RAMP Grants Test Site URL

Proposal and Budget Submissions (Federal)

RAMP Test Site: https://mpclkfsustage4.huronclick.com/GrantsUAT

Log your feedback/issue found: http://tinyurl.com/ramp-grants

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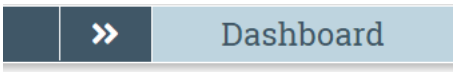
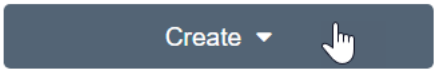
Exercise 1: Create Proposals

- ☐ Log in as the PI, Rebecca Simms, **Username:** mypi **Password:** myramp2020!
- ☐ From the Dashboard, click Create >> **Create Funding Proposal**





- ☐ **Complete the Funding Proposal SmartForm:**

General Proposal Information Page

- ☐ **Type of application**: leave as is
- ☐ **Proposal title**: name the Funding Proposal with the date, your own initials, and the word "Federal" (e.g., "0401 KK Federal")
- ⓘ *Short title: this is what appears throughout RAMP*
- ⓘ *Long title: this is the full title of the project & what appears on SF424 forms*
- ☐ **PI/Project Lead**: for testing purposes, leave as is (default to the logged-on user, Rebecca Simms)
- ⓘ *Note: when using RAMP Grants after Go-Live, department admin who creates proposal on the PI's behalf can update this field to be the PI's name.*
- ☐ **Sponsor**: type "National Institutes of Health" as a sponsor.
- ⓘ *Once you specify the sponsor, RAMP automatically creates a budget for you that you can complete (we will cover this in exercise#2).*
- ☐ Complete the rest of the form and click continue.

Personnel Page

- ☐ **PI/Project Lead**: for testing purposes, leave as is.
- ☐ **Responsible department**: for testing purposes, leave as is (Chemical Engineering)
- ⓘ *This field is auto populated with the PI's department, Chemical Engineering.*
- ⓘ *Note: when using RAMP Grants after Go-Live, the name of the department can be changed, if necessary.*
- ☐ Complete the rest of the form and click continue.

Submission Information Page

- ☐ **Will this application be submitted system-to-system**: select yes.
- ☐ **Package ID, opportunity ID, CFDA**: type PA-EN-R01 as the opportunity ID and click Find.
- ⓘ *Grants.gov returns matching opportunities, their requirements, and forms (if supported by RAMP).*
- ☐ Select the opportunity option that appears below and click continue. Review the information on the next page, Funding Opportunity Announcement, and click continue.

Budget Periods and Key Dates Page

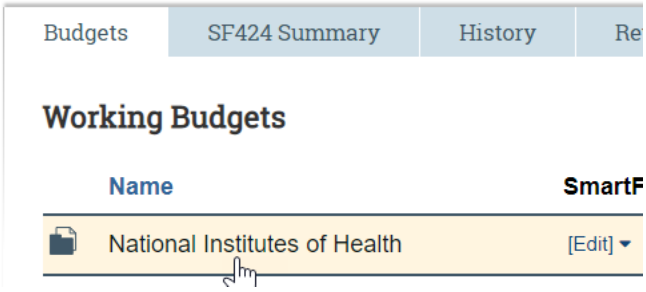
- ☐ **Application submission deadline:** select a date in the future.
- ⓘ *This calculates internal submission deadline (based on the 3 days rule)*
- ☐ **Budget periods:** for testing purposes, reduce the number of budget periods to only 2 budget periods. Click continue.

All other pages in the Funding Proposal SmartForm

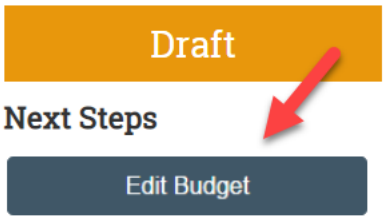
- ☐ Complete all required fields and any optional fields you choose on the SmartForm.
- ☐ Navigate to the Completion Instructions page and review the completion instructions carefully.
- ☐ Click Finish. You are now directed to the workspace of this funding proposal.

Exercise 2: Create Budgets

- ☐ While still logged in as the PI, on the funding proposal workspace, **navigate to the Budgets tab and click on the name of the sponsor budget**. You are now directed to the workspace of this sponsor budget.



- ☐ On the sponsor budget workspace, click Edit Budget.



