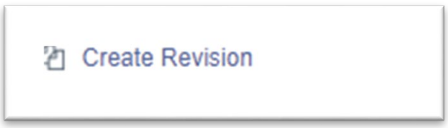
Proposal – How to Start a Supplemental (Revision) Funding Proposal

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

1. Click **Create Revision** in the left column of the Funding Proposal workspace.

   Note: The option to *Create Revision* 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 this document.



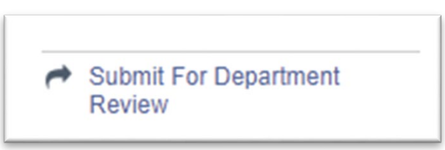
2. In the pop-up window, enter the **Resubmission name** and click **OK**.

3. A Funding Proposal SmartForm opens and Field 1 shows *Revision.* Update the SmartForm and use the **Continue** button to navigate through the SmartForm. On the last page click the **Finish** button.

4. The Proposal Workspace will be in **Draft** state and the proposal type is **Revision**.

5. Complete the Budget and all other necessary activities and sections.

6. When the submission is complete, click **Submit for Department Review**.

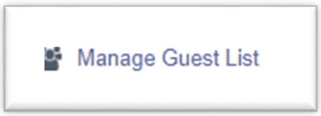


How to Manage Access to Proposal Records

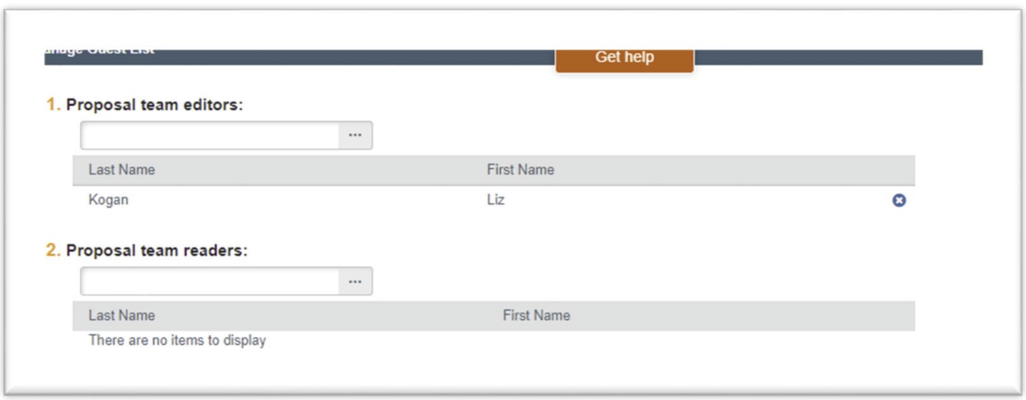
The Manage Access activity is used to manage the list of individuals who have either edit or read-only access to the proposal submission.

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.