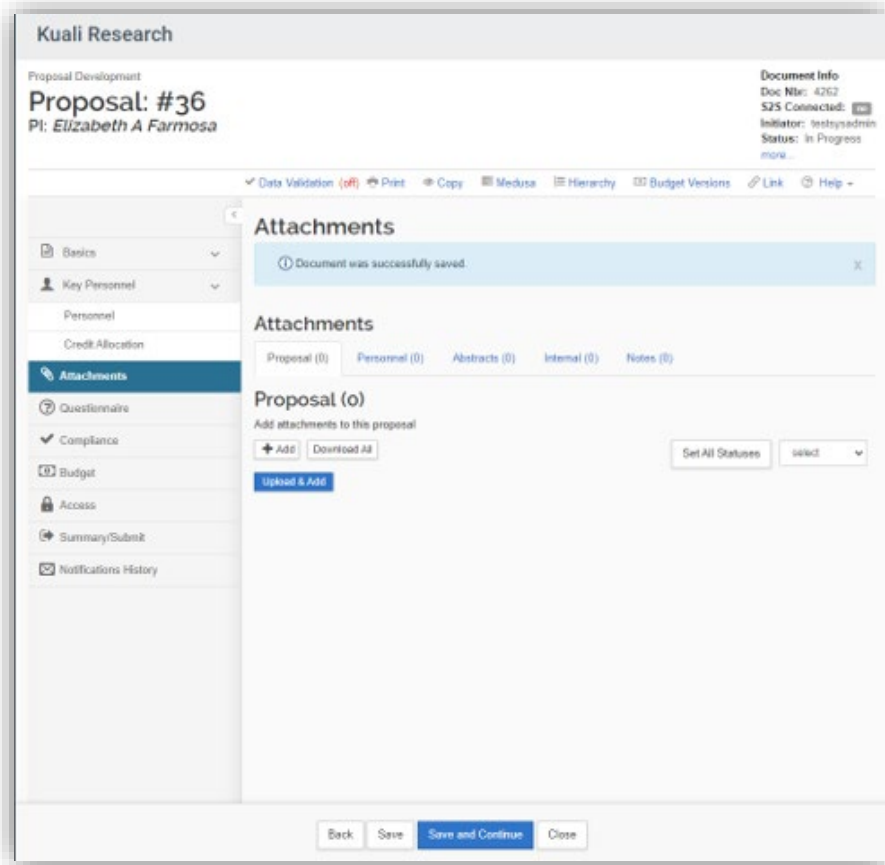
NOTES TAB – Internal Notes to UML. These are **not** submitted to the sponsor.

- Include any notes that need to be communicated to ORA. This is not submitted to the sponsor.

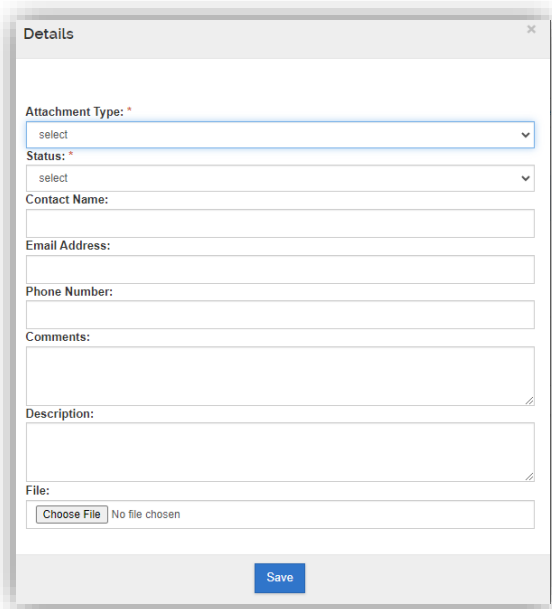
Adding Attachments

To add an attachment to any tab, click the **+Add** button for single attachment uploading. The Upload & Add button will allow you to upload multiple attachments at a time or you may simply drag and drop attachments.

