University of Pittsburgh

PERIS PITT ELECTRONIC RESEARCH INFORMATION SOLUTION

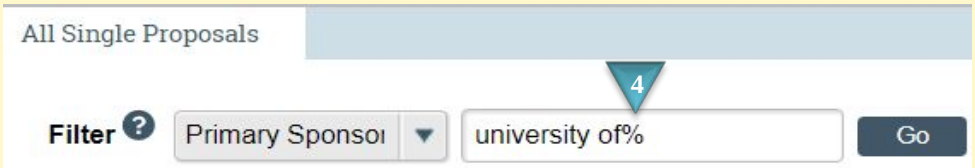
System Requirements and Useful Information

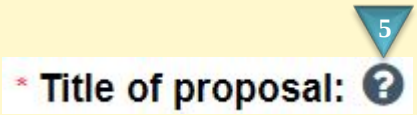
Platform	Browser
Microsoft Windows 7, 8, 8.1, 10	Internet Explorer: version 11 Edge: latest version Firefox: latest version Chrome*: latest version
Apple Mac OS X 10.9, 10.10, 10.11, 10.12	Safari: latest version applicable to OS Firefox: latest version Chrome: latest version
Apple iOS 9, 10 (iPhone and iPad)	Safari

When stated that a certain browser version is supported, you may find that a more recent versions provide a better experience and we may suggest upgrading your browser as a potential solution to some issues.

Support of browsers is dropped if they are excessively problematic.

It is expected that presentation and behavior may vary with different browsers, versions, and platforms.





Where to start?

1. Click supports Windows, OS, and iOS platforms.

What Browser can I use?

2. Click supports Internet Explorer, Edge, Firefox, Chrome, and Safari.
3. * If you install a theme in Chrome, vertical scrollbars may disappear in pop-up windows.

Useful information.

4. Use the % sign to add a wildcard to your search.
5. Refer to the help text in MyFunding to understand the question and the information that needs to be entered.
6. Early Account Requests will be addressed in Phase II.

Logging in to the PERIS™ portal

1

Platform	Browser
Microsoft Windows 7, 8, 8.1, 10	Internet Explorer: version 11 Edge: latest version Firefox: latest version Chrome*: latest version
Apple Mac OS X 10.9, 10.10, 10.11, 10.12	Safari: latest version applicable to OS Firefox: latest version Chrome: latest version
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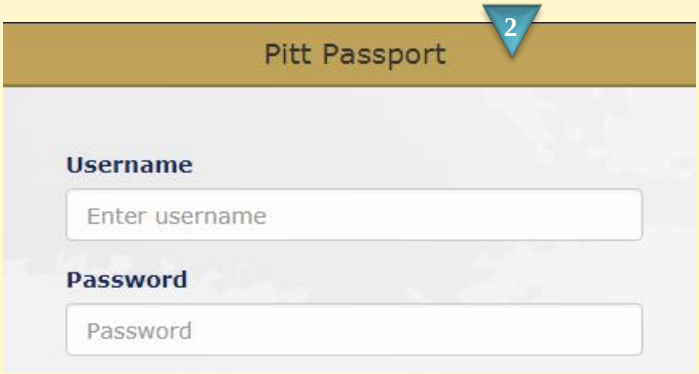
2



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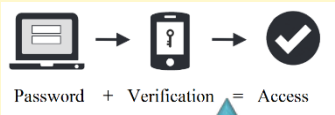


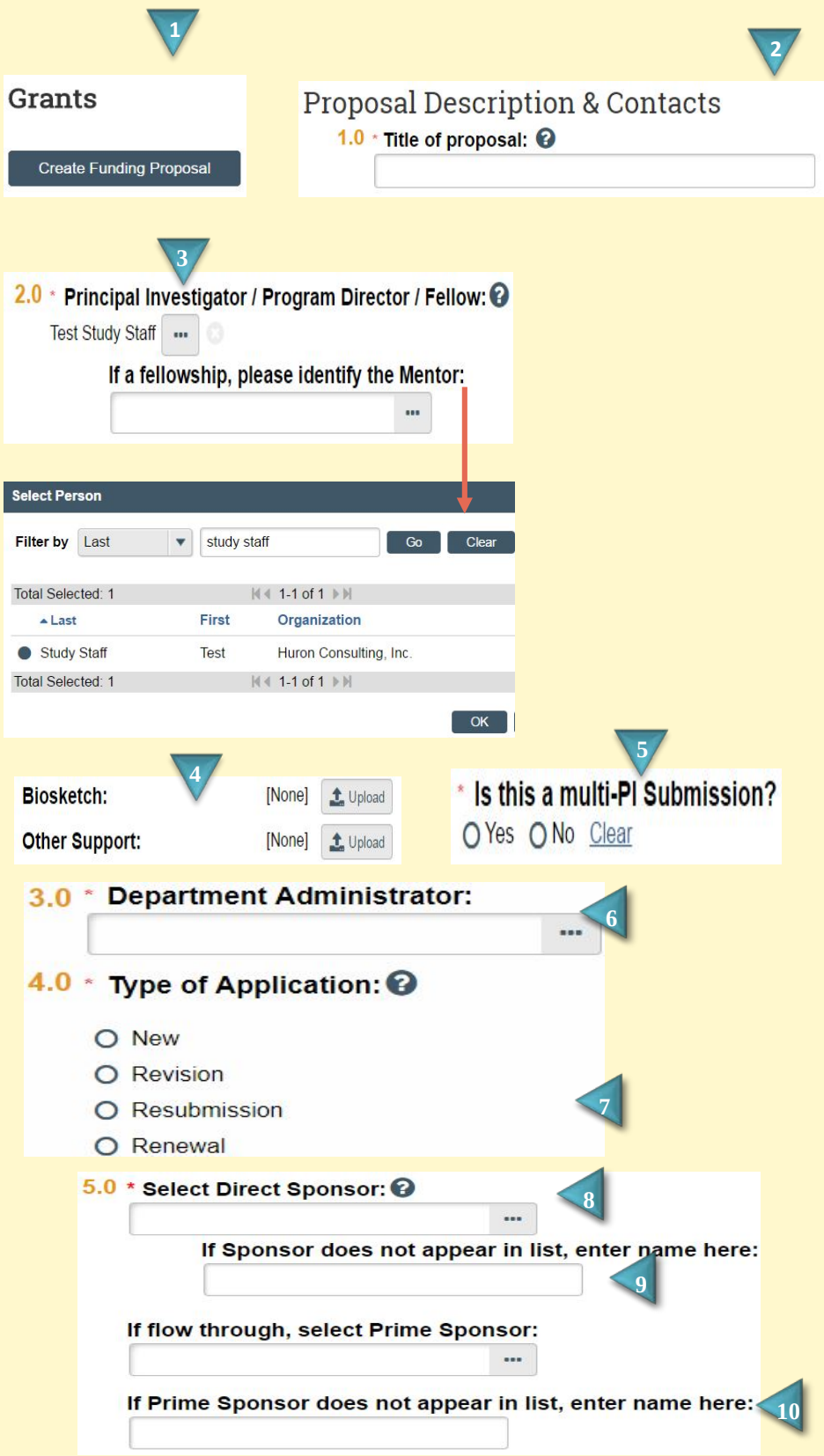
3

4

Where do I start?

1. Review Platform and Browser requirements.
2. To log in, visit my.pitt.edu. This will take you to the Pitt Passport authentication page. Enter your University Computing Account username and password, and click *Submit*. **You can also log in at https://peris.pitt.edu by clicking Login with Pitt Passport.**
3. University Multifactor Authentication will require that you verify your account.
4. If you logged in through my.pitt.edu select **Access the PERIS™ portal**.

Creating a Funding Proposal – Completing Proposal Description & Contacts

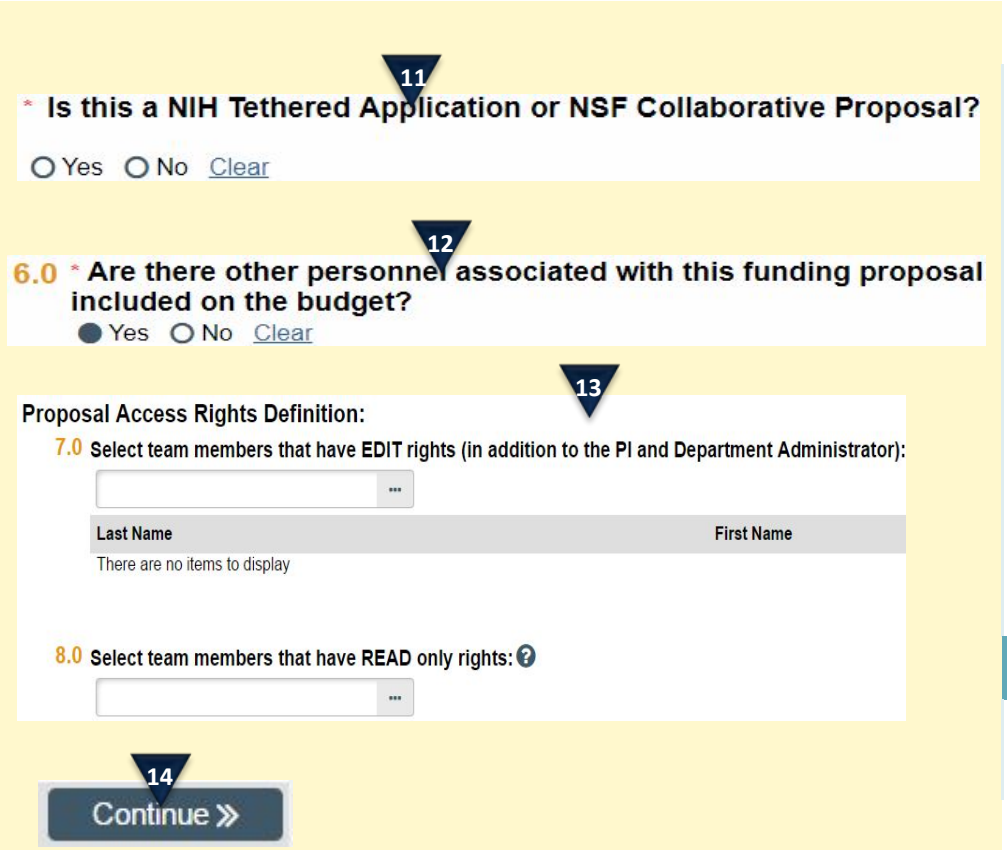


Where do I start?

1. After logging in click *Create Funding Proposal*.

How do I complete the Proposal Description & Contacts SmartForm?

2. Enter the Title of your proposal.
3. Select the Principal Investigator by clicking … Enter the name in the text box. Click *Go* and then *OK*.
4. Upload the Biosketch and Other Support documents.
5. Is this a multi-PI Submission? Answer *Yes* or *No*. If Yes all Principal Investigators will be required to complete a PI Certification.
6. Select the Department Administrator by searching the the progressive text box or click …
7. Select the Type of Application
8. Select the Direct Sponsor by typing in the progressive text box or click …
9. If the Sponsor is not found enter it in the text box.
10. If necessary, enter the flow through Prime Sponsor. If it is not found enter it in the text box that follows.



11. Is this an NIH Tethered or NSF Collaborative proposal? Answer *Yes* or *No*.

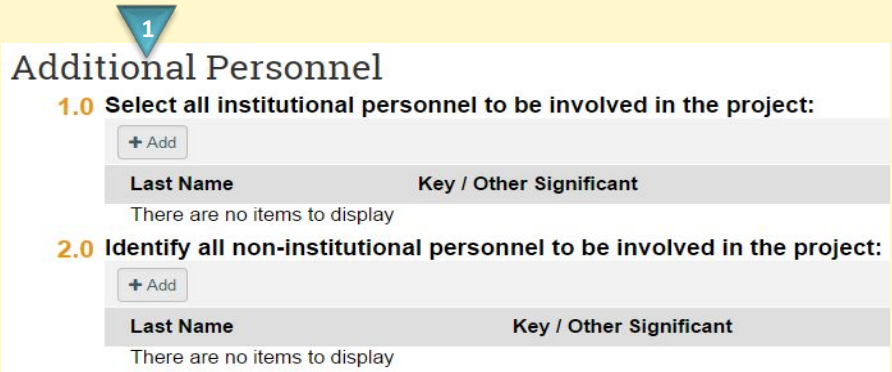
12. Are there other personnel associated with this funding proposal (including key personnel, co-investigators and department staff) who will be included on the budget? Answer *Yes* or *No*.

