How to Create & Update SF424 Forms

If you answer Yes to the question “*Will this application be submitted system-to-system?*” on the Submission Information page of a Funding Proposal and supplied funding announcement information (See How to Create a Proposal), UTRMS will create the applicable SF424 forms and populate them with data from the proposal and budget SmartForms. Department study staff can create and update these forms when proposals are in Draft or Response Pending states in UTRMS.

**Important:** Data populated from Funding Proposal typically includes the personnel contact information, personnel biosketch and current/pending, budget and subaward budget detail.

Create SF424 forms

1. Navigate to the proposal workspace by accessing the proposal from My Inbox or searching for the proposal on the Grants page. Click the proposal name to display the proposal workspace.
2. From the funding proposal workspace, click **Create-Update SF424**

3. In the resulting dialog, select the SF424 forms you want to populate with data from the funding proposal, and then click **OK**.

**Reminder!** Make sure that all necessary forms are checked. The system will not warn you if a form required by the sponsor is not checked. NIH packages allow the user to pick between the optional modular budget or the R&R Budget and R&R subaward budget (if applicable). Please be sure to select either budget format for an NIH submission.
4. A Success alert appears when the SF424 forms have been generated. After a few seconds, the dialog window will close automatically.

Complete SF424 forms and add required data
1. Once an SF424 form is generated, you can find a link to it in two places on the proposal workspace: 1) in the top Proposal Information section, and 2) in the SF424 Summary tab.
2. Click either link to the navigate to the proposal’s SF424 workspace. You are now editing/navigating in the SF424 Forms only for S2S Submission. In the SF424 workspace, click **Edit Grant Application**.

3. On the first page of the SF424, you are able to add any additional optional forms not checked when creating the SF424. Please be sure the optional forms conform to submission guidance.

4. Click **Continue**.

5. **Review/modify data** and **Upload Attachments** in the SF424 forms, as needed in accordance with sponsor guidelines and solicitation instructions. This includes:
   - Confirmation that pre-filled data is accurate
   - Confirmation of complete institutional and personnel profiles
   - Upload of all sponsor required submission documents, conforming to sponsor specifications
   - Confirmation of correct budget details

   *Note* Changes to the application, such as re-budgeting, modifying personnel, changing SF Cover Sheet data, etc., should be done within the Funding Proposal or Budgets. From there, please utilize the **Create-Update SF424** option to update the SF424 package.

   **Important**: Information entered directly into the SF424 package will be over-ridden any time the **Create-Update SF424** button is used and is therefore recommended to input directly into the system to avoid data loss.
6. On the last page, click the **Validate** button in the upper left to check for errors or warnings.

![UT Research Management Suite](image)

7. Click the linked field name on any error or warning to jump to that question on the SmartForm. **Errors** are marked with red circle symbols and must be resolved before submission.

![Error/Warning Messages](image)

**Warnings** are marked with yellow triangle symbols. Warnings will not stop submission but should be reviewed to ensure the information in the SF424 is correct.
8. After all errors are resolved, click **Finish**.

See [How to Submit Proposal to OSP](#) when the proposal is complete and ready for OSP review and submission to the sponsor.