

HOW TO CREATE A PROPOSAL AND SUBMIT A DRAFT BUDGET AND JUSTIFICATION TO ORA

Overview

The first step of ORA's <u>internal deadlines</u> is to create a proposal and submit a draft budget and justification within **RES** 12 business days before the sponsor due date. **Only** the below sections are **required** to submit this draft budget to ORA for review.

Step 1 – Log into RES, navigate to the Research Home tile, click Common Tasks and Create Proposal.

			SANE	BOX ENVIRONMENT				
KUALI RESEARCH	Common Tasks							
Dashboard Q. Search Records	Quick Links	Award		соі	Institutiona	il Proposal	Negotiation	
Common Tasta	Action List Dos Bearch Current & Pending Support Penson Training View S2S Submissions Looks	All My Awards Create Award Search Awards		My Disclosures Creats Creats Search Search		itutional Proposal posal Log titutional Proposale posal Logs	All My Negotiations Create Negotiation Search Negotiation	
	Proposal Development Protoc All My Proposals Create Proposal Search Proposal		Protocols Manage Pro	Protocola		Subaward Create Subaward Search Subawarda		

Step 2 – On the **Create Proposal** screen, complete all required and applicable questions and click Save and Continue.

*Reminders:

- **Proposal Sponsor** is UML's direct sponsor. If UML is a sub-recipient on a proposal, this would be the organization that is sub-contracting to UML.
- **Originating Sponsor** field is used if the funds from our direct sponsor are coming to them from another agency/foundation/non-profit/company. For Example If UML is a sub-recipient to Boston University where Boston University is submitting to Department of Energy, the Department of Energy is listed in the Originating Sponsor field.
- **Sponsor Deadline** is the date UML's proposal documents are due. If UML is a sub-recipient, this is the date the lead organization is requesting UML's documents.

Create Proposal * indicates required fields				
Proposal Type: *	select			*
Lead Unit: *	select			-
Activity Type: *	select			~
Project Dates: *	mm/dd/yyyy	to	mm/dd/yyyy	
Project Title: *				
				li.
Sponsor: *				Q
Originating Sponsor:				۹
Opportunity ID:				

Office of Research Administration

oraproposals@uml.edu



Step 3 – Complete all required and applicable questions within the four sections (Proposal Details, Delivery Info, Sponsor & Program Information, Organization & Location) under the Basics screen in RES.

*Note: If an S2S Opportunity section appears, leave blank. This will be utilized in a future roll out.

*Note: The Research Science Code under Sponsor & Program Information is a required field. Click within the field to display the drop-down list options; scroll through the list and highlight and select the choice most relevant to the proposal.

Basics ~	Proposal Details * indicates required fields				
Proposal Details	Proposal Type: *	New			~
Delivery Info	Lead Unit:	L621000000 - DEPT: Criminal Justice			
Sponsor & Program Information	Activity Type: *	Research			~
Organization and Location	Project Dates: *	01/01/2024	to	12/31/2026	
L Key Personnel >	Project Title: *	Studying Criminal Justice			
N Attachments					
Preproposal Forms	Sponsor *	000002012		ROSTON UNIVERSITY	0
Questionnaire	sponsor.	000000015			~
✓ Compliance	Originating Sponsor:	0000003254		U.S. DEPARTMENT OF JUSTICE	۹

Step 4 – Navigate to the **Attachments** screen. Within the **Internal Tab**, upload your **draft budget** and **justification**.

*Reminder – the budget must be on the <u>UML template</u>.

Additional documents, if applicable, should be uploaded under this tab as well. Examples of additional documents include: Solicitation PDF, Limited Submission Approval, Request for PI Status.



	🛩 Data Validation (off) 🖶 Print
	Attachments
Basics V	 Document was successfully saved.
Attachments	Attachments
Preproposal Forms Questionnaire	Proposal (0) Personnel (0) Abstracts (0) Internal (0) Notes (0)
✓ Compliance	Add Download All
Budget Access	Upload & Add
Summary/Submit	
Super User Actions Notifications History	

Step 5 – Navigate to the **Questionnaire** section. Review and complete the **Draft Budget Notification** questionnaire. When all questions are answered "**Yes**" you can click **Save.** This will generate an email notification to ORA that a draft budget is ready for review.

<u>*NOTE</u>: If any of the answers in the Draft Budget Notification questionnaire are answered as "**no**," an email notification **WILL NOT** be sent to **ORA**. Please review the questions, **update** your documents as needed to comply, answer "**yes**" and then click **Save**.

QUICK GUIDE



	✓ Data Validation (off) 🖶 Print 🛛 ⊕ Copy 📰 Medusa				
	Questionnaire				
Basics 🔨	(i) Document was successfully saved.				
L Key Personnel					
N Attachments	1. Draft Budget Notification V 2. UML Proposal Questions V				
Preproposal Forms	1. Draft Budget Notification (Incomplete)				
Questionnaire	When you have checked all of the options on this questionnaire a notification will be sent to the Office of Research Administr				
✓ Compliance	and proposal. Please note this must be done 12 business days in advance of the deadline.				
Budget	I have completed my draft budget and budget justification on the UML Internal Template				
Access	⊖ Yes				
Summary/Submit	O No				
Super User Actions	I confirm I am following University and Sponsor policies.				
Notifications History O No					
	I have uploaded documents to the Internal section of the Attachment tab. Yes No				
	Back Save Save and Continue Close				

At this point your draft budget and justification are with ORA. A Grants & Contracts Administrator will review your budget and justification and return comments within two business days.

Budget comments and any **updated documents** will be **returned** to the **PI** within the **RES** system. The PI will receive an **email** notification with **comments** and if any documents have been updated they will be uploaded within the **internal tab** of the RES proposal.

If **no further edits** on the budget and justification are needed, the GCA will **approve** a budget and budget justification by sending a **notification** to the PI stating the documents are **final**. The PI may then **complete** the rest of the **proposal** and **route** for approvals.

If further back and forth is needed on the budget between the **PI** and **ORA**, the PI should upload the updated budget documents within the **Internal Tab** in RES and **notify** ORA they are there for review. The PI can notify ORA within RES by going to the **Summary/Submit** section, clicking **More Actions** and then Send **Notification**.