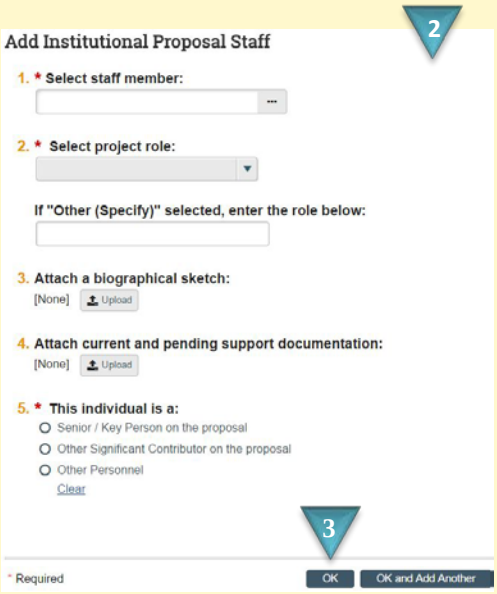
13. Use the progressive text box or … to add team members that should have Edit or Read rights to the funding proposal.

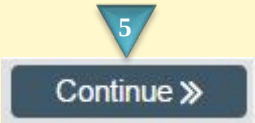
What's next?

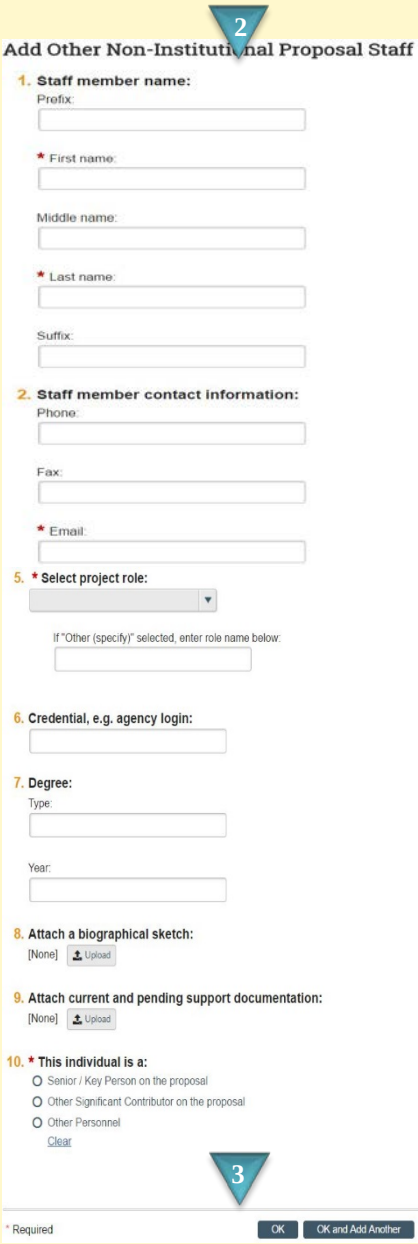
14. Clicking *Continue* will take you to the next SmartForm.

Add Additional Personnel









Where to start?

1. Click *+Add* to include additional institutional and/or non-institutional personnel to the project.

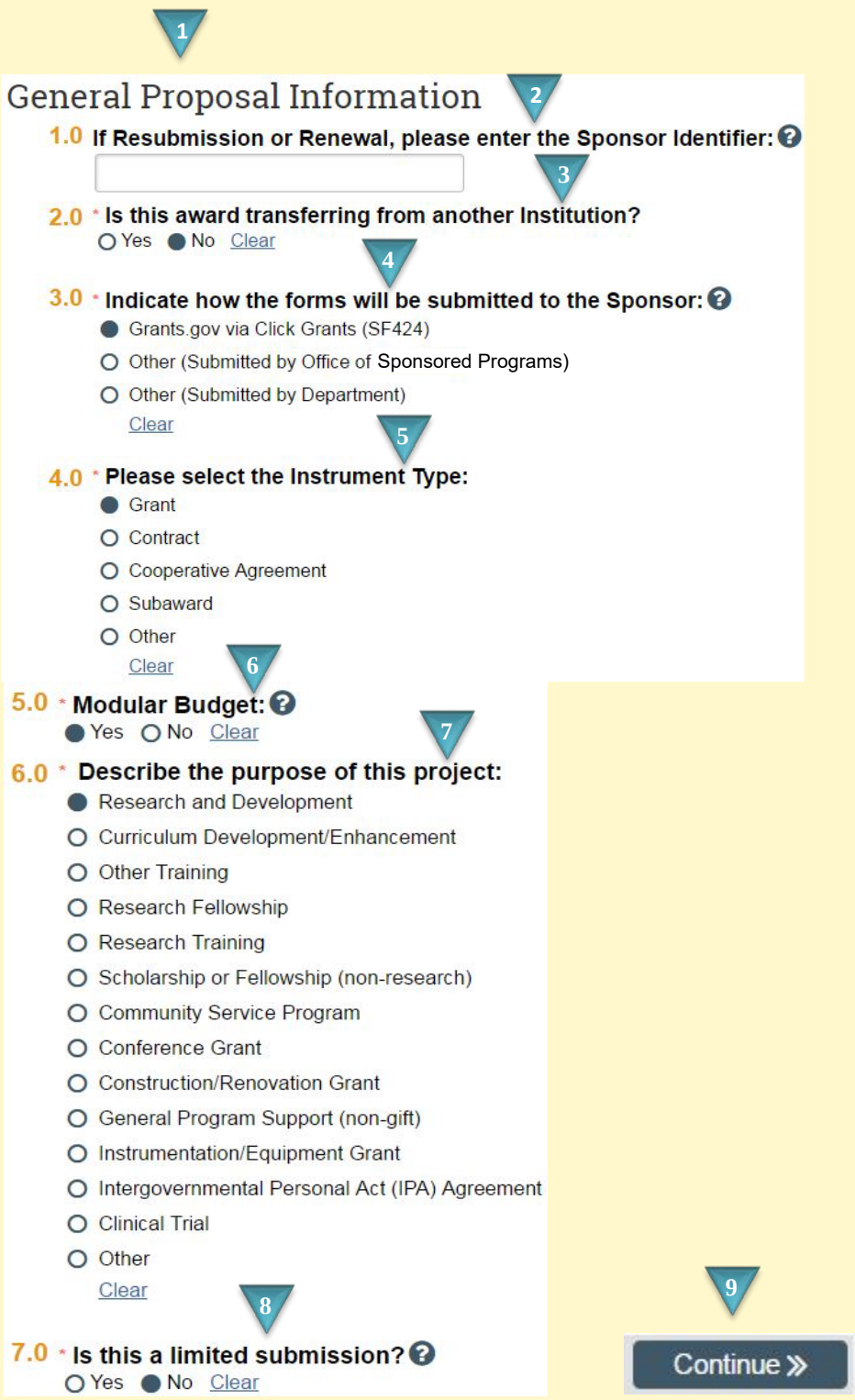
How do I complete the Additional Personnel SmartForm?

2. Complete all required fields. Upload attachments in PDF format.
3. Click *OK* or *OK and Add Another*.
4. Click *Update* if changes are necessary.

What's next?

5. Click *Continue* to move on to General Proposal Information.

Providing General Proposal Information



Where to start?

1. Provide all required General Proposal Information.

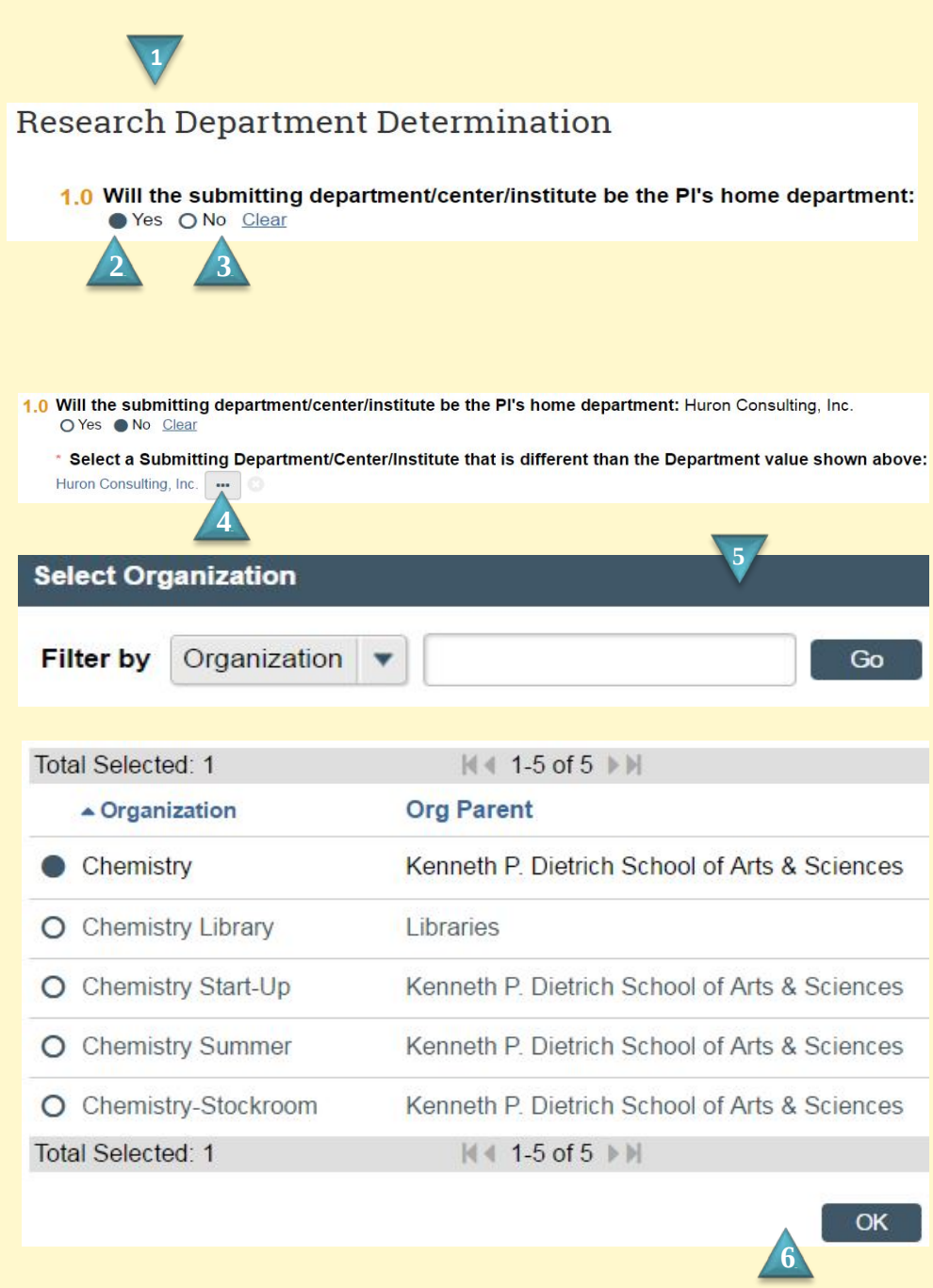
How do I complete the General Proposal Information SmartForm?

2. Provide the Sponsor Identifier if this Funding Proposal is a Resubmission or Renewal
3. Indicate whether or not this funding proposal is for an award transferring from another institution.
4. Indicate how the Funding Proposal will be submitted to the Sponsor.
5. Provide the anticipated instrument type.
6. Indicate whether or not a modular budget is required.
7. Select the purpose of the project.
8. Indicate if this is a limited submission.

What's next?

9. Click *Continue* to provide your Research Department Determination.

Research Department Determination



Where to start?

1. Each individual in the MyFunding module is connected to a data feed that comes directly from the Human Resources (HR) system. As a result, the department listed in a faculty's HR record is what populates as the department when a Proposal is created. For example, if a faculty member's HR record lists the department as "Medicine", the Proposal will be created with that department as the default department. These additional steps are required to specify a faculty member's specific division within that department.

