# Start a New Proposal

**USDA - National Institute of Food and Agriculture (System-to-System)**

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## Start a New Proposal

### USDA - National Institute of Food and Agriculture (System-to-System)

### Get Started

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<th>1. Contact SPA Research Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPA recommends you contact your assigned SPA Research Administrator at least four (4) weeks ahead of your sponsor deadline.</td>
</tr>
<tr>
<td><strong>SPA Research Administrators</strong></td>
</tr>
<tr>
<td>Gretchen Argraves</td>
</tr>
<tr>
<td>Karin Bourassa</td>
</tr>
<tr>
<td>Julie Macy</td>
</tr>
<tr>
<td>Joshua Tyack</td>
</tr>
</tbody>
</table>

### 2. SPA Research Administrator Services

- Interpret the sponsor guidelines
- Provide information for some of the application pages
- Prepare the SPA Budget Worksheet (excel document)
- Upload the sponsor guidelines to InfoEd (if there are any)
- Convert final version of SPA Budget Worksheet to pdf format and upload to InfoEd
- Preliminary review and approval of proposal at the start of the route
- Final review and approval of final version of proposal at end of the route
- Obtain UVM institutional approval signature

### 3. SPA InfoEd Support Team Services

- How to upload your proposal document to InfoEd
- How to complete the on-line Routing Form
- How to electronically route the proposal
- Provide help and training for InfoEd Proposal Development and Proposal Tracking systems

### 4. SPA Web Site

- Submit Proposal steps can be located on SPA web site

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![SPA Web Site Image](image-url)
Assemble your Proposal Information

Before creating a proposal record in InfoEd, you should have ready some key pieces of information about your project.
This information does not need to be final.
After creating the proposal, you may continue to make changes until you are ready to submit.

To start your proposal in InfoEd, you must provide the following details:

- Principal Investigator
- USDA NIFA Funding Opportunity (Grants.gov Opportunity Number)
- Proposal Department
- Proposal Center/Program (if applicable)
- Proposal Type: New Proposal or Competitive Renewal
- Sponsor Name
- Project Title
- Project Start and End Dates
- Submission Deadline
- F&A Rate Type (Research on Campus, for instance)

Additional information specific to your USDA - National Institute of Food and Agriculture funding opportunity

- Will your proposal involve the use of human subjects?
- Will your proposal involve the use of laboratory animals?

If you have preliminary answers to all of the above, you are ready to begin.
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Login to InfoEd

https://spogi.uvm.edu/
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Create New Proposal

1. Login to InfoEd using the link on the UVM SPA Home Page - https://spogi.uvm.edu
2. Click the "Proposals" button at top left corner (see below).
3. Click the "Create New Proposal" button (see below).

If you do not have a "Proposal" button or a "Create New Proposal" button, please contact SPA for assistance.
Start a New Proposal

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New Proposal Questionnaire

The New Proposal Questionnaire takes you step-by-step through the essential details of your proposal.

Answer each question with the most current information you have, then click “continue” to go on to the next question.

Remember, you may still correct or change this information after you create the proposal.

Principal Investigator

The PI name will default to the name of whoever has logged in to InfoEd to create the proposal. If you are a PI starting your own proposal, your name should appear correctly at the top of the page (see below). If you are a Department Administrator creating a proposal on the PI’s behalf, you will need to change the name as follows:

1. Click the “Change” hyperlink.
2. Begin typing the PI's name until the name appears in the drop-down list.
3. Select the name and click “Continue.”
4. If the PI name does not appear in the drop-down list, please contact SPA for assistance.
5. Click continue
Select from Grants.Gov Opportunities
1. Pick "Select from Grants.gov Opportunities" in pick list
2. Click Continue.

Enter your USDA Funding Opportunity Number and Click Search (S2S button must be checked)
1. Enter your USDA NIFA Funding Opportunity Number and Click Search
2. This will open a live web services link to Grants.gov web site where you will be able to identify and select your funding opportunity.
3. The Search will bring up all opportunities that fit your criteria
4. Identify the right funding opportunity and then click the "Select" hyperlink to select your Opportunity Number

Select Proposal Type
1. Most proposals will be either a New Proposal - Master Record or a Competitive Renewal - Master Record.
2. Select the appropriate type and click “Continue.”
3. Note: If you are working with a Continuation or a Supplement on an existing award, please contact your SPA Research Administrator.
4. Click Continue
Select Sponsor

1. Start typing in National Institute of Food and Agriculture/Department of Agriculture.
2. The sponsor name will appear allowing you to select it.
3. Click Continue.
**Enter Project Title**
1. Enter proposal title with the major words capitalized. Please be sure there are no punctuation marks or extra spaces at the end.
2. Click continue.