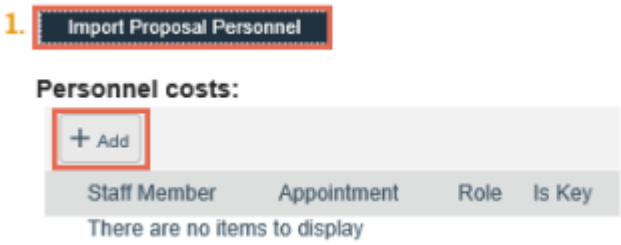
- ☐ **Complete the Sponsor Budget SmartForm:**

General Budget Information Page

- ☐ Enter general information about this budget. Click continue.

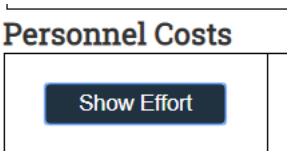
Personnel Cost Definition Page

- ☐ Click "Import Proposal Personnel". This will import personnel information you enter in the Funding Proposal SmartForm. Click continue.
- ⓘ *The "Add" button allows you to add more personnel to the budget form, as necessary.*



Personnel Costs Page

☐ Click "Show Effort."

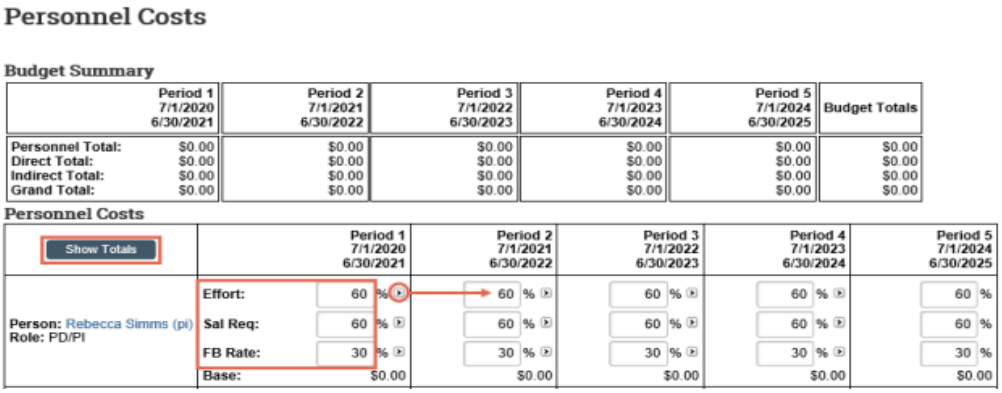


☐ Enter the planned percentages of effort and salary on the project.

☐ Modify the defaults for the Fringe Benefit rate and the base salary if appropriate.

ⓘ ***To edit the base salary for a person**, click their name at the left, and edit the Base salary applied field in the form that appears.*

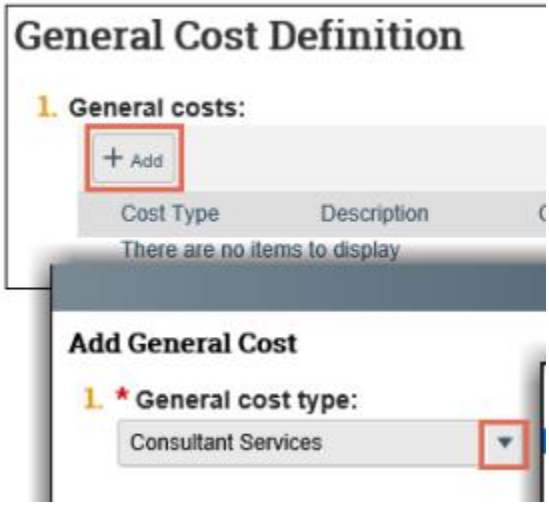
☐ Click the small arrows at the right of a budget period column to replicate values in successive periods.



☐ Click Show Totals to update the figures in the budget tables. When done, click continue.

On the General Cost Definition Page

☐ Add line items for general costs. When done, click continue.



☐ When satisfied with all your budget entries, click Finish. You are now directed to the workspace of this sponsor budget.

ⓘ *Note: If Subaward Budget or Cost Share Budget are needed, you can create those budgets from the workspace of the sponsor budget. We will not cover these scenarios in the session today, for instructions on how to complete this test script at a later time, see the appendix section.*

Exercise 3: Generate SF424

Create SF424 Forms:

☐ While still logged in as the PI, on the funding proposal workspace, click on the "Create-Update SF424" activity.