PLACEHOLDER DOCUMENTS – Placeholder documents **must** be added within RES for any **technical** document (*narrative, abstract, references, etc.*) that will be submitted in an emailed proposal but is not final when the proposal is routed internally. When a proposal is routed internally, RES **does not** allow new documents to be uploaded. A placeholder document **must** be there so the final document can replace it.



On the pop-up, complete the attachment details, choose the file, and save.



★ **Note:** Files with spaces instead of underscores may create warning messages. Be sure to follow any file naming convention requirements as defined by agency and program proposal guidelines.

Preproposal Forms

This section of RES houses internal forms that may be needed **internally** to submit your proposal. They are:

- Request for New Sponsor
- Request for a New Organization (*This would be a new sub-recipient organization*)
- Request for PI Status
- Cost Share Approval
- F&A Waiver

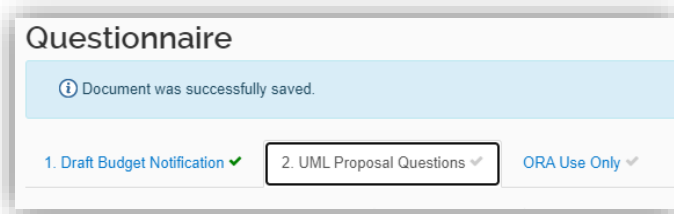
Starting one of these forms within this RES section will automatically populate the RES Proposal number on it. You may also start these forms through the links on the [RES Webpage](#).

Instruction guides for each form are on the [RES webpage](#).

Once a form is completed and approved, an email with the **PDF** will be sent to the PI. This PDF must be **uploaded** in the **Attachments** section **prior** to the proposal being **routed** to ORA.

UML Proposal Questions

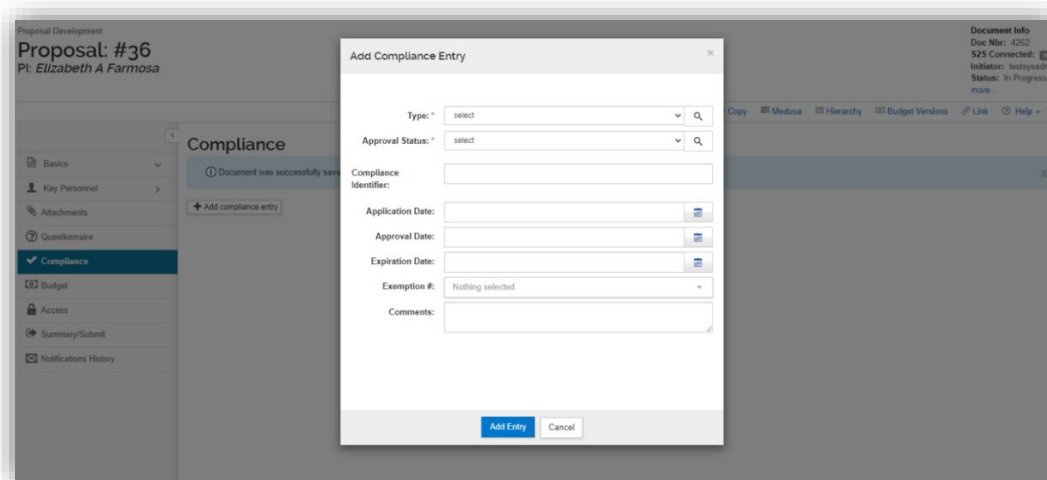
Complete **UML Questionnaire** – all questions are **required** to be answered.



Compliance

Here is where you capture compliance-related Protocol details (ex. - IRB, IACUC, Biohazards) by clicking **Add Compliance Entry**.

Click **Add Compliance Entry**



- Choose the **Type** and **Approval Status** for each entry that applies to this proposal.