**Enter Project Start and End Dates**
1. Enter the anticipated start and end date for your proposal and click “Continue.”
2. Be sure that your proposed start and end dates fall within the sponsor’s guidelines.
3. Click continue.
Confirm the Number of Budget Periods You Would Like

1. Confirm the number of budget periods is correct
2. Click continue

Is all the above Information Correct?

1. Review the information you provided in Questions 1 through 7
2. Use Back button at top right corner to step back though responses for any needed corrections.
3. Confirm the information you have entered or use the "Step back through responses" button to make corrections. Click Create Proposal button.

InfoEd Proposal Number Assigned

1. InfoEd will assign a new proposal number.
2. Write down the proposal number so you can easily find it later on.
The InfoEd "Setup Questions Tab" will prompt you for responses to the questions

Submission Mechanism / Form Information
1. Proposal Sponsor: Leave sponsor name set to National Institute of Food and Agriculture/Department of Agriculture
2. Submission Mechanism/Screen Template: Leave it set as 424 R&R (electronic submission)

Grants.gov Submission Information
1. Do not change the information in this section

2. Scroll down to Form section - The forms will auto populate based on the subsequent questions. Do not change the selections.
Deadline Information
1. InfoEd will guess at the right date, and is often wrong.
2. Enter the correct USDA NIFA deadline for submission.

General Proposal Properties
1. Answer Yes or No to these questions.

Associate Department
The Associated Department will automatically default to the Principal Investigator’s Home Department.

If the proposal should be set up in a department other than the Principal Investigator’s home department, click the Add button to add the correct department.

Then save the page, using the save button at top left corner.
Then click the radio dial to change the Associated Department to the new Department. Save the page again, using save button at top left corner.
Finally, use the “remove” button next to the incorrect department to remove it. There should only be one department listed here.

Associate Centers/Programs
The Associated Centers/Programs will automatically default to “None Identified”.
For most proposals, you need not do anything else with this field. Leave it as “None identified.”
However, if you intend to use the PeopleSoft “Program” Chartfield, click the Add button and locate the Center/Program from the list.
Then save the page, using the save button at top left corner.
If you cannot find the appropriate Center/Program, please contact SPA for assistance.

Budget Setup Information
Program Type - UVM F&A Rate
Select Program Type - Select from drop box the appropriate F&A Rate to be used.
If you don’t know which F&A Rate Type to pick, contact SPA for assistance
Indicate whether the majority of the work will be done On Campus or Off Campus.
This should match the F&A Rate you selected above.
Save and Continue
Your proposal record is now set up and you can begin completing the rest of the tabs.
Click Save and Continue. The proposal Setup Questions are now complete.
This is the USDA NIFA Cover Page.

Most of the information is automatically populated from the Principal Investigator’s InfoEd Profile and from the InfoEd Institutional Data. Populate the remaining fields and when done, click the "Completed" box at top right corner of Tab.

<table>
<thead>
<tr>
<th>SF424 (R&amp;R) Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>This is the USDA NIFA Cover Page.</strong></td>
</tr>
<tr>
<td><strong>Most of the information is automatically populated from the Principal Investigator's InfoEd Profile and from the InfoEd Institutional Data. Populate the remaining fields and when done, click the &quot;Completed&quot; box at top right corner of Tab.</strong></td>
</tr>
</tbody>
</table>

**Use dropbox to select COLLEGE which will appear in all Capital Letters on drop box list**

**Select SPA RA name from pick list**

**Leave this data as is - do not change this information**

**In this application being submitted to other agencies?**

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**What other Agencies**

<table>
<thead>
<tr>
<th>11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstration of USDA NIFA Proposal in InfoEd</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>12. PROPOSED PROJECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date: 01-Oct-2016</td>
</tr>
<tr>
<td>Ending Date: 30-Sep-2020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13. CONGRESSIONAL DISTRICTS:</th>
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<tr>
<td>a. Applicant: VT-01</td>
</tr>
</tbody>
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When the data is completed, click the "Completed" checkbox at top right corner of Tab.

Pl information pulls from infoEd profile. Click on Person’s name and it will open a box that will allows you to edit the data here.

