PROPOSAL TRANSMITTAL FORM – PTF REVIEW AND APPROVE

PURPOSE

The purpose of this document is to provide detailed instructions on how to review and approve the electronic Proposal Transmittal Form.

STEPS

1. Upon receipt of email notification please access the PTF via one of the following methods:
   a. If already logged into PeopleSoft – Click on the blue hyperlink in the email notification.
   b. If not logged into PeopleSoft – Log in and proceed with step 2.

2. Navigation: **Grants > Proposal Form > Find an Existing Value**

![Proposal Form](image)

3. Type in or Click
   a. Business Unit = “GRANT”
   b. Enter Proposal ID

![Search Button](image)
4. Review data on page number 1 (Proposal Form and PI Details). Here are some helpful hints to assist with data review:

   a. Ensure that the Sponsor is the agency/organization from which funds are being requested. This can be confirmed by reviewing the proposal documents which can be found on page number 6 (Add attachments).

   b. If Boston College is a subcontractor on a proposal being submitted by another organization, the Sponsor is the organization from which we will directly receive the funding. The Prime Sponsor is the agency/organization that is the original source of funding. For example, Professor Pitt at Hollywood University is applying for research funding at the National Institutes of Health with Professor Anniston at Boston College. For our records, the Sponsor is Hollywood University and the Prime Sponsor is the National Institutes of Health. This can be confirmed by reviewing the proposal documents which can be found on page number 6 (Add attachments).

   c. The Department and Subdivision numbers must always be the same.

   d. Please take note of Department ID number as this will be needed later on.
6. Review data on page number 4 (Enter Budget Details). Here are some helpful hints to assist with the data review:
   
a. Funding amounts for **Budget Period – Year 1** must be entered. If no funding amount is entered, refer to proposal documentation on page number 6 (Add Attachments). Note that there will be instances where F&A is equal to $0.

b. Funding amounts for **Budget Period – All Years** must be entered. If no funding amount is entered, refer to proposal documentation on page number 6 (Add Attachments). Note that there will be instances where F&A is equal to $0.

c. **Applied Rates – Percentage**: Each rate type must have a value (%) entered. If no values are entered, refer to proposal documentation on page number 6 (Add Attachments).
8. Scroll to bottom of page

9. If there are no issues with this PTF, select to approve the PTF.

10. If there is an issue with this PTF, please contact the **pre-award administrator** to assist with resolving the issue. In this case, **Matylda Bylinska** is the pre-award contact. Once issue is resolved, go to step 9 to approve the PTF.

11. Next step: proceed to the instructions entitled “2_Transfer PTF to Proposal Database”.