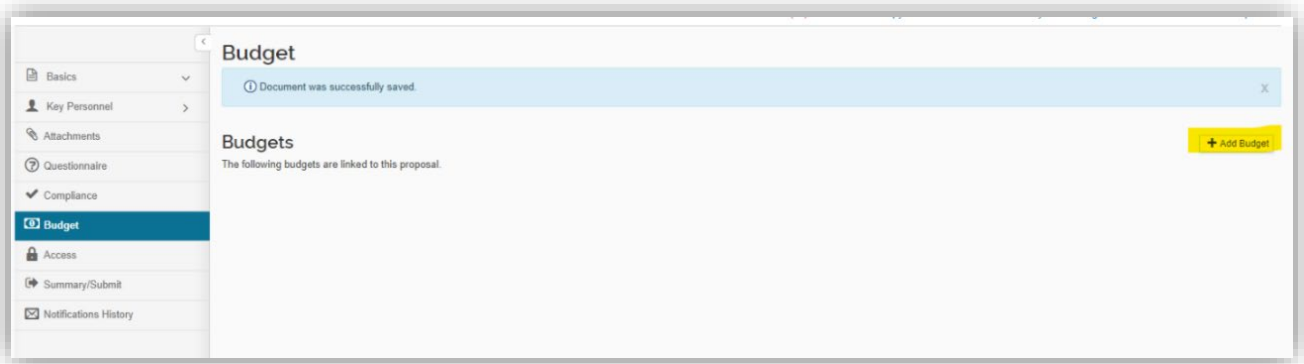
- **Type:** Vertebrate Animals, Biohazard Materials, Human Subjects, Foreign Component, Recombinant DNA,
- **Approval Status:** Approved, Exempt, Not Yet Applied, Pending
- **Compliance Identifier:**
 - If there is an approved protocol at the proposal stage, enter the information here. Otherwise leave it blank.

Budget

When creating a budget, you have a choice between selecting a Detailed or Summary budget. **Detailed budgets are only required for S2S submissions and are currently not being used.**

Summary budgets are currently required for all submissions.

1. Click the **+Add Budget** button



2. Enter a Budget Name (this is a required field).
3. Select 'Start a **summary budget**' radio button.
 1. If the question **"Will this be a Modular Budget"** shows, please choose **"NO."**
4. Click **Create Budget** and then follow instructions for [Creating a Summary Budget](#).

A screenshot of a 'Create a Budget Version' dialog box. It displays the following information: 'Proposal: 204', 'Budget Name: *' with a text input field containing 'TEST', and two radio button options: 'Start a detailed budget' (unselected) and 'Start a summary budget' (selected). Below these are two more radio button options: 'Will this be a modular budget?: *' with 'Yes' (unselected) and 'No' (selected). At the bottom, there are two buttons: 'Create Budget' (highlighted in blue) and 'Cancel'.

Creating a Summary Budget (Required)

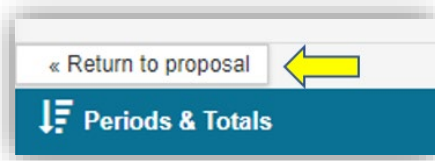
Navigate to **Periods and Totals** section and enter in all direct costs, F&A Costs and Cost Sharing, as applicable. **Do not use** Unrecovered F&A, Cost Limit or Direct Costs Limit.

- **Direct Costs:** Enter in the total direct costs for each period.
- **F&A Costs:** Enter the total indirect costs for each period.
- **Unrecovered F&A:** Do Not Use
- **Cost Sharing:** Enter the total cost share amount (including cost share IDC) for each year.
- **Cost Limit:** Do Not Use
- **Direct Cost Limit:** Do Not Use

Click **Recalculate with Changes** to generate the **Total Sponsor Cost**.

Period Start Date	Period End Date	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
01/01/2024	12/31/2024	12.0	156,500.00	100,000.00	56,500.00	0.00	0.00	0.00	0.00	[trash icon]
01/01/2025	12/31/2025	12.0	156,500.00	100,000.00	56,500.00	0.00	0.00	0.00	0.00	[trash icon]
01/01/2026	12/31/2026	12.0	156,500.00	100,000.00	56,500.00	0.00	0.00	0.00	0.00	[trash icon]
Total:			469,500.00	300,000.00	169,500.00	0.00	0.00	0.00	0.00	