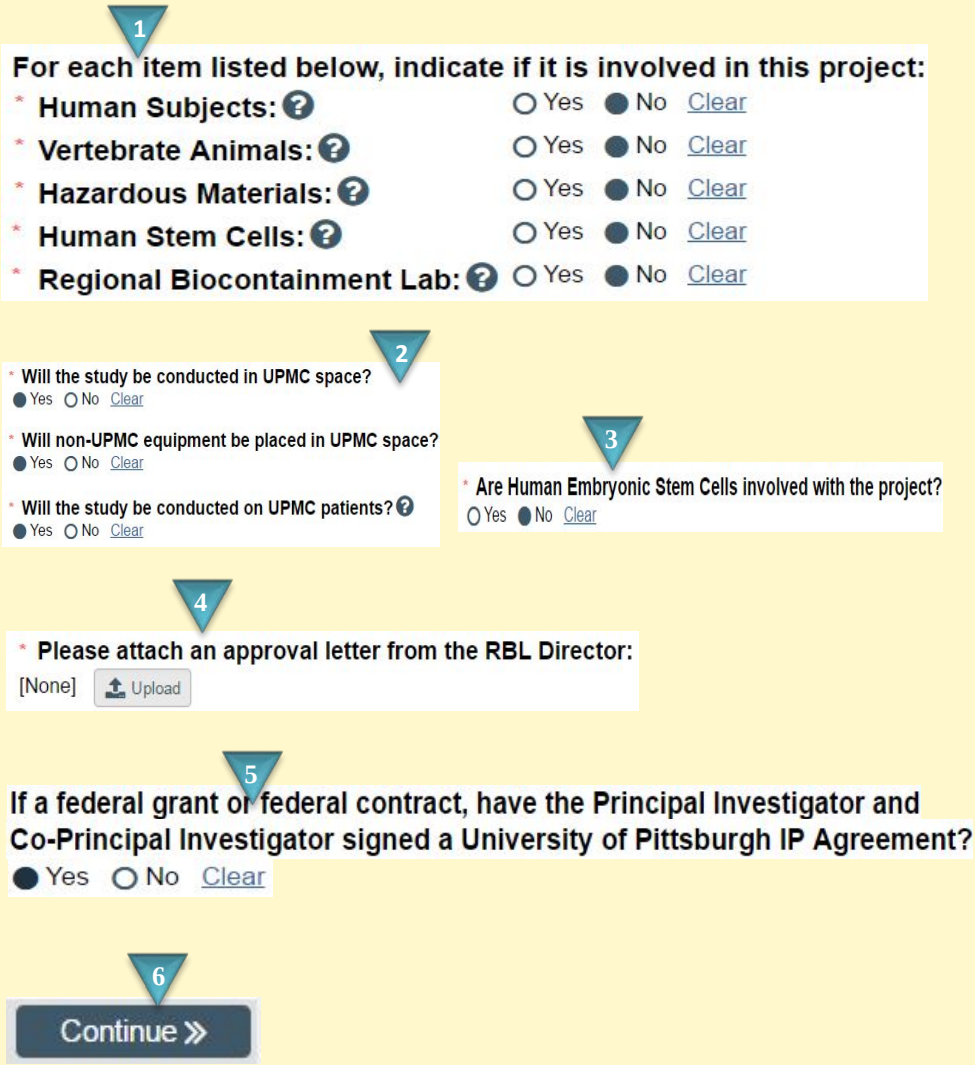
How do I complete the Research Department Determination SmartForm?

2. If the PI home department and submitting department are the same indicate Yes. Continue to Step 7.
3. If the PI home department and submitting department are different indicate No.
4. Click … to select the Department/Center/Institute.
5. Search for your Organization and click *Go*.
6. Select your Organization and click *OK*.

What's next?

7. Click *Continue* to begin Compliance Review.

Compliance Review



Where to start?

1. Answer Yes/No to indicate whether or not the project involves any of the compliance categories.

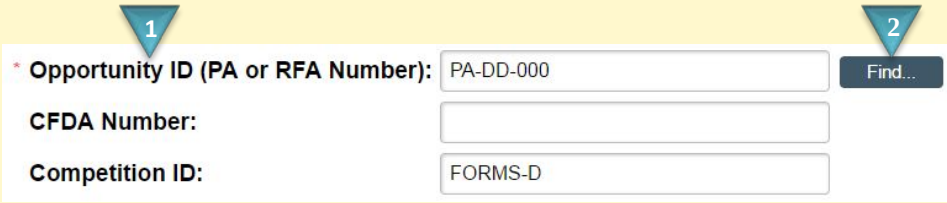
How do I complete the Compliance Review SmartForm?

2. If selecting Yes to Human Subjects complete the questions on UPMC space, equipment, and patients.
3. If selecting Yes to Human Stem Cells indicate if they are Embryonic Stem Cells.
4. If the Regional Biocontainment Lab is being used click *Upload* to attach the approval.
5. If this is a federal grant or contract indicate if an IP Agreement has been signed.

What's next?

6. Click *Continue* to move on to the next section.

Federal Grant Information



Where to start?

1. Enter your PA, RFA, or CFDA Number.

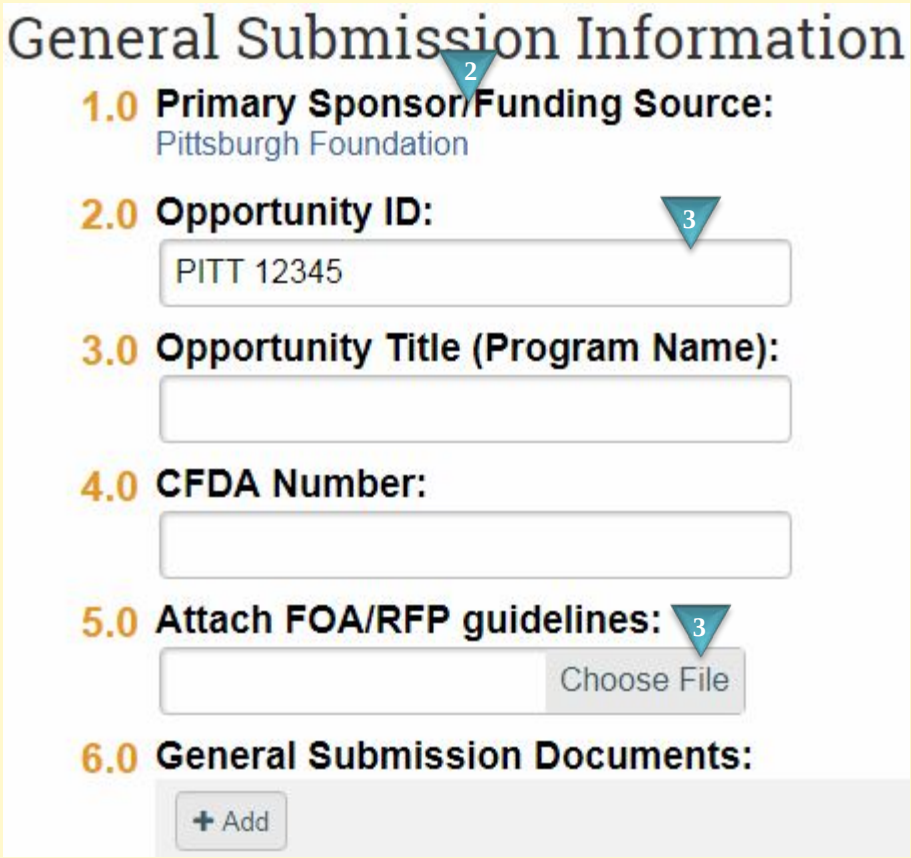
How do I complete the Federal Grant Information SmartForm?

2. Click *Find*.
3. Select the Opportunity.

What's next?

4. Click *Continue* to move on to Funding Opportunity Announcement.

Non-Grants.Gov Submission Information



Where to start?

1. If you choose your submission method as Other (Submitted by Office of Research) or Other (Submitted by Department) you will be prompted to complete the General Submission Information SmartForm.

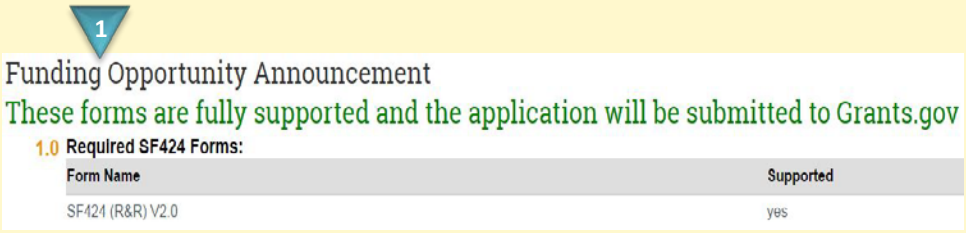
How do I complete the General Submission Information SmartForm?

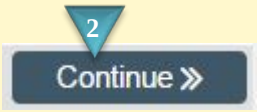
2. The Primary Sponsor will pre-populate from the Proposal Descpiption & Contacts SmartForm.
3. It is required that the Opportunity ID be entered **OR** FOA/RFP guidelines be attached.

What's next?

4. Click *Continue* to move on to Submission Dates.

Funding Opportunity Announcement





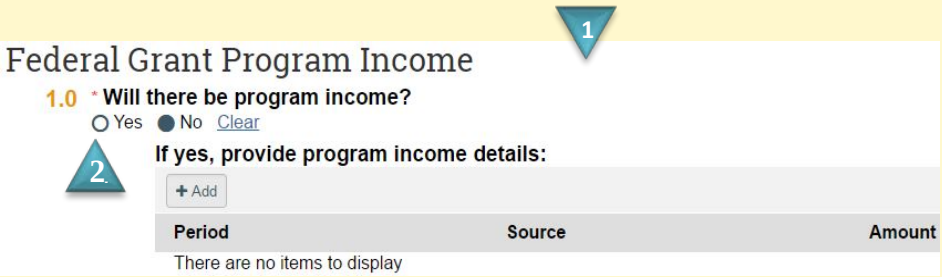
Where to start?

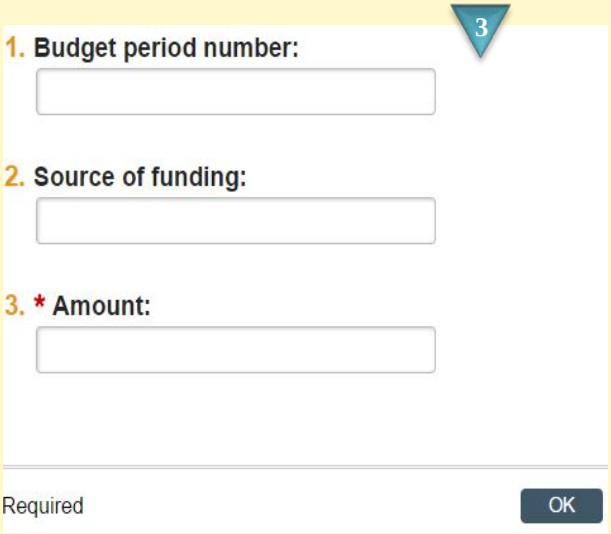
1. Review the Funding Opportunity Announcement page to ensure that the FOA is supported and can be submitted to Grants.gov through the PERIS ™ portal.

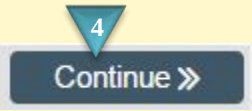
What's Next

2. Click *Continue* to move on to Federal Grant Program Income.

Federal Grant Program Income







Where to start?

1. Determine if the federal grant will generate program income.

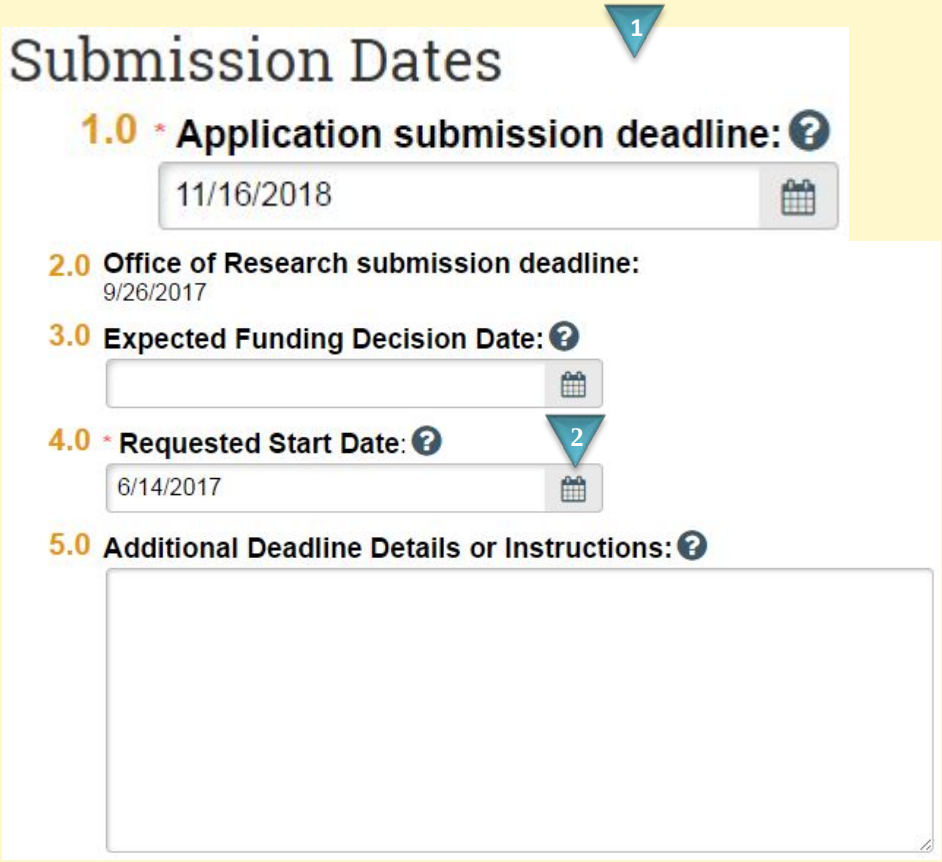
How do I complete the Federal Grant Program Income SmartForm?

