Creating a New S2S Submission

Use these instructions if you are creating a submission that is going to grants.gov. For example: New, NIH R01, Resubmission of a K Award, Competitive Renewal of an NIH Grant, or a New DOD Grant. For NSF grants, GCO encourages the use of Fastlane; then create a non-S2S application in InfoEd. For a transfer application, the PI should check with the GCO to determine whether the transfer is S2S or non-S2S

Published: 2/25/2011

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Creating an Original, System-to-System Proposal

These instructions tell you how to create an original proposal that will be submitted system-to-system to grants.gov.

If you have questions about system-to-system versus non-system-to-system submissions, see our FAQ page on the subject at http://osticket.mssm.edu/support/kb/faq.php?id=4.

Remember that an original proposal is for a competitive budget cycle; it represents new money.

You will need to complete these steps in one sitting. While this is one of the longer processes in InfoEd, it is also one of the simplest.

Estimated Time to Complete

15 to 20 minutes.

Prerequisites

You need access to the My Proposals module. After you log in, you should see My Proposals in the left menu bar.

Instructions

Each subsection in these instructions corresponds to a step in the setup questions.

1. Log in to InfoEd.

2. From the menu bar on the left side of the page, click My Proposals. The tab expands to show more menu options.

3. Click Create New Proposal. InfoEd launches a new window, the New Proposal Questionnaire:

Step 0: Select the PI

1. The logged in user (you) is automatically selected as the PI. If this is okay, skip to Step 1: New or Copy From Existing Proposal on page 3. If you are creating this proposal for someone else, you will want to change the PI and continue with these instructions.
2. Click the **Change PI** button. InfoEd displays the Personnel pick list:

![Personnel pick list screenshot]

3. Select the first letter of the person’s last name.

4. From the drop-down list, select the person:
5. Click the **Select** button. InfoEd returns you to Step 0, and you should see the PI that you selected:

<table>
<thead>
<tr>
<th>New Proposal Questionnaire</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 0</strong></td>
</tr>
<tr>
<td>Confirm you intend for the PI of this proposal to be Training, Renee S - or - Change PI now please</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Create a &quot;New&quot; Proposal or &quot;Copy From Existing&quot;?</th>
<th>Do you want to...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Create a New Proposal</td>
<td>Copy From Existing Proposal</td>
</tr>
</tbody>
</table>

6. Continue to **Step 1: New or Copy From Existing Proposal**.

**Step 1: New or Copy From Existing Proposal**

These instructions assume that you are creating a new, blank proposal. InfoEd also enables you to copy all of the settings, choices, and uploads from any proposal to which you have access, and use it as the starting point for a new proposal.

1. Ensure that **Create a New Proposal** is selected. This is the default.

2. Click the **Continue to Next Step** button.

**Step 1 Continued... (funding opportunity)**

1. You are creating a system-to-system application that will go the grants.gov. So, from the drop-down list, select **Select from Grants.Gov Opportunities**:

2. Click the **Continue to Next Step** button.

3. You are prompted to enter search criteria, to locate the funding opportunity:
4. Leave the S2S box checked. Enter search criteria into the field. This can be a word or words from the title of the opportunity, or the opportunity number. Then, click the Search button:

![Step 1 Continued....](image)

5. For the opportunity that you want, click the Select link. The system advances you to Step 2 of the questionnaire.

**Step 2: Proposal Type**

1. Select New Proposal or Competitive Renewal:

![New Proposal Questionnaire](image)

2. Click the Continue to Next Step button.

**Step 3: Select a Sponsor**

1. InfoEd presents a pick list of sponsors. The default sponsor for this opportunity is selected for you:

![New Proposal Questionnaire](image)
2. If there are alternate sponsors listing in SPIN for the opportunity that you selected, they will appear in the drop-down list:

   Step 3  Select a Sponsor

   ![List of sponsors](image)

   If you click the **Select from Full Sponsor List** button, the system will show all the sponsors in the system, not just the ones that are listed for this opportunity:

   ![Preferred list of sponsors](image)

   If you do this, you must ensure that you select the correct sponsor. Your selection is not being limited or confirmed by grants.gov or SPIN; you are on your own!

3. Either accept the default sponsor, or select a different sponsor. Then, click the Continue to Next Step button.

**Step 5: Enter the Proposal’s Title**

1. In the field provided, enter the title of your proposal.

   ![Enter title](image)

   If this project will also have a lab animal or human subjects protocol, use the same title for each of them in InfoEd, so that it will be easier to correlate them with each other.