Do not edit any of this data. Once the budget is entered on the Budget Tab, Box 15 will be populated.
List Performance Sites here

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Site Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The University of Vermont and State Agriculture</td>
<td>85 South Prospect Street 340 Waterman Building</td>
</tr>
</tbody>
</table>

This Tab will automatically populate with UVM information. If you have subcontracts, the Subcontract data will automatically pull in once the SPA Research Administrator enters the Subcontract budget data on the Budget Tab. If you have additional Performance Sites, add them here.

When the data is completed, click the "Completed" checkbox at top right corner of Tab.
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Internal Documents Tab

There are typically 2 or 3 documents uploaded at the bottom on this Tab.

1. SPA Routing Form (required)
   The Principal Investigator or the Department Administrator will open and complete the SPA Routing Form, which is now an electronic form embedded within InfoEd on the Internal Documents Tab.

2. SPA Budget Worksheet (required)
   The SPA Research Administrator work closely with Principal Investigator and Department Administrator to develop the proposal budget using the below excel SPA Budget Worksheet. Once the budget is completed, SPA will upload a pdf version of the spreadsheet to InfoEd.

3. Grants.gov Instructions - Gets pulled in automatically when you create the proposal

Once all required documents are uploaded, click the "Complete" box at the top right corner to the tab.
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Budget Tab

Your SPA Research Administrator will enter the budget details on this tab. The Principal Investigator will upload the Budget Justification on this Tab. When the data is completed, click the "Complete Budget" button at top right corner of Tab. Then click "Done" to close the window.

1) This page opens in a separate window.
2) Your SPA Research Administrator will populate the Budget Tab for you after you've reach agreement on the final SPA Budget Worksheet (excel worksheet).
3) You will then upload the Budget Justification in the tab called "Justifications" on the left navigation bar.
4) When the Budget figures are entered and the Budget Justification is uploaded, click the "Complete Budget" button at top right side of page. Then close this window.
After the SPA Research Administrator has entered the budget data on the Budget Tab, the Personnel tab will show a list of personnel. Please do not add personnel to this tab yourself. Instead, ask your SPA Research Administrator to add people, as necessary. Once the personnel appear on this tab, please upload the CV/Biosketch for all Key Personnel. Add the Current/Pending Support form for all required personnel. Refer to guidelines for specific requirements. When the data is completed, click the "Completed" checkbox at top right corner of Tab.

![Personnel Tab Image](image-url)
This tab contains each of the sponsor-specific forms you will need for your proposal submission. Click the "Edit" button to open and complete each of the forms. When you are done, click the Save button at top left corner of Tab. Then click the "Completed" button. Finally, click the "Done" button to close the window.
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Finalize Tab - Submit for Internal Review

All Tabs must be "Completed" to Build PDF /Form Pages and to Assemble Application

1. Build PDF / Form Pages - this will take a few moments to complete

2. Assemble Application / Build Grants.gov Application - This will create a single pdf representation of the proposal called "Assembled Doc"

3. Click the "Submit Final Review" Thumbs Up to start the route
PI reads PI Certification - clicks "Accepted" - enters UVM Net ID at prompt - clicks Continue button
If a PI Delegate starts the route, the PI is obligated to send the PI Certification to SPA via email.
The PI Certification must be received in SPA before the proposal may be submitted to the sponsor.
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Submit to Internal Route

After a few moments, a list of the required approvers will appear.

PI clicks Submit button to start internal route.

Once the route is successfully started, the PI will see a new window open on Finalize Tab that shows "Active Routing Progress. The PI can check here to see progress of internal approvals.

Submit to Route - Click Submit button to start route

Once route is started, this new box opens so that the Principal Investigator can monitor the routing progress.
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Lock Down - When Proposal is In Route, it is in “Lock Down” mode

While the proposal in in route for approvals, it is in lock down mode and the Principal Investigator will no longer be able to edit the proposal in InfoEd.

We expect that the Principal Investigator will continue to tweak the proposal documents outside of the InfoEd system.

Electronic Routing System - Review Dashboard - This is how Deans and Chairs Approve Proposal

Chairs and Deans receive notification to review and approve your proposal in three different ways

1) UVM Email system
2) InfoEd My Messages (a back up method if the email is accidentally deleted)
3) InfoEd Action Items (another back up method if the email is accidentally deleted)
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Routing System Email to Deans, Chairs, SPA and Other Approvers

From: System Administration, UVM InfoEd [mailto:catherine.ruley@uvm.edu]
Sent: Friday, August 12, 2016 2:57 PM
To: Cathy Ruley Condon <Catherine.Ruley@uvm.edu>
Subject: PROP APPRVL needed for Catherine Ruley Condon -31583

Principal Investigator Catherine Ruley Condon
Proposal 31583
Project Title "Demonstration Proposal"
American Lung Association
Sponsor Deadline 30-Aug-2016

Dear Reviewer/Approver:

Catherine Ruley Condon needs your approval to submit the proposal referenced above.
This email is coming to you via the UVM InfoEd Electronic Proposal Routing System.
You will receive this email in your InfoEd My Messages inbox as well.