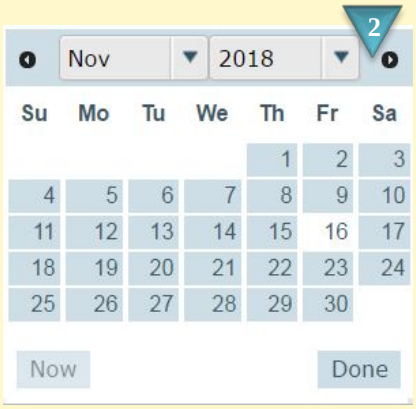
2. If the grant will generate program income, choose Yes.
3. Provide the required information and click OK.

What's Next?

4. Click *Continue*.

Submission Dates





Where to start?

1. Verify or provide the sponsor submission deadline.

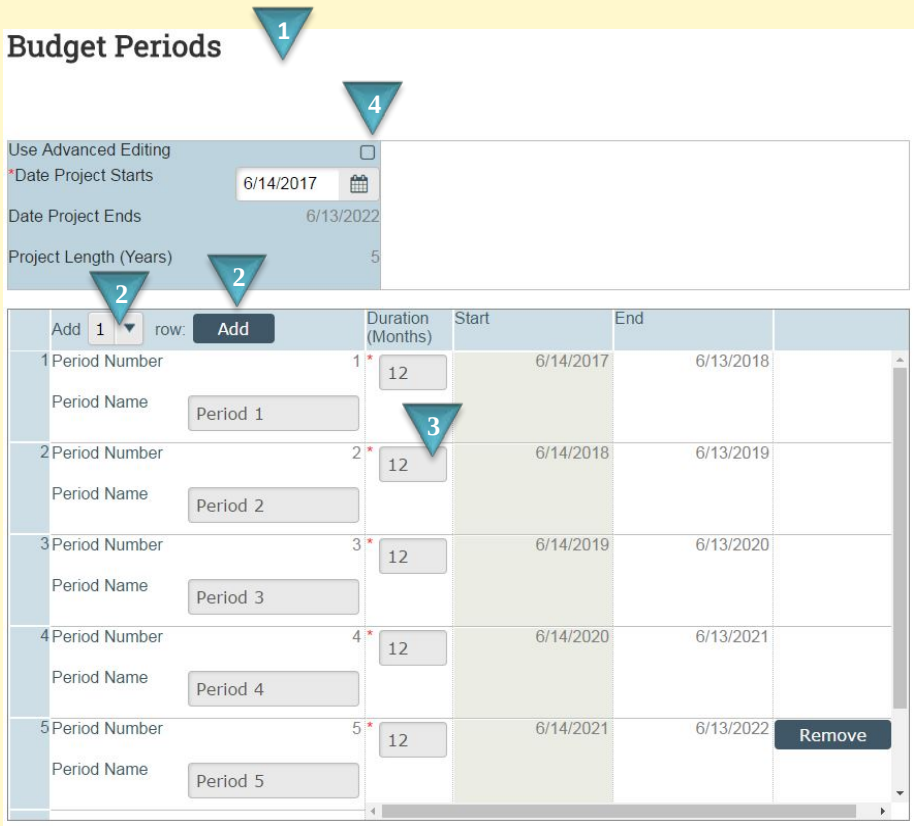
How do I complete the Submission Dates SmartForm?

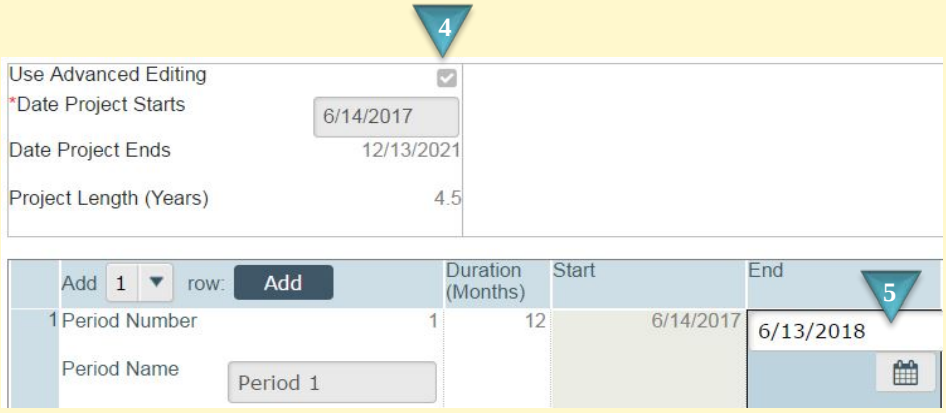
2. Update fields by providing dates in mm/dd/yyyy format or by clicking the calendar icon.

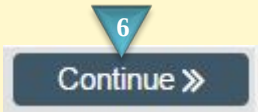
What's Next?

3. Click *Continue*.

Budget Periods







Where to start?

1. Review the pre-populated budget periods.

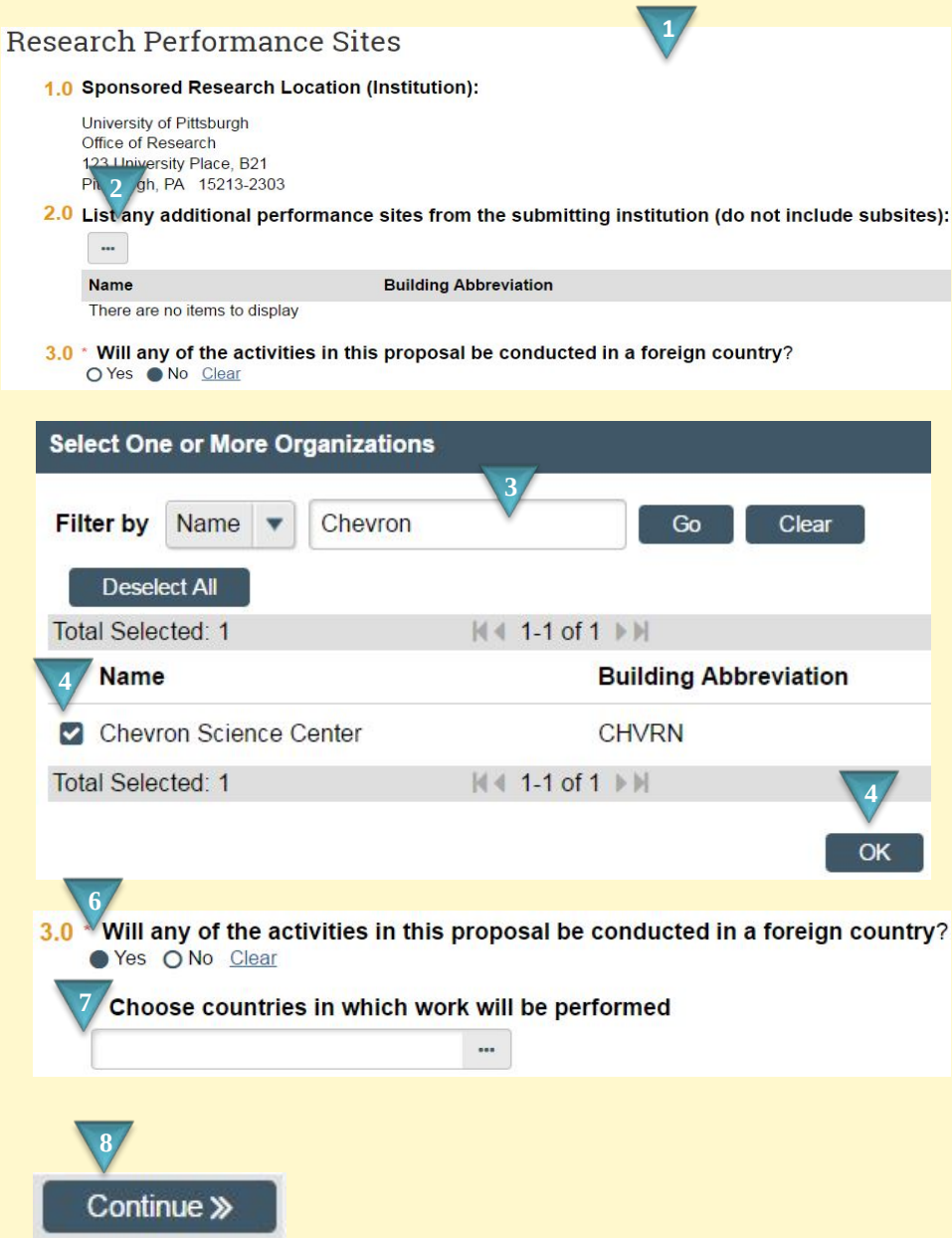
How do I complete the Budget Periods SmartForm?

2. Add additional budget periods by selecting the amount and clicking *Add*.
3. Change the duration of a period by clicking in a Duration (Months) text box. Click *Save* for the dates to recalculate.
4. Open Advanced Editing to enter complex budget periods.
5. In Advanced Editing choose the calendar or enter dates in mm/dd/yyyy format.

What's Next?

6. Click *Continue*.

Research Performance Sites



Where to start?

1. Determine what performance sites in addition to the Institution Sponsored Research Location need to be added to the funding proposal.

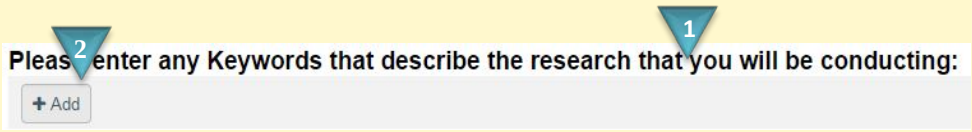
How do I complete the Research Performance Sites SmartForm?

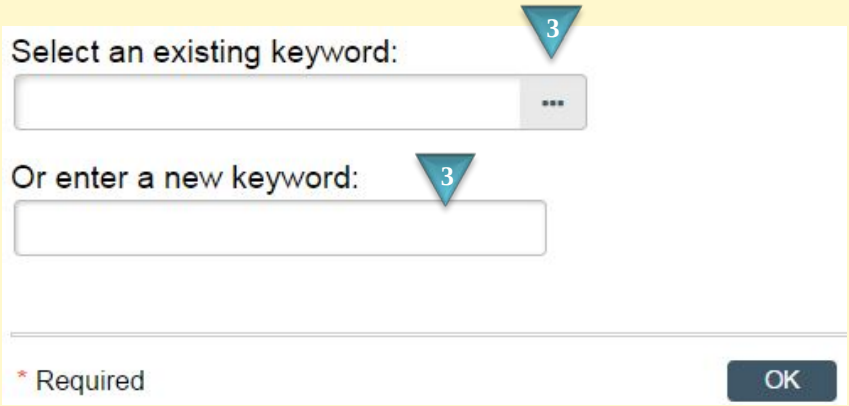
2. Click … to add a performance site.
3. Use the text box to enter the name and click *Go*.
4. Select the site and click *OK*.
5. Add additional sites by repeating steps 2-4.
6. If activities will be conducted in a foreign country select yes, if not, select No.
7. If yes, use the progressive text box to find the country or click … to search.

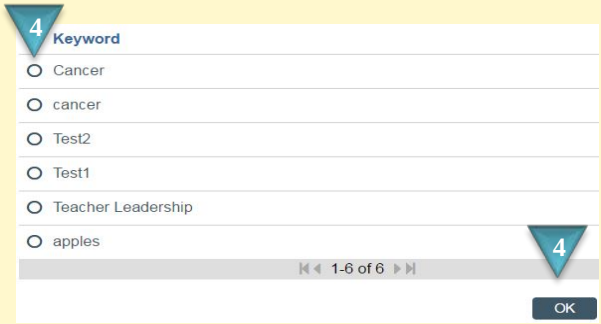
What's Next?

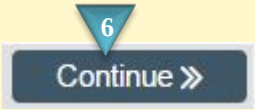
8. Click *Continue*.

Keywords









Where to start?

1. Decide what keywords best describe the funding proposal.

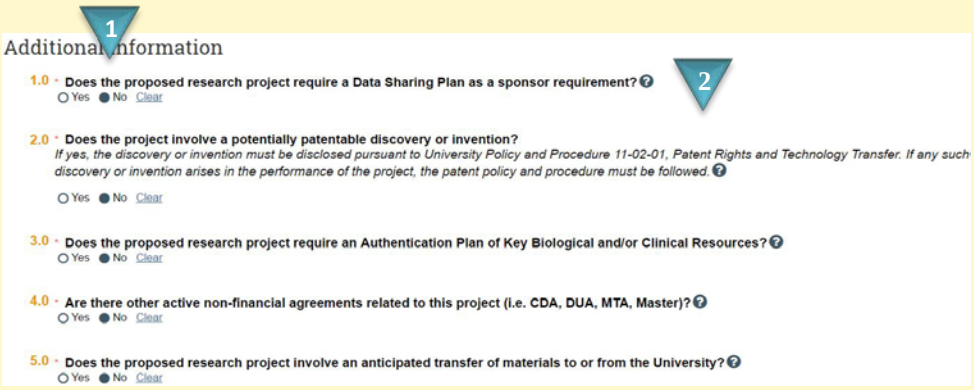
How do I complete the Keywords SmartForm?

