



# UT RESEARCH MANAGEMENT SUITE

## Grants Module Frequently Asked Questions

### Proposals

#### 1. Will previously submitted proposals be available in *UTRMS-Grants*?

All pending proposals submitted to sponsors by OSP in the 12 months prior to June 23, 2022 have been migrated to *UTRMS-Grants* from the legacy RMS. These proposal records will be in a state of *Pending Sponsor Review* at go-live. Migrated proposals can be identified by their record numbers, which will be their RMS numbers followed by “FP,” e.g. 202200079001FP.

New proposals that are created in *UTRMS-Grants* will begin with FP, e.g. FP00000001.

#### 2. My migrated proposal was awarded, but is showing up with a budget of \$0. Where can I see the budget information?

As part of the migration process, all migrated awards include a “shell” Funding Proposal record that contains a minimum amount of information brought over from the legacy RMS. For those specific records, the awarded budget is listed in the Award record, not in the Funding Proposal record.

You can navigate to the Award record from the Funding Proposal workspace to view the approved budget. From a proposal (FP) workspace, click the award (AWD) name under Funding Awards to move to the award record.

The easiest way to tell if you are on a proposal or award workspace is through the record number in the top right corner. If it contains “FP,” you are on the proposal record. If it contains “AWD,” you are on the award.

#### 3. What if an older proposal that wasn't migrated gets awarded?

Contact the Office of Sponsored Projects (OSP) to help set up a new proposal record in *UTRMS* as part of the award set up.

#### 4. How can I create a new proposal?

Proposal entry in *UTRMS-Grants* includes:

- Creating a funding proposal record and entering all required information: title, sponsor, personnel, dates, etc.
- Entering a detailed budget, including subawards if applicable
- Creating and updating the SF424, for federal proposals that will be submitted system-to-system (S2S) from *UTRMS* to Grants.gov

To start a new proposal, navigate to [UTRMS-Grants](#) (the Grants module tab in *UTRMS*) and click **Create Funding Proposal** in the left-hand menu.

Detailed instructions are available for each step of the proposal entry process on the [Resources and FAQs page](#), including:

- *How to Create a Proposal*
- *How to Create a Proposal Budget*
- *How to Create a Subaward Budget*
- *How to Create and Update SF424 Forms*
- *Huron's SF424 User Guide*

#### 5. Is there a way to copy a proposal? I often have to complete the same information over and over again for similar funding opportunities.

Yes, you can copy an existing proposal. Navigate to the proposal workspace you wish to copy, click the **Copy** button in the left-hand menu, enter a new name (short title), and click **OK**. A new proposal (with a new FP number) will be created.

The History tab of the original proposal will have a direct link to the new copied proposal and vice versa.

**6. What should I use as the “short title” of my proposal?**

The “short title” will be used as the proposal’s name in *UTRMS-Grants*. (The “long title” is full project title.) For short title, please use the naming convention **PI Last Name\_Sponsor\_Department\_Sponsor Deadline**. For example: Johnson\_NIH\_NaturalSciences\_10/15/2024.

**7. How do I find direct and prime sponsors in UTRMS-Grants?**

There are multiple ways to search for sponsors in UTRMS-Grants. You can just start typing the name of the sponsor in the appropriate field and select from the drop-down list. You can click on the ellipsis to the right of the field to open the advanced search options. The percent (%) sign can be used as a wildcard when searching for a sponsor's name using the advanced search options.

**8. What if the sponsor is not found in the search results?**

If the direct sponsor is not found in the search results, enter "TBD Sponsor" as the direct sponsor in question 5 as a placeholder and enter the name of the direct sponsor in question 5a.

**9. Will the Co-PI on a proposal automatically have access to the proposal?**

The Co-PI and any other team members listed under Proposal personnel will need to be added to the proposal team under “Administrative personnel” as a reader to see the proposal or as an editor to have the option to make changes to the proposal.

**10. Where should I attach proposal documents when my proposal is not being submitted system-to-system?**

Click on the "Add Attachments" activity in the funding proposal workspace

**11. How can I check my proposal for errors?**

When you are in the proposal SmartForm, click the Validate button in the top left corner. Any errors will be listed. Click on an error to be brought directly to that question in the SmartForm.

**12. How do I submit a proposal for OSP review?**

When your proposal and budget have been entered and the record is ready for OSP review, navigate to the proposal workspace and click the **Submit for Department Review** button in the left-hand menu. During the Department Review step, OSP will assign a Proposal Analyst (called a “Specialist” in *UTRMS-Grants*) and begin their review.

Note that after clicking the **Submit for Department Review** button, the proposal will no longer be editable by the proposal team. OSP can send the proposal back to the proposal team for editing through the “Request Clarification” activities.

**13. In what states is a funding proposal editable by the PI and Department staff with edit rights?**

Draft, Department Review: Response Pending from PI, Specialist Review: Pending Changes by PI, JIT Response Required.

**14. Can I edit my proposal/budget after I submit it for Department Review?**

If you need to request edit access after submission, please use the "Send Email" activity to notify the assigned specialist.

**15. What if OSP needs me to make changes to a proposal?**

If OSP requests changes, you will be notified by email. Navigate to the proposal by clicking the link in the email or in your *UTRMS* Inbox and click **Edit Proposal**. Pages with reviewer notes will be marked with a comment bubble icon. Make any changes necessary, reply to reviewer comments, and return to OSP by clicking the **Submit Changes to Specialist** button in the left-hand menu of the proposal workspace.

**16. Is it possible to download the proposal and associated attachments as a PDF document?**

The proposal SmartForm (electronic proposal form) can be saved or printed as a PDF document. For Grants.gov submissions, the SF424 has an activity to generate entire applications (attachments included) as a PDF document.

**17. How will I know that my proposal was submitted?**

When OSP has submitted your proposal, the *UTRMS-Grants* record will be moved into the *Pending Sponsor Review* state. The PI and Administrative Contact listed on the proposal will receive email notifications from the system with the subject line “Proposal Submitted.”