1) Click Reviewer Dashboard link to access Review Dashboard
2) Login with your UVM Net ID (your COM IS login will not work for InfoEd)
3) The Review Dashboard will appear in separate window
4) Click HELP Tab for instructions (if needed - optional/informational)
5) Click REVIEW Tab to review and approve proposal documents. After you have reviewed all documents, click the DONE box next to each item. Then click the SAVE icon located at top right corner. You will not be able to approve the proposal unless you save the DONE changes.
6) Add Comments: Add comments if you wish. Click the SAVE icon at top right corner when you are finished adding comments.
7) See Comments: View other reviewer comments at top right corner of screen. Click the SAVE icon at top right corner.
8) My Decision is: Select "Approve Proposal Submission" or "Return to PI for Changes." For approvals, you will must click the Accept button for the Approver Certification. Then click SAVE icon at top right corner. You will be prompted for your Username and Password (UVM Net ID). Then click ACCEPT to finish.
9) Click ROUTE Tab to see route path and to confirm your decision has been recorded. You are now done and you may "X" out of the Review Dashboard.

Sponsored Project Administration
217 Waterman Building
802-656-3360

[text updated 12-13-12]
Review Tab

1. Comments are optional.
2. If you wish to add comments, please type our comments in one of the four boxes.
3. Then click “Save” icon at top right corner page

<table>
<thead>
<tr>
<th>Document</th>
<th>Submitted</th>
<th>Replace</th>
<th>Review Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft Proposal</td>
<td>12-Aug-2016 2:39:03 PM</td>
<td>Replace</td>
<td>Un-Reviewed</td>
</tr>
<tr>
<td>Routing Packet Period 1</td>
<td>12-Aug-2016 2:38:32 PM</td>
<td>Replace</td>
<td>Un-Reviewed</td>
</tr>
<tr>
<td>Sponsor Guidelines</td>
<td>12-Aug-2016 2:30:50 PM</td>
<td>Replace</td>
<td>Un-Reviewed</td>
</tr>
</tbody>
</table>

These are the documents for review by Chairs, Deans, SPA and other approvers

IMPORTANT:
Comments do not “go” anywhere. They are meant as “notes to the file” and to inform reviewers who come after you in the route path. If you have important comments for the Principal Investigator, for SPA or for other reviewers who have already reviewed the proposal, you are advised to email or call with your comments.
Final Steps - After the Route is Completed

While the proposal is in route for approvals, it is in lock down mode

The Principal Investigator will not be able to edit the proposal

We expect that the Principal Investigator will continue to tweak the proposal documents

Once the route is approved, the SPA RA will update the proposal status and the Principal Investigator will be able to replace any draft documents with the final documents

The SPA RA will NOT submit the proposal to USDA NIFA until the Principal Investigator confirms that all uploaded documents and data is in final form.

SPA Research Administrator Final Review & Submission to Grants.gov

Once the PI notifies the SPA RA that the proposal is done and final, the SPA RA performs a detailed review of the final version of the proposal

The SPA RA notifies the PI of any final edits or corrections that need to be made

The SPA RA ensures that all COI disclosures are up to date

Then the SPA RA clicks the “Submit to Grants.Gov” button

Note: Only SPA RA role has authorization to click this button. If anyone outside of SPA tries to submit to Grants.gov, an error message will appear.

Grants.gov Validation Emails

Grants.gov receives the proposal, assigns it a Grants.gov Tracking number, and sends a series of four emails to SPA

1. GRANT12021024 Your application has been received by Grants.gov, and is currently being validated.
2. GRANT12021024 Your application has been received and validated by Grants.gov and is being prepared for Grantor agency retrieval.
3. GRANT12021024 Your application has been retrieved by the Grantor agency.
4. GRANT12021024 Grantor agency has assigned the following Agency Tracking Number to your application: 3872345.

These emails are NOT sent to the PI - Just to SPA

These emails will let us know if there is a failure at Grants.gov

The final email will indicate that the proposal was retrieved by the USDA NIFA

The SPA Research Administrator will forward you the final email so that you have confirmation the proposal was retrieved by USDA.