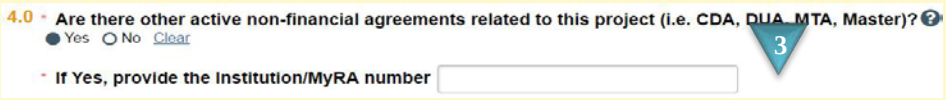
2. Click *+ Add*.
3. Click … to select an existing keyword or enter a new keyword in the textbox.
4. If choosing an existing keyword, select and click *OK*.
5. Click *OK* or *OK and Add Another*.

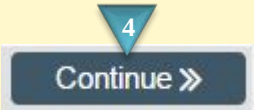
What's Next?

6. Click *Continue*.

Additional Information







Where to start?

1. Provide additional information regarding the funding proposal.

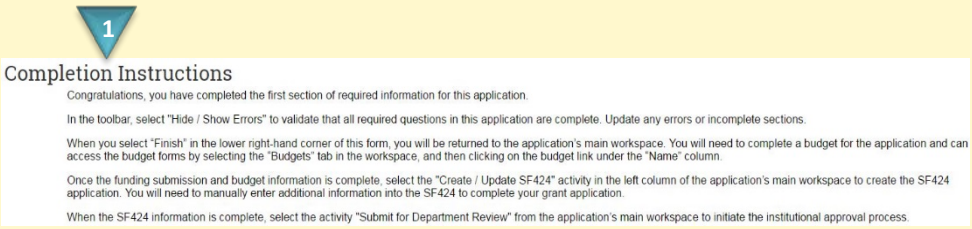
How do I complete the Additional Information SmartForm?

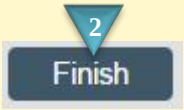
2. Answer Yes/No as to whether or not the funding proposal requires a Data Sharing Plan, involves a patentable discovery, requires an Authentication Plan, has a related non-financial agreement, or involves the transfer of materials.
3. If there is an active non-financial agreement related to the project provide the Institution/MyRA number.

What's Next?

4. Click *Continue*.

Completion Instructions





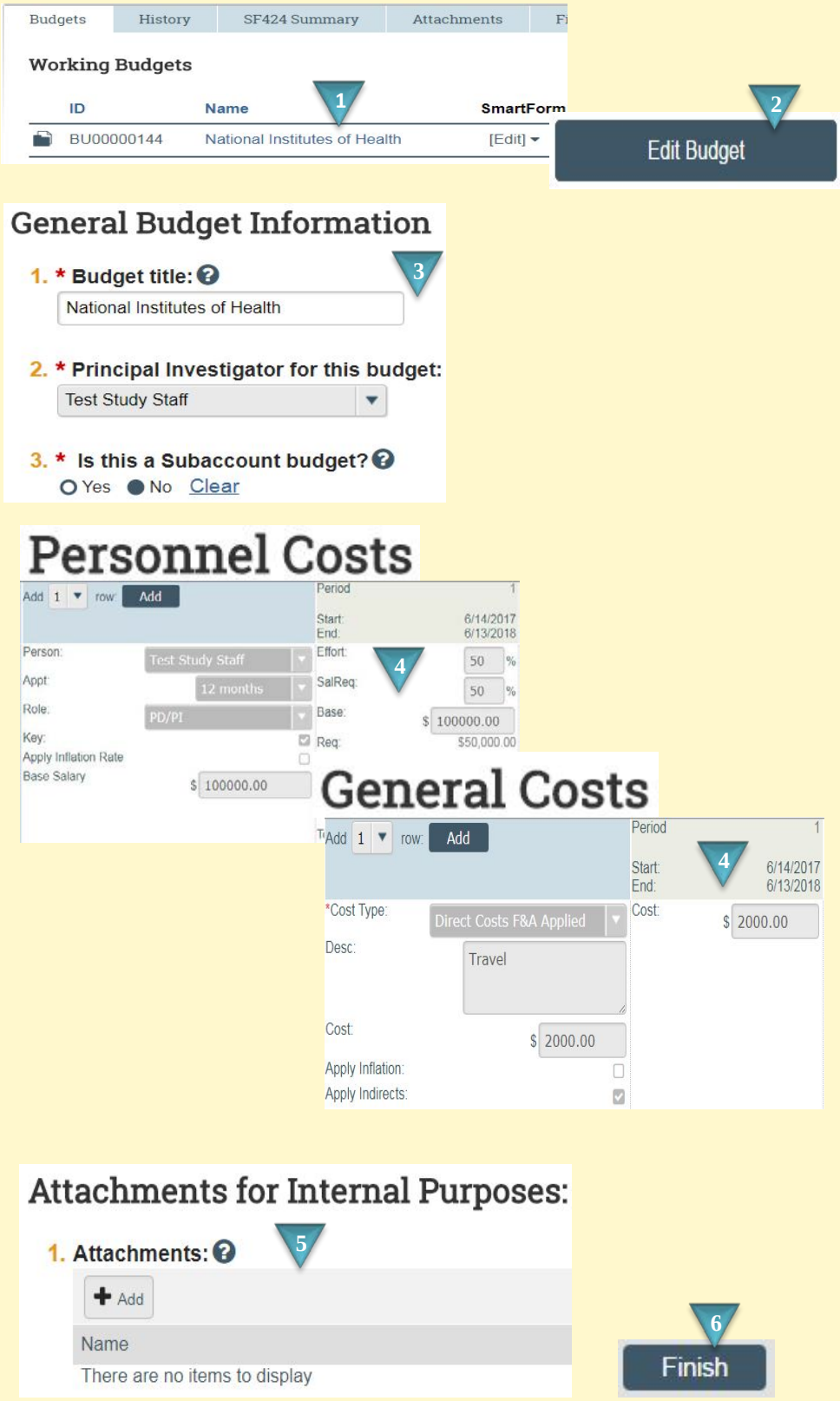
Where to start?

1. Review the Completion Instructions as it provides information on the next steps to take to prepare and submit the funding proposal.

How do I complete the Completion Instructions SmartForm?

2. Click *Finish*.

Budgets



Where to start?

1. With the Funding Proposal open and the Budgets tab selected, click the name of the Budget to open.
2. Click *Edit Budget*.

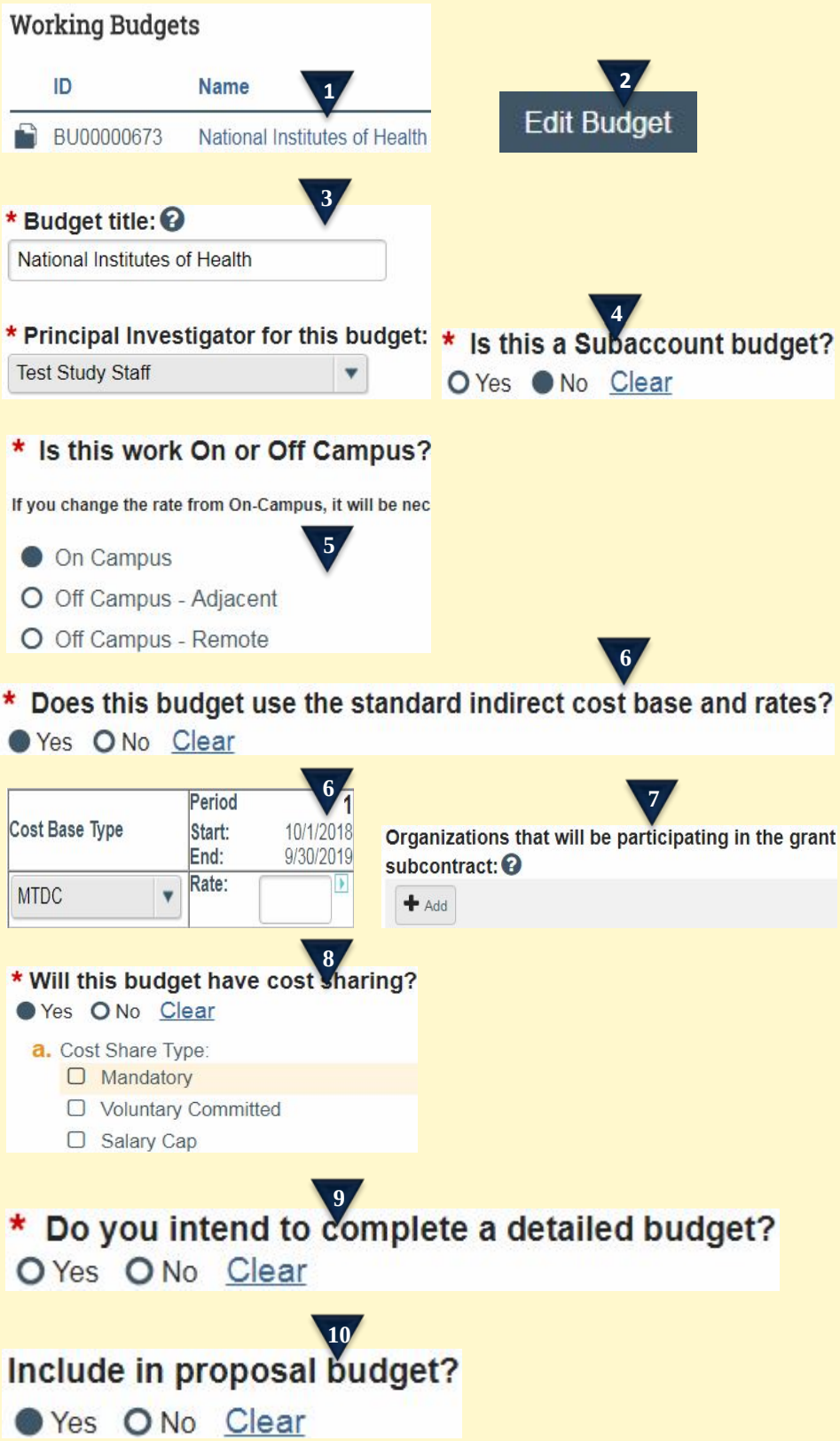
How do I complete the Budget?

3. Supply general budget information and click *Continue*.
4. On each budget grid:
   a. Set budget variables such as inflation rate.
   b. Select the number of line items you want to create and click *Add*.
   c. Supply the requested cost information for each item.
   d. Click *Continue*.

How do I finish the budget?

5. On the last page click *Add* if you want to attach supporting documents such as instructions or a budget justification.
6. When satisfied with your budget entries and attachments click *Finish*.

Creating a Detailed Budget



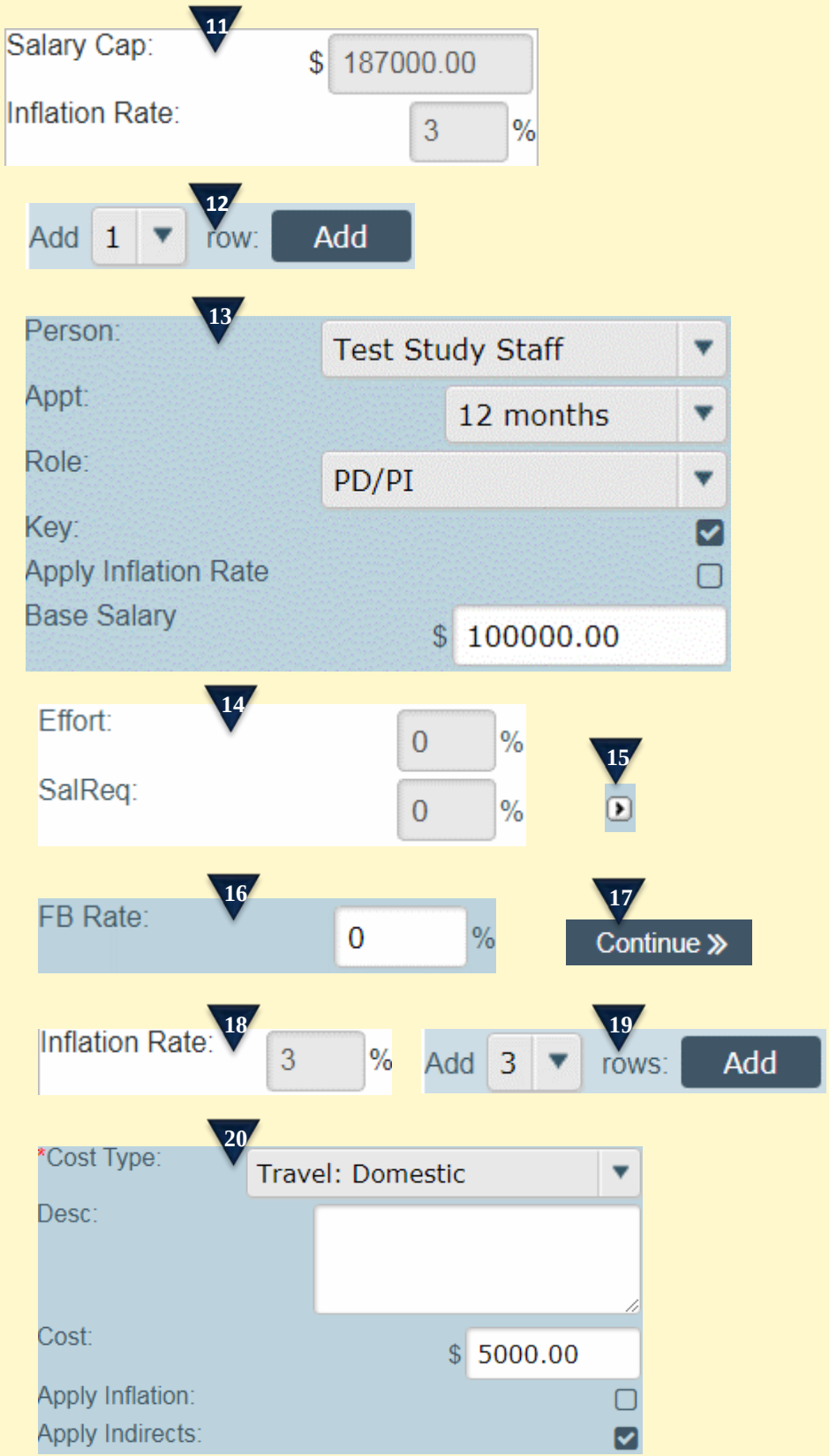
Where to start?

