Proposal – How to Start a Renewal Funding Proposal

Renewal funding proposals are created from an existing funding proposal in Awarded state. A renewal funding proposal may be started by the PI or someone with edit access to the proposal.

1. Click Create Renewal to open the General Proposal Information page of the SmartForm. **Note:** The option to Create Renewal will only appear for the PI and anyone given access to this proposal by the PI. Instructions for the PI to manage access to the record may be found on Page 2 of these instructions.

2. A Funding Proposal SmartForm opens and Field 1 shows Renewal. To generate a Funding Proposal ID for the renewal, the required fields on the first page of renewal Funding Proposal SmartForm must be completed and saved.
How to Manage Access to Proposal Records

The Manage Access activity is used to manage the list of individuals who have either edit or read-only access to the proposal submission.

*Note: For records migrated from RMS, the PI may need to allow access to the Funding Proposal record.*

1. Click **Manage Guest List** in the left column of the Proposal Workspace.

2. In the pop-up window, enter the individual’s name or click […] to search for an individual to be added as an editor or a reader.
   
   *Note: This activity contains the same list of editors and/or readers as those listed as administrative personnel on the Personnel page of the Funding Proposal SmartForm.*

3. Click **OK** to return to Funding Proposal WorkSpace.