☐ On the activity form, select the SF424 forms you want to map data to from Grants, then click OK. A success alert appears when the SF424 has been generated. The activity form closes itself automatically.

Update SF424 Forms:

ⓘ For testing purposes, we will not complete all required fields for SF424 today. You can scroll through the SF424 pages to understand the fields that are auto populated and complete the following script to understand how the validate function works.

☐ Once an SF424 form has been generated, the SF424 link appears on the funding proposal workspace. You can click on the link that appears above the tabs area or click the SF424 Summary tab on the funding proposal workspace and click on the SF424 link to access the SF424 workspace.

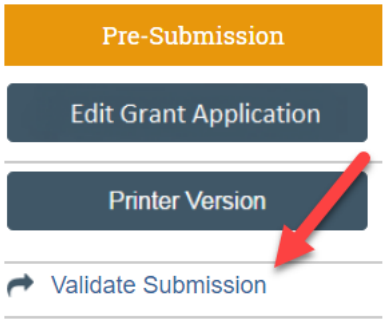
☐ On the SF424 workspace, click Edit Grant Application.

☐ On the first page of the SF424, select any optional forms to include in the SF424 application.

☐ Click Continue to review the SF424 forms. Use the left scrollable navigation panel to navigate to different pages of the SF424 forms.

☐ On the last page, click Finish to return to the SF424 workspace.

☐ On the SF424 workspace, click Validate Submission to list any errors you must correct plus any potentially problematic conditions.



☐ Click Close to exit out of the form. Click on the Parent Project link located above the tabs area of the SF424 workspace to navigate back to the funding proposal workspace.

Exercise 4: Submit for Department Review

To submit for Department Review:

☐ While still logged in as the PI, on the funding proposal workspace, click on the "Submit For Department Review" activity.

☐ Read the Endorsements statement carefully.

☐ Check the appropriate checkbox.

☐ Click OK.

☐ The funding proposal is now submitted to Department for review.

Appendix

Additional test scripts for Ancillary Review Assignments.

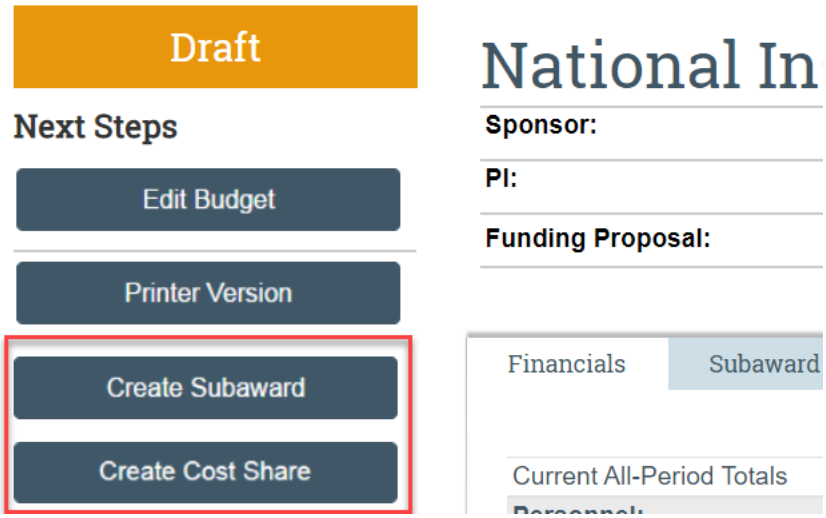
- ⓘ If additional reviews required by collaborating departments, you can route the funding proposal for their review using an ancillary reviews function.
- ⓘ Ancillary reviews can be assigned before or after the proposal is submitted to Department Review.
- ⓘ Ancillary reviews are carried out in parallel with standard review cycles.
- ⓘ As a user with edit rights on a project, you can assign ancillary reviewers, who can submit their reviews at any point in the funding proposal review workflow.

To assign ancillary reviewers:

- ☐ While still logged in as the PI, on the funding proposal workspace, click on the "Manage Ancillary Reviews" activity.
- ☐ On the Manage Ancillary review form, click Add.
- ☐ On the Add Ancillary Review form:
  1) Organization: Medicine Clinical Sciences (example where Medicine Clinical Sciences is a collaborating department)
  2) Select review type
  3) Select whether this ancillary review is required
  4) Click OK
- ☐ When finish adding reviewers, add comments or supporting documents as necessary, then click OK on the Manage Ancillary Reviewers form. You are now directed to the funding proposal workspace.