1. Click on your budget link to access the Budget Workspace.
2. Click *Edit Budget*.

How do I complete the budget SmartForm?

3. The Budget title and Principal Investigator will default to entries made in the Funding Proposal.
4. If this is a Subaccount indicate Yes. *See Subaccount guide for instructions.
5. Indicate if the work is On or Off Campus. If you change the rate from On-Campus click Save for the correct rates to appear.
6. Determine if the budget uses the standard indirect cost base and rates. If not select *No*. A table will appear where you can provide the Base Type and rates being used. You will also need to indicate why standard rates are not being used.
7. If a subaward is being issued, click *+Add*. *See Subaward guide.
8. Indicate if there is cost share. If Yes, choose the Type.
9. Answer Yes that a detailed budget is being completed.
10. Multiple budgets can be created in MyFunding. Use this question to indicated that this is the budget that is to be included in the application.

Creating a Detailed Budget



How do I complete the Personnel Costs SmartForm?

11. Review pre-populated Salary Cap and Inflation Rate entries. Edit if necessary.

12. Choose the number of individuals that you are adding to the budget and click *Add*.

13. Select the Person, their Appointment, and Role. Choose if inflation should be applied to the salary and enter the base salary.

14. Enter the Percent of Effort and percent of Salary Requested.

15. Use the > function if you would like to push figures across all rows.

16. The Fringe Benefit Rate will pre-populate. If editing is necessary, click on the FB Rate field and provide the new rate.

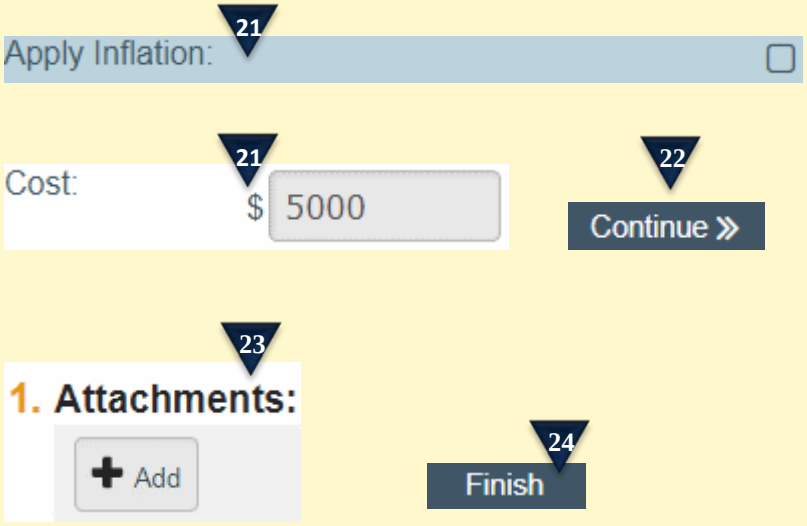
17. When Personnel Costs are complete click *Continue*.

How do I complete the General Costs SmartForm?

18. Review the pre-populated Inflation Rate. Edit if necessary.

19. Choose the number of general cost categories that are budgeted and click *Add*.

20. Choose a Cost Type. Indirect Costs will be included or excluded based on the Cost that is selected. If adding Equipment a Description is required. Enter the Cost. Apply Inflation if necessary.



21. To edit a cost uncheck Apply Inflation. Click in the field that you would like to edit and provide the new figure.

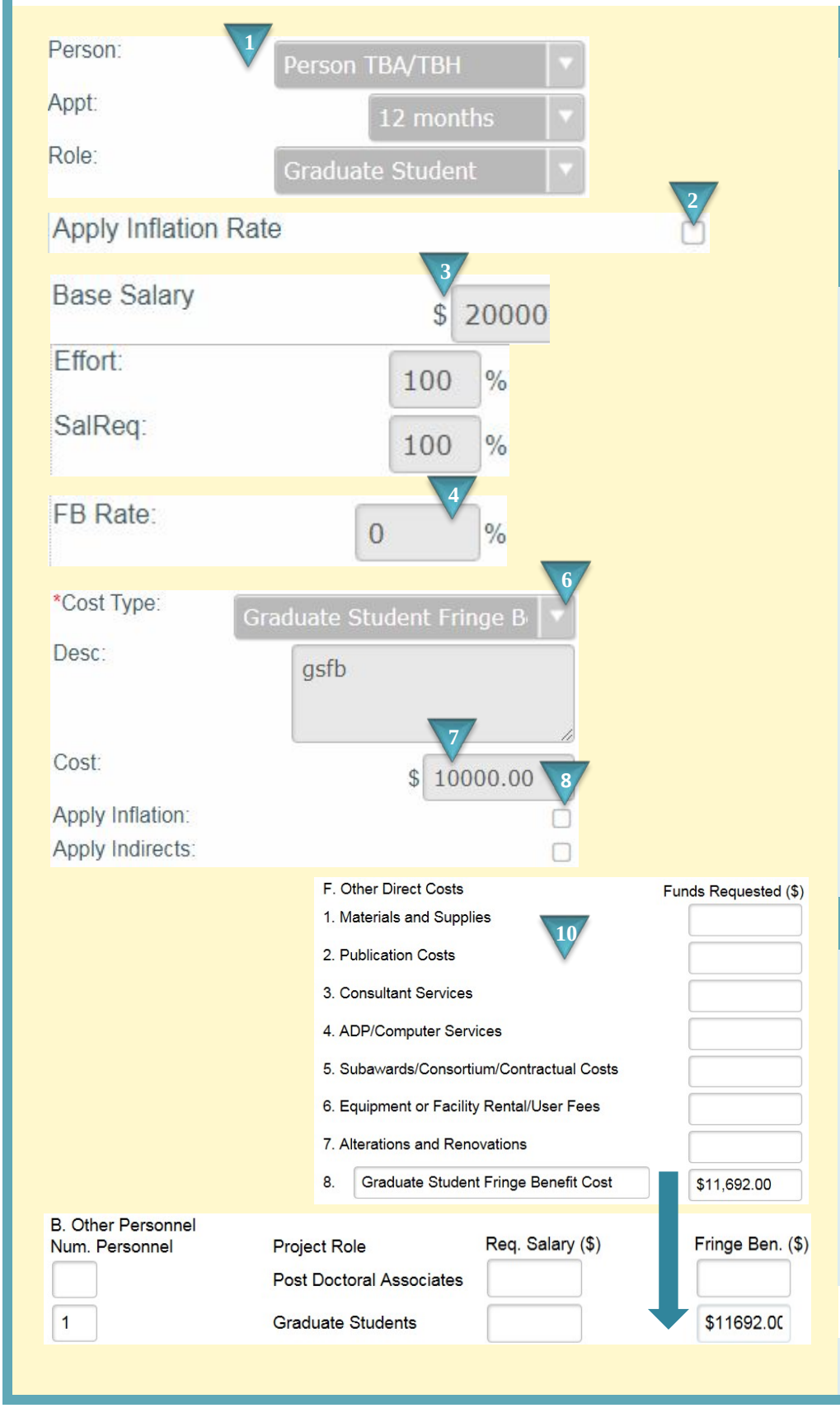
22. Click *Continue* when General Costs are complete.

How do I finish my budget?

23. Attach any budget related forms that are required for internal purposes. This may include a budget justification.

24. Click *Finish*.

Excluding Graduate Student Fringe Benefits



Where to start?

1. In the Personnel Costs section of your budget add a Graduate Student.

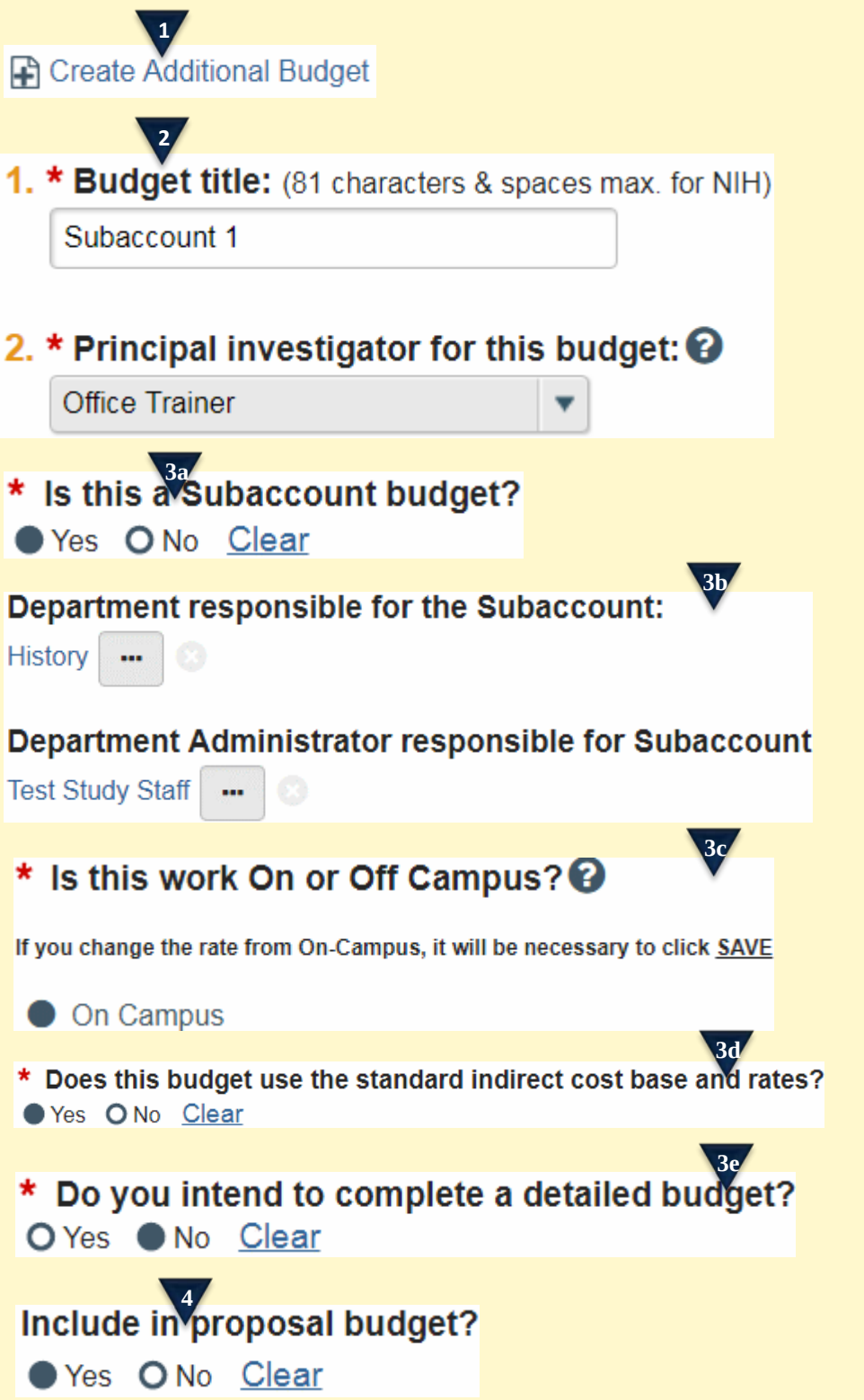
How do I exclude Graduate Student Fringe Benefits from my budget?

2. Choose if you would like to apply inflation.
3. Enter the Base Salary, Effort, and Salary Requested.
4. Leave the FB Rate cell as 0.
5. When your Personnel Costs are complete click Continue.
6. In the General Costs section add a row to the budget table and select Graduate Student Fringe Benefits as the Cost Type. This Cost Type will be excluded from Indirect Costs.
7. Enter the fringe benefit cost.
8. Apply Inflation if necessary.

