PROPOSAL TRANSMITTAL FORM – (PTF) - ORIGINATOR

PURPOSE

The purpose of this document is to enter a Proposal Transmittal Form (Originator Role).

STEPS

1. Navigation: Grants > Proposal Form > Add a New Value

2. Click Add
3. Enter/Select the following items:
   a. Enter Proposal Title
   b. Select Purpose
   c. Enter Proposal Start Date
   d. Enter Proposal End Date
   e. Enter Sponsor
   f. Enter Prime Sponsor (If Applicable)
   g. Select Type
   h. Enter Sponsor Award # (If Applicable)
   i. Enter Solicitation # (If Applicable)
   j. Current Award # (If Applicable)
   k. Enter Due Date
   l. Check (If Applicable)
   m. Select Institution
   n. Select Department
   o. Select Subdivision (Subdivision must always match Department)
   p. Select PI/Co-PI
   q. Select PI Empolyee ID
   r. Repeat steps 18 and 19 for additional PI’s and Co-PI’s
   s. Select CFDA (If Applicable)
   t. Select Primary (If Multiple CFDA’s)
4. Enter/Select the following items:
   a. Enter Total Direct Costs – Budget Period - Year 1
   b. Enter F&A (Indirect) Costs – Budget Period - Year 1 (If Applicable)
   c. Enter Cost Sharing - Budget Period - Year 1 (If Applicable)
   d. Enter Total Direct Costs – Budget Period - All Years
   e. Enter F&A (Indirect) Costs – Budget Period - All Years (If Applicable)
   f. Enter Cost Sharing - Budget Period - All Years (If Applicable)
   g. Enter FT Exempt Rate
   h. Enter FT Non-Ex Rate
   i. Enter PT All Rate
   j. Select F&A Base
   k. Enter F&A Rate
   l. Click
   m. Click
5. Select the following items (If Applicable)
   
a. Human Subjects

b. Select Hazardous Materials (If Applicable)

c. Select all applicable materials from Hazardous Materials Sub-Menu

d. Select ‘Select’ Agents (If Applicable)

e. Select Recombinant DNA (If Applicable)

f. List all applicable materials from Recombinant DNA and/or Biological Agents submenu
g. Select Biological Agents (If Applicable)

h. Select Animals (If Applicable)

i. Select Radioactive Materials (If Applicable)

j. Select Toxic Substance Control Act (If Applicable)

k. Select Export Controls (If Applicable)

l. Select New or Modified Space (If Applicable)

m. Provide summary detail of space requirements in New or Modified Space sub-menu

n. Select Information Technology (If Applicable)

o. Select Faculty Buy-out (If Applicable)

p. Provide details of Faculty Buy-out in Faculty Buy-out sub-menu

q. Select Sub-recipient Organizations (If Applicable)

r. Provide details of Sub-recipient Organizations in Sub-recipient Organizations sub-menu

i. If Sub-recipient Organization is not available from Vendor ID drop down list, manually enter Sub-recipient name in field labeled ‘Other’s if not listed Vendor ID’.

s. Select Required Cost-Sharing (If Applicable)

t. Provide details of Cost-Sharing in Cost-Sharing sub-menu
u. Select Requested/Required F&A Waiver (If Applicable)

v. Provide justification for Requested/Required F&A Waiver in Requested/Required F&A Waiver sub-menu

4. Click to attach the proposal documentation to the PTF for review. The proposal documentation may include:

   a. Sponsor Guidelines
   b. Budget
   c. Budget Justification
   d. Abstract
   e. Narrative and/or any other required information

5. Click
5. Select Approver(s)
   a. Click Submit for Approval - This will create the workflow path and return you to page 1.

6. Click Print PDF - To print a .pdf version of the PTF.
   a. Click Save