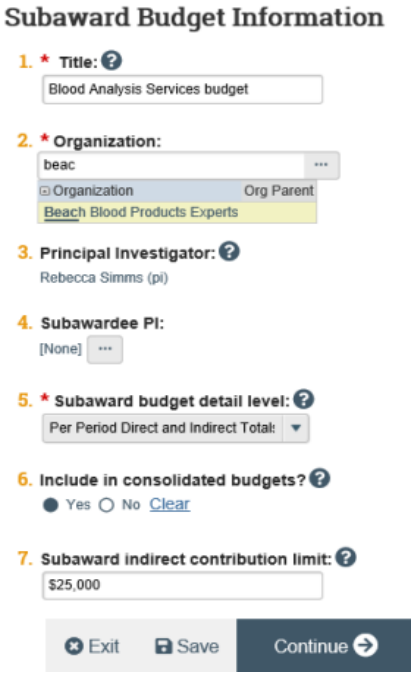
- ⓘ To check the progress of an ancillary review at any point, navigate to the Reviewers tab

Additional test scripts for Subaward budget and Cost Share budget.



Complete Subaward Budget SmartForm:

☐ From the sponsor budget workspace, click Create Subaward



☐ On the Subaward Budget Information page, type a descriptive budget title.

☐ Under Organization, start typing the subawardee organization's name and pick from the matches, or click the ellipsis to select from the full contractor list.

ⓘ If the subawardee's project has a PI, click the ellipsis, supply the PI information in the resulting form, and click OK.

☐ Under Subaward budget detail level, choose how to supply financial information. If you select Per Period Direct and Indirect Total a subsequent page for financial input becomes available.

☐ Supply any other optional information and, click Continue.

☐ To document other subawardee personnel, on the All Personnel page, click Add, complete the form, then click OK. When done adding personnel, click Continue.

☐ If you selected Per Period Direct and Indirect Totals for the Subaward budget detail level, on the Per Period Cost Totals page, enter direct and indirect amounts for the budget periods.

Per Period Cost Totals

Total Direct:	$400,000
Total Indirect:	$220,000
Total Project:	$620,000

Cost Totals	Period 1 Start: 7/1/2020 End: 6/30/2021	2 7/1/2021 6/30/2022	3 7/1/2022 6/30/2023	4 7/1/2023 6/30/2024	5 7/1/2024 6/30/2025	Total
Direct:	$80,000	$80,000	$80,000	$80,000	$80,000	$400,000
Indirect:	$44,000	$44,000	$44,000	$44,000	$44,000	$220,000
Grand Total:	$124,000	$124,000	$124,000	$124,000	$124,000	$620,000

1. Budget notes:

Exit Save Continue

- ☐ Click the small arrows at the right of a Period column to replicate values in all subsequent periods. When done, click Continue.
- ☐ On the Attachments page, click Add if you want to attach any supporting documents for internal review purposes, such as instructions.
- ☐ When satisfied with your budget, click Finish. You are now directed to the workspace of this sponsor budget.

Complete Cost Share Budget SmartForm:

- ⓘ If a funding proposal's primary budget specifies salaries exceeding the specified salary cap or salary requirement percentages less than the projected effort percentages, the budget workspace alerts you to create a cost sharing budget to show how the additional funds will be provided.
- ☐ From the sponsor budget workspace, click Create Cost Share
- ☐ On the Cost Share Information page, select the cost share type:
- ⓘ Mandatory: required by the sponsor.
- ⓘ Voluntary Committed: a voluntary but binding commitment.
- ⓘ Third Party In Kind: external party non-cash contribution.
- ☐ Under Cost share entity, start typing the cost sharing organization's name, then select it from the list of matches. (You can use "%" as a wild card.) Alternatively, click the browse button to browse for the organization.
- ☐ Click Continue or Save. Grants creates a cost sharing budget and lists it on the Budgets tab of the proposal workspace. (This is also where you will see any cost sharing budgets Grants creates automatically.)
- ☐ Fill out the other pages of the cost sharing budget as you would a primary budget.
- ☐ When satisfied with your budget, click Finish. You are now directed to the workspace of this sponsor budget.