What's Next?

9. Click *Continue* when General Costs are complete.
10. Once the SF-424 is generated, the Graduate Student Fringe benefit costs should be manually moved from the Other Direct Cost section (Section F of the SF-424) to the Other Personnel section (Section B of the SF-424.)

Creating a Subaccount



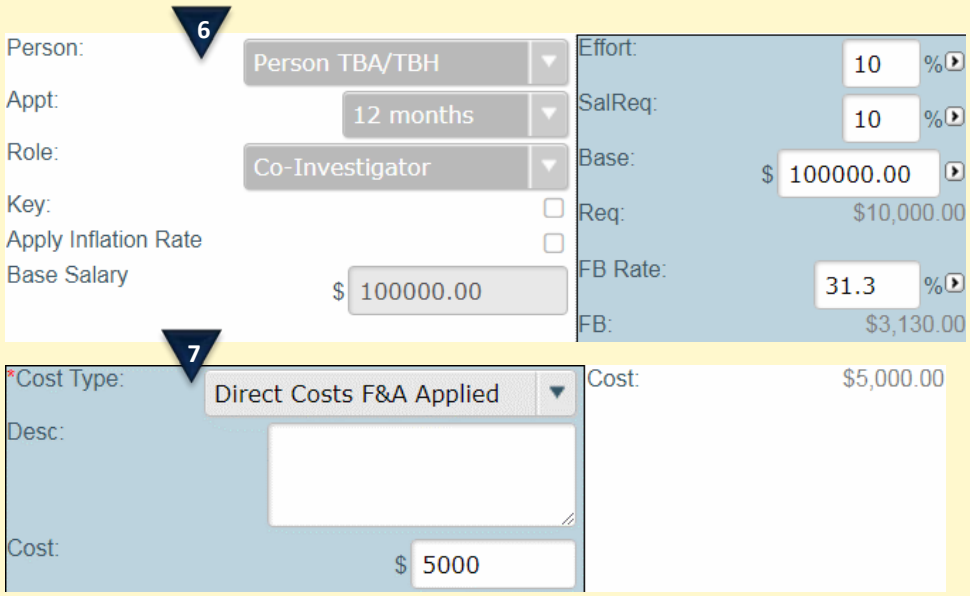
Where to start?

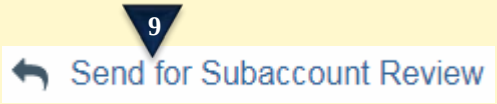
1. From the Workspace click *Create Additional Budget*.

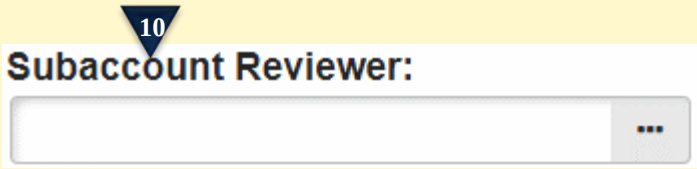
How do I create the subaccount?

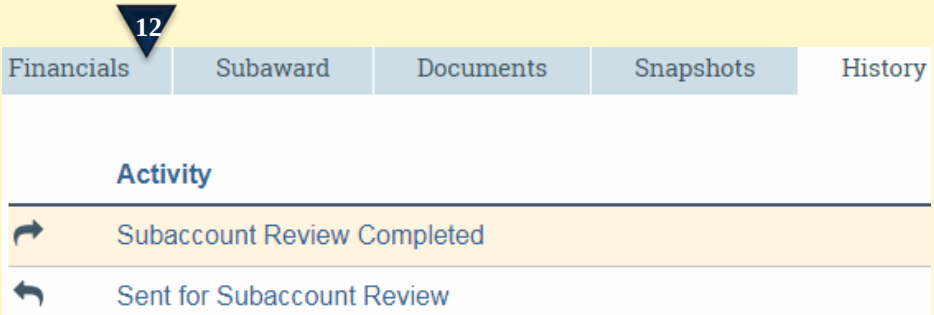
2. Give the budget a title and select the Subaccount PI.
3. Complete the General Budget Information SmartForm.
   a. Indicate yes, this is a Subaccount budget.
   b. Select the Subaccount Department and Department Administrator.
   c. Indicate if the work is On or Off Campus. If you change the rate from On-Campus click Save for the correct rates to appear.
   d. Determine if the budget uses the standard indirect cost base and rates. If not select *No*. A table will appear where you can provide the Base Type and rates being used. You will also need to indicate why standard rates are not being used.
   e. Indicate if a detailed budget is being completed for the subaccount. If No, an upload will be required.
4. Determine if this subaccount budget should be rolled into a master budget. If so select *Yes*. If the subaccount costs were included in the master budget or If your budget is modular select *No*.
5. Click *Continue*.

Creating a Subaccount









6. If you are completing a detailed budget for the subaccount enter your Personnel and General Costs. *See Creating a Detailed Budget Quick Guide for more information.

7. If you are not completing a detailed budget for the subaccount enter the Direct Costs F&A Applied and/or Direct Costs F&A not Applied for General Costs.

8. Attach and subaccount documents that are required for internal purposes and click *Finish*.

How do I send the Subaccount for review?

9. In the Subaccount Budget workspace click *Send for Subaccount Review*.

10. Choose the Subaccount Reviewer. This is the individual that will review and approve the subaccount.

11. Add Comments or attachments if necessary and click *OK*.

12. The History tab in your subaccount workspace will show that the subaccount was sent for review and when the review is completed.

Creating a Subaccount

13

All subaccount budgets must be approved before routing begins. If a funding proposal is routed prior to the approvals being obtained there will be no option for the subaccount department to approve the subaccount budget.

14

The subaccount departments will only see the budget that you as the master department have routed to them for approval.

15

No, the solution does not have the capability to create modular budgets from multiple budgets. When a modular budget is being submitted for the overall proposal, the subaccount budget feature should be used as a routing tool to obtain approval for the subaccount, but that budget should not be included in the proposal.

Instead, one cumulative budget should be created that includes all costs for the project. That budget should be included in the proposal. The solution will use the cumulative budget to create the modules.

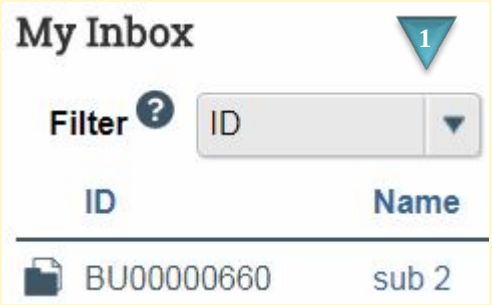
Subaccount Tips

13. Can I route a proposal without an approved subaccount budget?

14. Will the subaccounts only see their subaccount budget, or will they see the entire budget?

15. Does the MyFunding module create modular budgets with the subaccount budgets included?

Approving a Subaccount

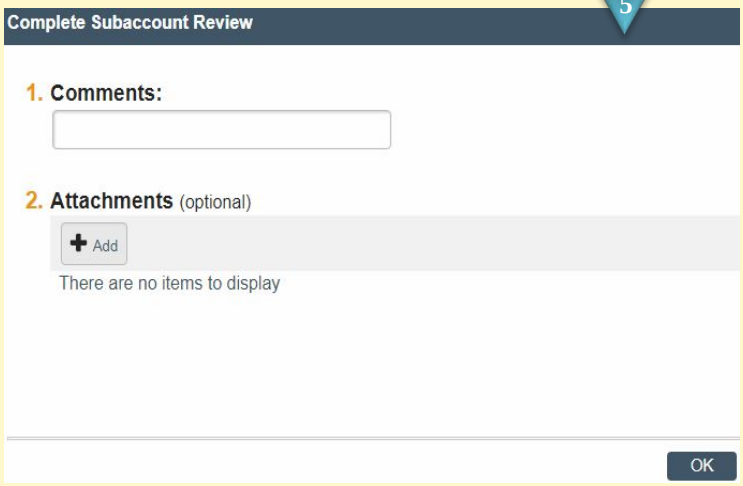


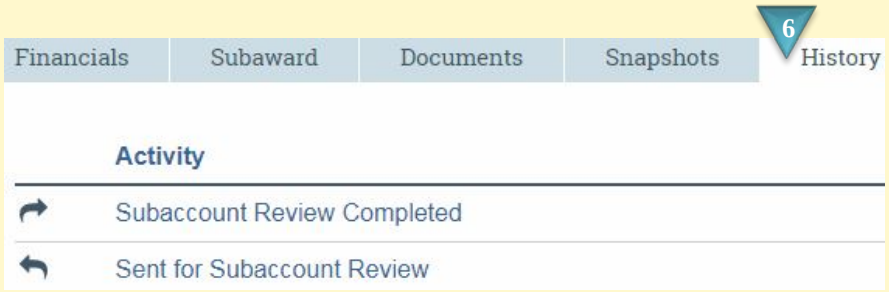
2

Period 1	Period 2	Period 3	Period 4	Period 5	Cumulative
$3,090	**$3,090**	**$3,090**	**$3,090**	**$3,090**	**$15,450**
$2,500	$2,500	$2,500	$2,500	$2,500	$12,500
$590	$590	$590	$590	$590	$2,950
$5,000	**$5,150**	**$5,305**	**$5,464**	**$5,628**	**$26,547**

3 Edit Budget

4 Complete Subaccount Review





Where to start?

1. After logging in access your subaccount budget from My Inbox.

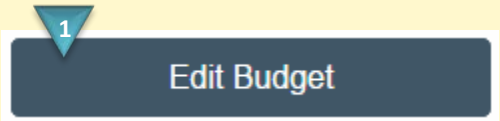
How do I review the subaccount?

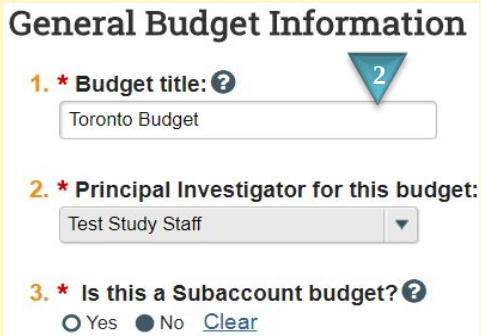
2. Review from your budget workspace.
3. To make changes click *Edit Budget*.

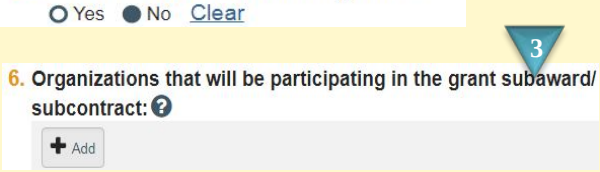
What's Next?

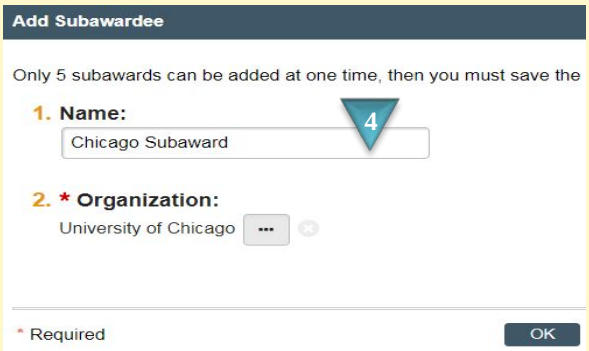
4. Click *Complete Subaccount Review*.
5. Add comments or attachments if necessary and click *OK*.
6. The History tab of the subaccount budget will track the review process.

