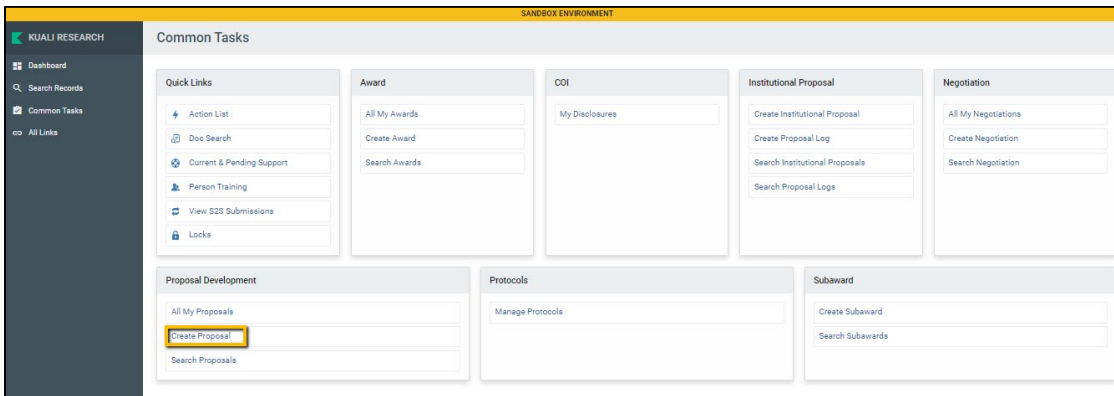


## HOW TO CREATE A PROPOSAL AND SUBMIT A DRAFT BUDGET AND JUSTIFICATION TO ORA

### Overview

The first step of ORA's [internal deadlines](#) 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**.



**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: \*

Lead Unit: \*

Activity Type: \*

Project Dates: \*  to

Project Title: \*

Sponsor: \*

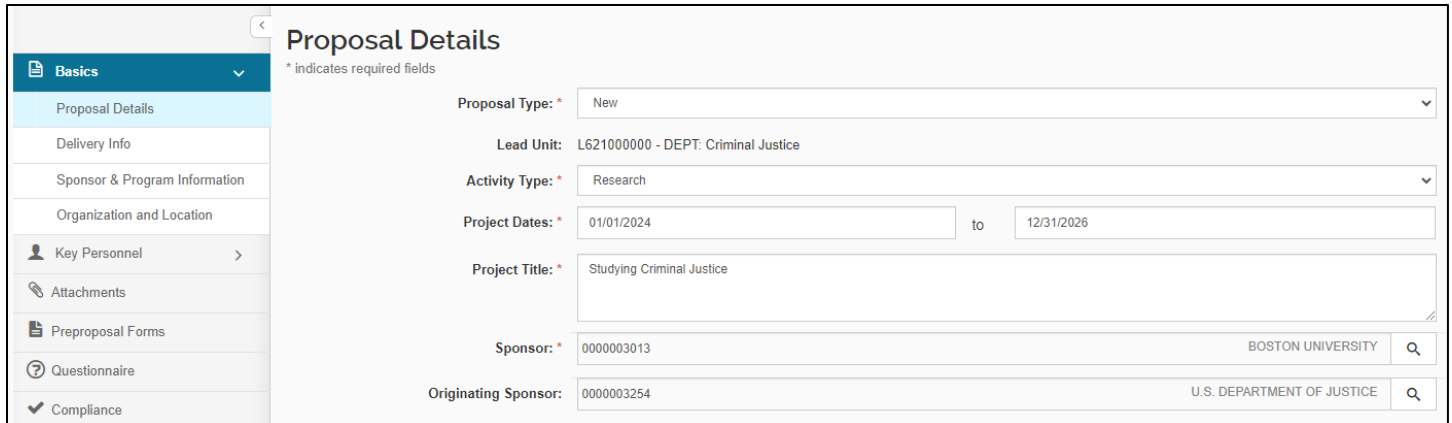
Originating Sponsor:

Opportunity ID:

**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.



**Proposal Details**  
\* indicates required fields

Proposal Type: \* New

Lead Unit: L621000000 - DEPT: Criminal Justice

Activity Type: \* Research

Project Dates: \* 01/01/2024 to 12/31/2026

Project Title: \* Studying Criminal Justice

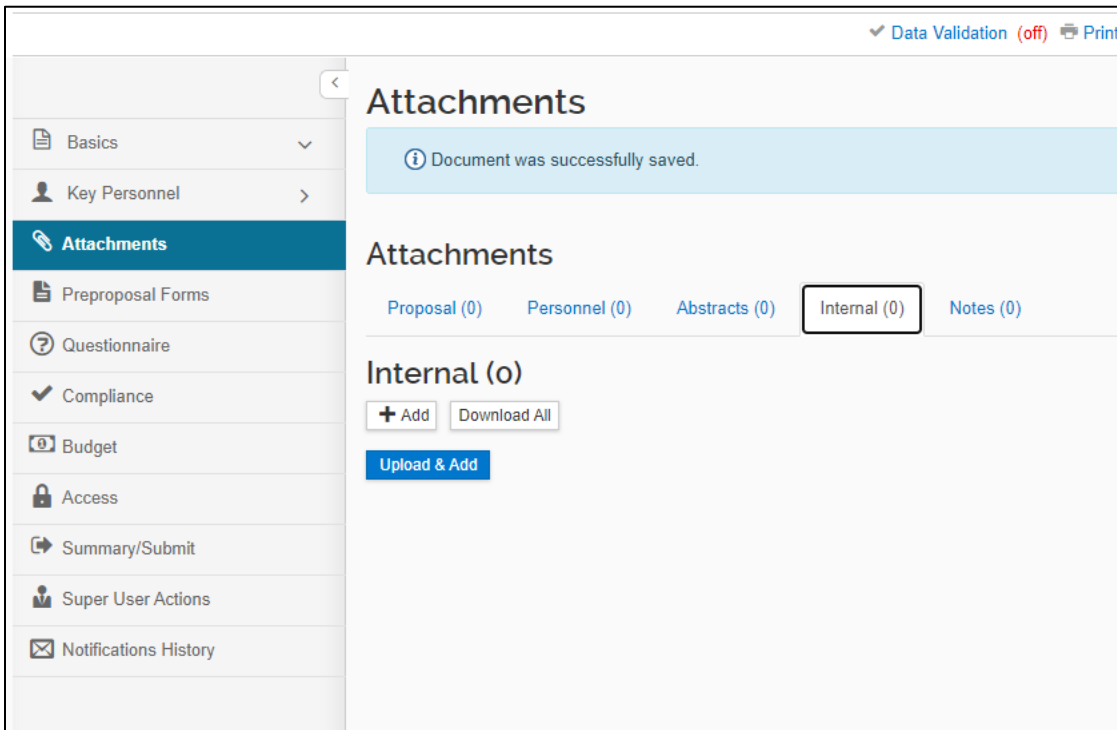
Sponsor: \* 0000003013 BOSTON UNIVERSITY

Originating Sponsor: 0000003254 U.S. DEPARTMENT OF JUSTICE

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

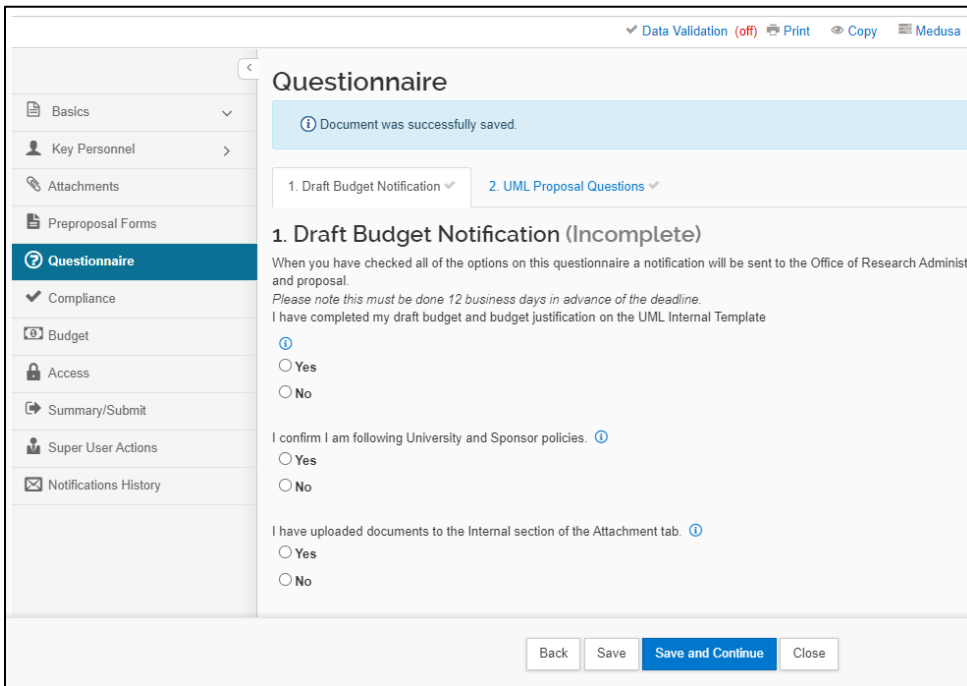
**\*Reminder** – the budget must be on the [UML template](#).

**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**.



**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.

**\*NOTE:** 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**.



Questionnaire

Document was successfully saved.

1. Draft Budget Notification 2. UML Proposal Questions

**1. Draft Budget Notification (Incomplete)**

When you have checked all of the options on this questionnaire a notification will be sent to the Office of Research Administration and proposal.

*Please note this must be done 12 business days in advance of the deadline.*

I have completed my draft budget and budget justification on the UML Internal Template

Yes

No

I confirm I am following University and Sponsor policies.

Yes

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**.