2. Click the Continue to Next Step button.

**Step 6: Start and End Dates**

1. Enter the start date for your research. Either select it using the calendar icon next to the date field, or, enter it using one of these formats: 03/09/74, 03/09/1974, 030974, 03091974, 09-Mar-1974.

2. Enter the ending date for your research.

3. Ensure that you are not exceeding the number of years allowed for the type of mechanism that you selected (5 years for an R01, 3 years for an R03, etc.).
4. Click the **Continue to Next Step** button.

**Step 7: Years and Budget Periods**

1. Check that InfoEd has created one budget period for each year in the project.

2. Click the **Continue to Next Step** button.

**Double Check and Create Proposal**

InfoEd displays a screen where you can review the choices you made:

1. Review each of the choices that you made in the previous steps. Especially check the:
   
   - PI
   - Sponsor
   - Mechanism
   - Dates

2. If you need to change any choices, click **No, Go back and make changes**. You will be returned to the setup questions.

3. To proceed, click **Yes, Create Proposal**. InfoEd processes your answers, and advances you to the next page, Setup Questions (Step 8).

**Setup Questions (Step 8)**
The Setup Questions page displays.

**Submission Mechanism/Form Information**

1. Check your Proposal Sponsor. This is the last chance that you will have to easily change the sponsor.

2. Ensure that Please select a Submission Mechanism/Screen Template is set to the default of 424 R&R NIH Dynamic (electronic submission).

3. Check your Opportunity Number. This is the last chance that you will have to easily change it.

**Grants.Gov Submission Information**

The Grants.Gov Submission Information section is added to the page. This presents a bulleted list of restrictions and requirements that your application must meet. These are based upon the type of application that you have chosen. Normally, you do not need to do anything in this section.

If your application is an exception to the rules, and you need to override any of these restrictions, you should click the Mechanism Opt In/Out link. This will trigger a pop-up window containing the list of restrictions:

![Pop-up window with list of restrictions](image)

In the example above, suppose the researcher wanted to remove the requirement that “The R01 project period may not exceed 5 years.” In that case, the researcher would select the check box for that requirement, then click the Opt Out button. InfoEd would no longer check the length of the project.

**Before you opt out of any validations, be certain that this is both permitted and needed for your project. Check with your sponsor and the GCO.**
**Deadline Information**

1. The **Deadline Date** and **Deadline Time** should be filled in for you. These were taken from the Program Announcement. If they are not filled in, enter them. Please verify that the date is correct.

**General Proposal Properties**

1. For the question **Will you be including a Cover Letter...** selecting **Yes** creates a place to upload a cover letter into your application. The NIH requires cover letters for specific circumstances. Check your program announcement and the NIH website for more information.

2. For the question **Will your proposal include any Subcontractors?** selecting **Yes** enables you to add subcontractors to the Personnel. You will not be able to add a subcontractor if you select **No** to this question.

3. For the questions **Will your proposal involve the use of Human Subjects?** and ...**Laboratory Animals?**, answering **Yes** will require you to provide additional information later in the application.

4. For the question **Will your proposal involve multiple principal investigators?**, answering **Yes** creates a special tab in the PHS 398 Research Plan for uploading a multiple PI leadership plan.

5. Check to ensure that under **PI Departments**, there is only one department listed and that it is correct.

<table>
<thead>
<tr>
<th>Associated Departments</th>
<th>Add</th>
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<tbody>
<tr>
<td>Training Department</td>
<td></td>
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<td></td>
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</tbody>
</table>

6. Check to ensure that under **Associated Departments**, there is only one department and that it matches the **PI Departments**.

**Budget Setup Information**

1. Indicate if the majority of research will be conducted on or off campus.

2. Click the **Save and Continue** button.
3. InfoEd creates your proposal and advances you to the next tab. In this case it happens to be the SF424 form.

Next Steps

At this point, you can begin work on any of the other sections in your application.

If you need to change any of the Setup Questions, you can:

1. Select the Setup Questions tab.

2. Click the Completed check box to remove the check mark.

3. Redo the Setup Questions.

If you un-check the Completed check box in Setup Questions, any other sections that you have marked Completed will be uncompleted. You will need to remark them completed.