


UD Financials Job Aid

Research Admin: Required Proposal Entry Fields

Field	Location
Description	Proposal Tab
Short Title (Sponsor Acronym first; max 30 characters)	Proposal Tab
Full Title (as submitted to Sponsor)	Proposal Tab
Principal Investigator name	Proposal Tab
Program	Proposal Tab
Proposal Type	Proposal Tab
Proposed Start and End Dates	Proposal Tab
Sponsor Due Date and Deadline Type	Link from Proposal Tab
Additional Information: <ul style="list-style-type: none"> SOL (Solicitation Info) is required These categories are <i>required, if applicable</i> : <ul style="list-style-type: none"> FLW (Flow through) and Prime Sponsor LMT (Limited Submission) 	Link from Proposal Tab
Location (PI's office address auto-fills, edit if needed)	Link from Proposal Tab
Keywords	Link from Proposal Tab
Description (auto-fills from Proposal Tab)	Project Tab
Project Title(s) <ul style="list-style-type: none"> Primary project's title should match Short Title on the Proposal Tab Subsequent Projects should have unique titles (max of 30 characters) 	Project Tab
For each Project: <ul style="list-style-type: none"> Department Subdivision (= College/Institute) Institution (UD) 	Project Tab
F&A Distribution for each Project Enter percentage for the units to whom F&A should be distributed. Together they should total 100%. Typical entries are: <ul style="list-style-type: none"> Department College/Institute Required institutional entries are: <ul style="list-style-type: none"> Research Office (2.5%) EHS (1%) RSCH UNEMPL (0.5%) 	Project Tab

<p>F&A and Pricing Set-up (for each project):</p> <ul style="list-style-type: none"> • Pricing Method (always = None) • Product (always = NON) • Rate Type (choose as applicable) • FA Base (choose as applicable) 	<p>Link from Budget Tab</p>
<p>Budget Detail A detailed budget, separated into budget periods, should be entered for each Project.</p>	<p>Budget Tab</p>
<p>Salary details for the PI, all co-PIs and all Key Persons should be entered on separate budget lines and include the salary amount, fringe benefits amount and the amount of effort being committed by the individual.</p>	<p>Budget Tab – Person Detail Screen </p>
<p>Non-salary budget lines should be entered using the budget item applicable to the type of expense.</p>	<p>Budget Tab</p>
<p>If the budget includes salary for any Graduate Students, tuition must be included in accordance with UD Tuition Policy for sponsored funding. (unless the Sponsor does not allow the funds to be used for tuition costs)</p>	<p>Budget Tab</p>
<p>Professional Section Enter names of the PI, all co-PIs and all Key Persons and their roles</p>	<p>Resources Tab</p>
<p>Subrecipient Section Must Complete if there will be Subaward(s) Enter name of each subrecipient organization</p>	<p>Resources Tab</p>
<p>Certification Code and Protocol Status is required for each type of regulated activity applicable to the proposed work: Human Subjects, Vertebrate Animals, rDNA, Hazardous Materials, Radiation, Infectious Agents, Select Agents, Stem Cells, Export Controls, Environmental Certification, Clinical study, Clinical Trial Phase I, II, or III, Conflict of Interest exists, Patent involved, a special Permit is required</p> <p>In addition, if equipment is included in the budget, you must enter the following two certification codes: EQUIP (Equipment) and RENO (Facility Renovation required for this equipment: Yes or No)</p>	<p>Certification Tab</p>
<p>Following Attachments are required for all proposals:</p> <ul style="list-style-type: none"> • Abstract (summary of proposed project work) • Budget Justification (must be final when the proposal webform is routed for internal approvals) 	<p>Attachments Tab</p>

<p>If requesting to use an F&A rate that is different than UD's negotiated F&A rate applicable to the type of proposal, <i>must attach</i>:</p> <ul style="list-style-type: none"> • Documentation from the Sponsor indicating that it is the Sponsor's policy to limit F&A to a specified percentage <p>OR</p> <ul style="list-style-type: none"> • PI's explanation of why the non-standard F&A rate is being requested 	<p>Attachments Tab (continued)</p>
<p>Subrecipient documentation required for each sub:</p> <ul style="list-style-type: none"> • Subrecipient Commitment Form • Budget • Budget Justification • Statement of Work • Provider Category Determination Worksheet completed by the PI • F&A rate agreement (if entity has one) • Contact and FFATA information entered on Attachment 3A and 3B forms 	<p>Attachments Tab (continued)</p>
<p>If the proposal is being submitted to a Limited Submission Solicitation, a pdf of the email or letter notifying the PI that her/his proposal was selected by the University to be submitted must be attached.</p>	<p>Attachments Tab (continued)</p>
<p>If the proposal is being submitted to the Sponsor via email, on paper, or in an e-System that is not accessible by the Research Office Contract and Grant Specialist, <i>pdf(s) of the entire proposal in its final form</i> must be attached.</p> <p>Note: The Budget and Budget Justification must be final when the proposal webform is routed for internal approvals. The final version of the rest of the proposal can added to the Attachments when it is completed.</p>	<p>Attachments Tab (continued)</p>
<p>Proposals being submitted to the UDRF or GUR programs, a pdf of the entire proposal printed from the Community Proposal System must be attached, when the proposal webform is routed for approvals</p>	<p>Attachments Tab (continued)</p>
<p>Additional documentation can be attached as needed.</p>	<p>Attachments Tab</p>