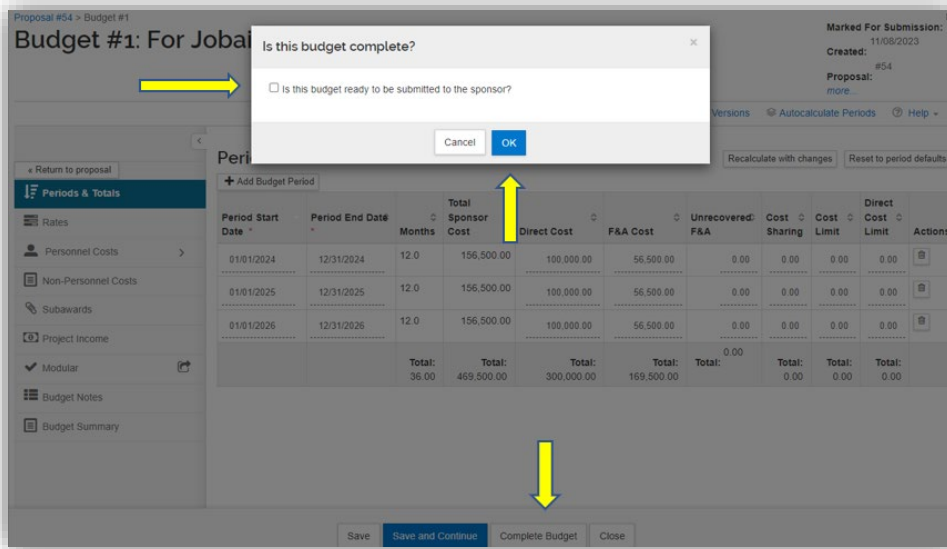
If **not final**, click **Save**. You can now navigate to other screens by clicking Return to Proposal and come back to update the budget when ready.



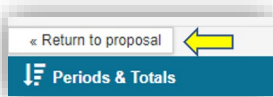
If **final**, click **Complete Budget**. A popup screen will ask if this budget is ready to be submitted to the sponsor.

Check the **box** and click **OK**.

★ **Note:** You will not be able to submit your proposal into routing until you have clicked Complete Budget and checked that it is Ready to Submit to Sponsor.

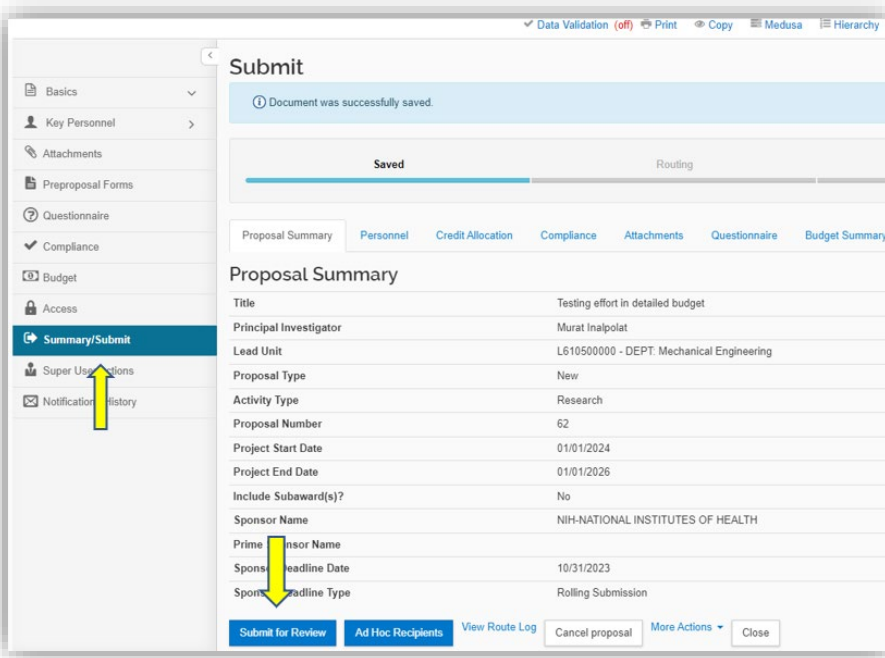


You can now return to your proposal by clicking **Return to Proposal**.



