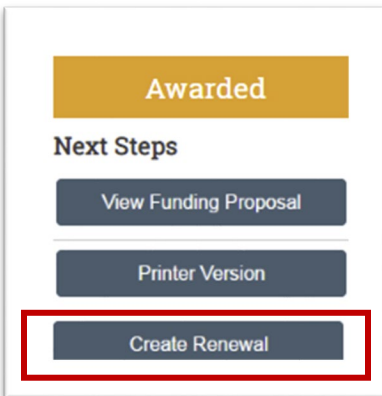


Proposal – How to Start a Renewal Funding Proposal

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.



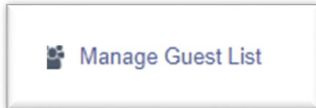
The image shows a screenshot of a "General Proposal Information" SmartForm. A red arrow points to the first field, "1. Type of application: ?". The dropdown menu is open, showing "Renewal" selected. Below this, there is a sub-field "a. If this is a resubmission or renewal, enter the sponsor number:" with an empty text input box. The second field is "2. * Short title of proposal: ?" with a text input box containing "Working hard or hardly working?-Renewal".

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.

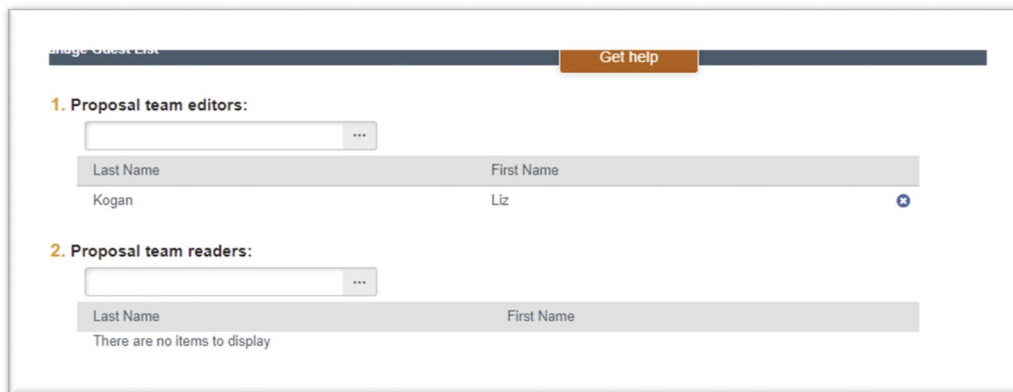
Note: For records migrated from RMS, the PI may need to allow access to the Funding Proposal record.

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.

A screenshot of a web application window titled "Manage Guest List". At the top right is a "Get help" button. Below the title bar, there are two sections: "1. Proposal team editors:" and "2. Proposal team readers:". Each section has a search input field with a dropdown arrow. Under "1. Proposal team editors:", there is a table with two columns: "Last Name" and "First Name". The first row contains "Kogan" and "Liz". A blue plus icon is at the end of the row. Under "2. Proposal team readers:", there is a table with two columns: "Last Name" and "First Name". Below the table, it says "There are no items to display".

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