Summary and Submit

When the proposal is ready to be routed for internal approvals, select the **Summary and Submit** section. Review to make sure everything is correct and click **Submit for Review**.



If no errors exist your proposal has been submitted for routing. It will now go through required approvals before landing in ORA's queue for review.

If there are any errors in the proposal, a **Data Validation** screen will appear and list what the error is and a button titled **Fix It** will guide you right to the error. These **must** be **corrected** before you can route the proposal.

★**Note:** When you **submit** for **review**, you may receive a message asking if you wish to receive **future approval requests** if you also appear in a future workflow stop. – clicking yes will require you to approve again at the future stop, whereas, clicking no will automatically approve on your behalf at the future stop.

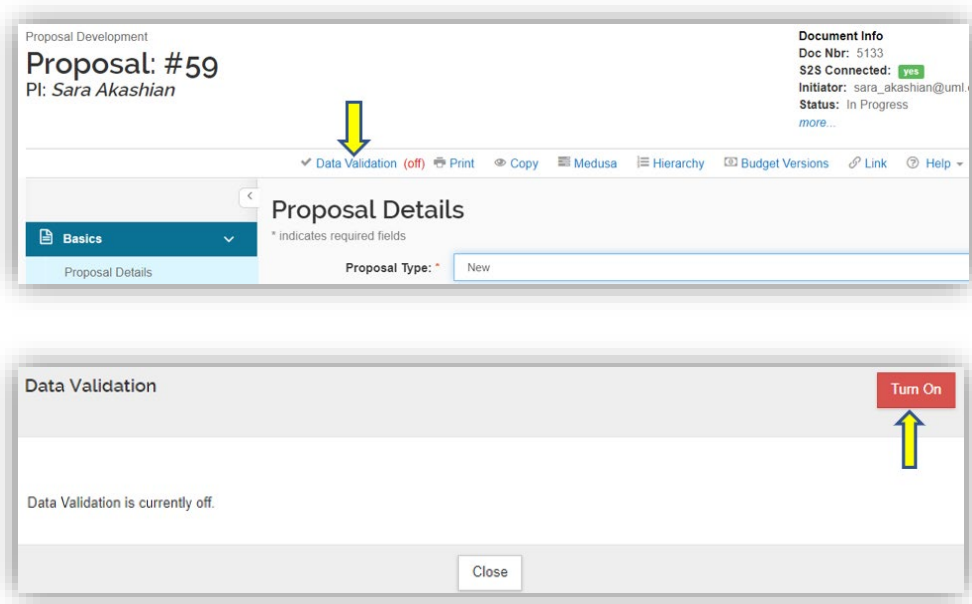
- Example - If a PI is submitting their proposal for review within their own account, they will get this request because they are also on the workflow to approve the proposal. Clicking “no” will automatically approve the proposal for the PI.

Data Validations

Data Validations may also be checked before you attempt to route the proposal. Data Validations is located on the top row of the proposal screen. It always defaults to **off**. You may turn on Data Validation while you are entering a proposal or right before you submit the proposal for routing.

If Data Validation is turned on while completing each section, RES will not allow you to move forward to the next section until all validations have been fixed.

To turn on Data Validation, click the link and select Turn On.



A screen will then pop up that shows you items that must be fixed before the proposal can be submitted for routing. A **Fix It** link on the right-hand side of the screen will take you directly to the error.

Data Validation					Turn Off
Show <input type="text" value="10"/> entries		Search: <input type="text"/>			
Area	Section	Description	Severity	Actions	
Error					
Key Personnel		The Investigators are not all certified. Please certify Murat Inalpolat.	Error	Fix It	
Key Personnel		The Investigators are not all certified. Please certify Cordula V Schmidt.	Error	Fix It	

Recall a Proposal

Once a proposal has been submitted for review, the aggregator and the PI have the ability to recall the proposal for additional editing. This action can be taken in the Summary/Submit section of the proposal. As part of the recall action, you must enter a reason for the action in the confirmation window that appears. Once recalled, the proposal will once again populate in the Proposals not routing tile in the Dashboard and may be edited.