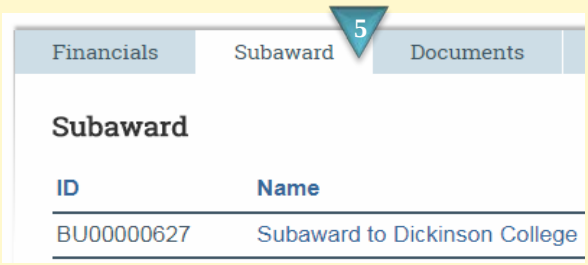
Subawards

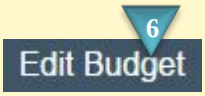


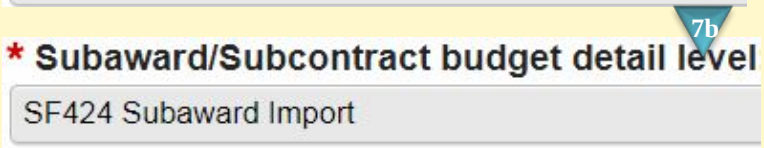










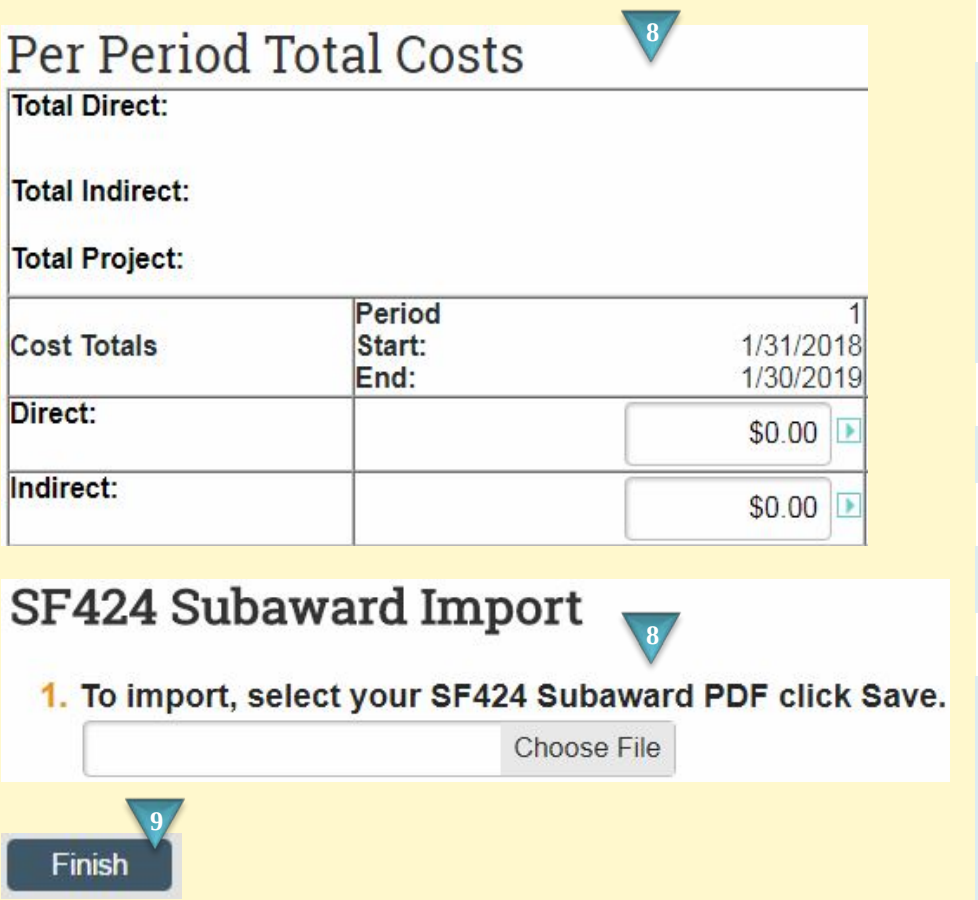


Where to start?

1. From the Budget Workspace click *Edit Budget*.

How do I create the Subaward Budget?

2. Give your main Budget a title and select the PI.
3. Complete the General Budget Information SmartForm.
   a. Click *+Add* to provide the subaward organization.
4. Name the Subaward. Choose … to search for and select the Organization. Click *OK*. Complete General Budget Information and *Continue*.
5. Once the main budget is complete click the Subaward tab in the Budget Workspace. A link to your subaward(s) will be located there.
6. Click Edit Budget to complete Subaward Budget Information.
7. Complete the Subaward/Subcontract SmartForm.
   a. If Per Period Direct and Indirect Totals is selected as the budget detail level, you will provide total costs.
   b. If SF424 Subaward Import is selected, you will upload a SF424 Subaward PDF.



8. Enter your Direct and Indirect Totals or import your subaward budget. The subaward budget template must be the 6/30/16 version.

9. Provide any additional attachments and click *Finish*.

Routing

Where to start?

1. Once the Funding Proposal is complete click *Submit for Department Review*.

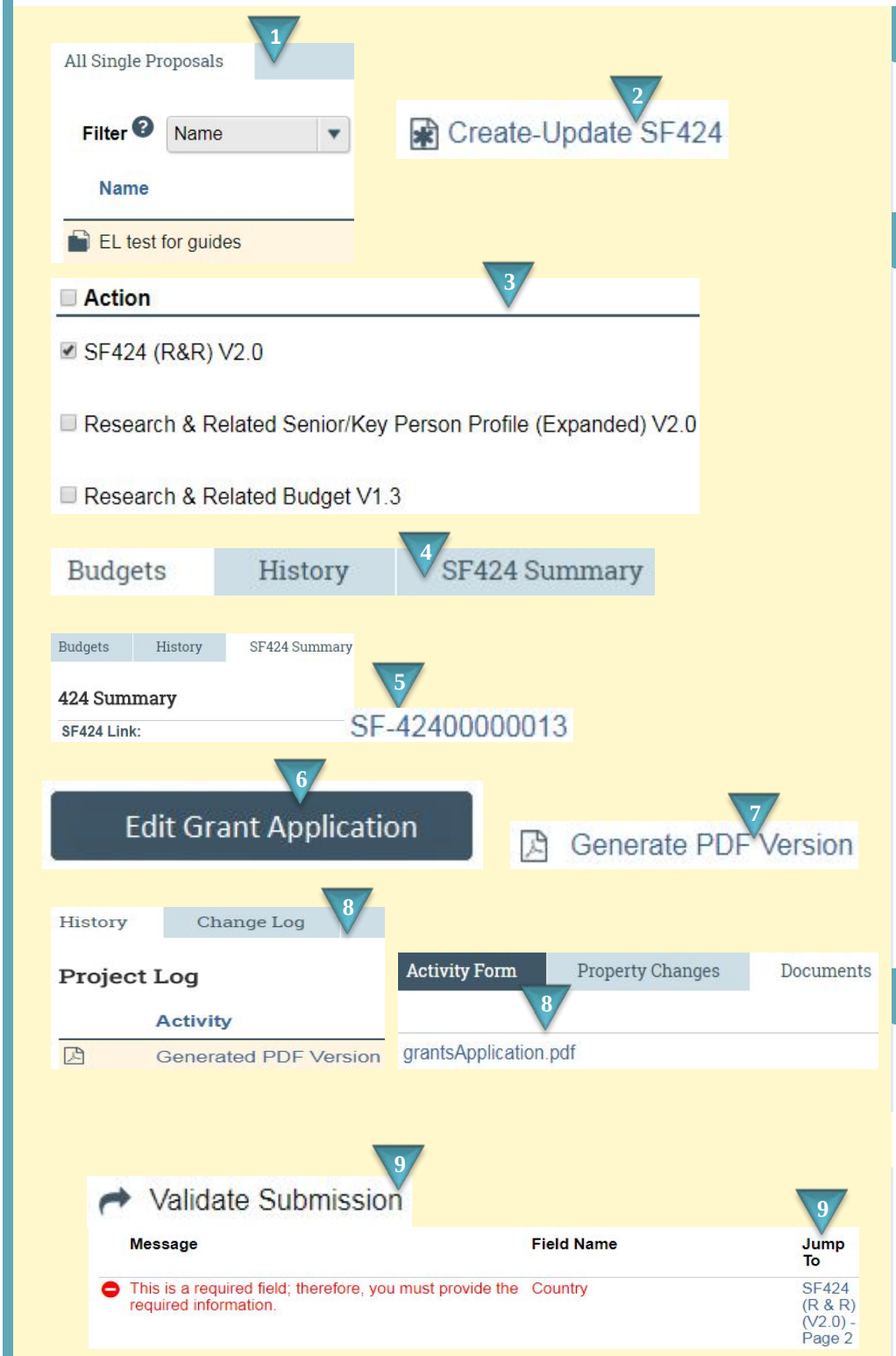
How do I request changes in a Funding Proposal?

2. If changes are necessary, the department or sponsored programs office may ask that the funding proposal be updated by clicking the Request Changes activity.
3. Changes can be submitted by clicking a *Submit Changes* activity.

How do I finish routing the Funding Proposal?

4. Click *Approve* to route for Specialist Review. Clicking *Disapprove* will move the application to a Withdrawn state.

Create SF424



Where to start?

1. In My Inbox or on the Grants page, click the name of the proposal you would like to create a SF424 for.

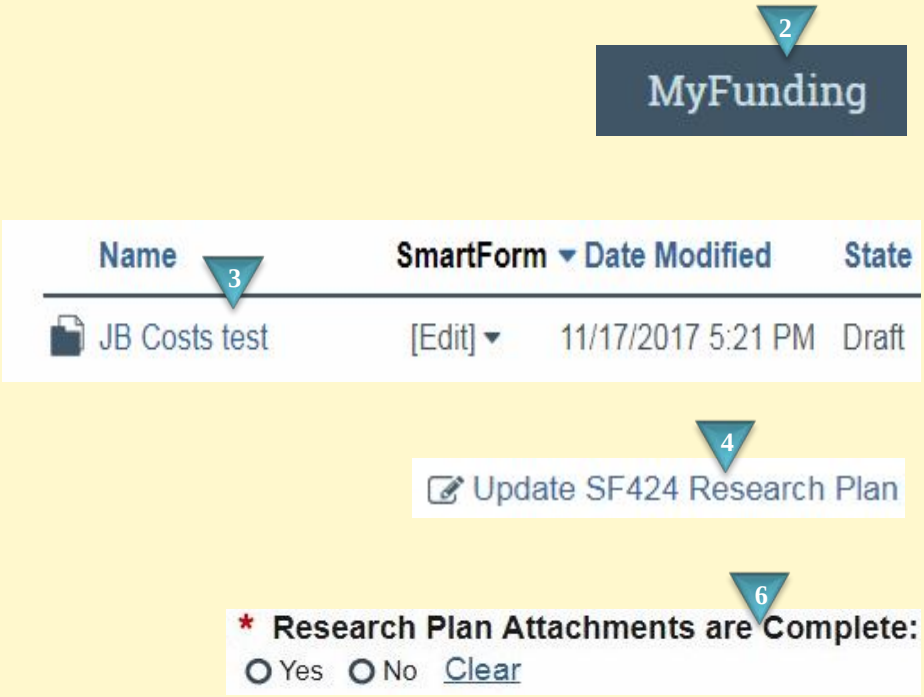
How do I create the SF424?

2. Click *Create-Update SF424*.
3. Select the forms you want to include in the SF424 application and click *OK*.
4. Click the *SF424 Summary* tab.
5. Click the SF424 link to open the SF424 Workspace.
6. Click *Edit Grant Application* to add or modify data in the SF424 as needed. Click *Hide/Show Errors* to navigate to and correct errors in in SF424.
7. Click *Generate PDF version* to create a PDF of the application.
8. Click the *Generated PDF Version* activity from the workspace and then the Documents tab to view the PDF.

How do I finish the SF424?

9. Click *Validate Submission* to list any errors in need of correction.

Grants.Gov Research Plan Upload and PI Certification



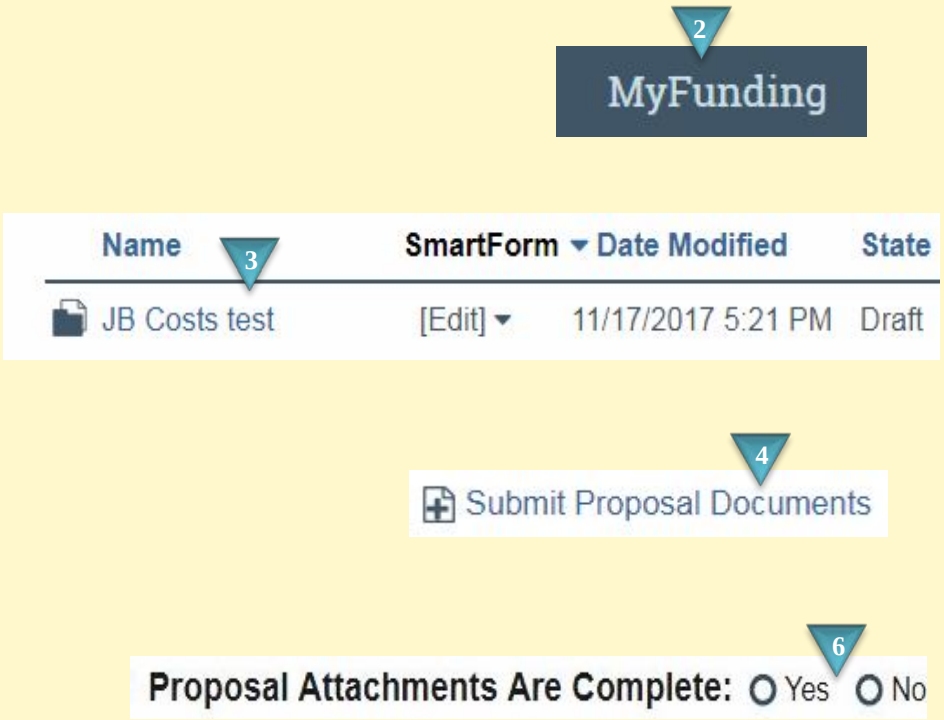
Where to start?

1. If you have not already done so log in to Peris™
2. Click on the *MyFunding* tab.
3. Click on the funding proposal that requires a research plan.

How do I upload a Research Plan?

4. In the funding proposal workspace click *Update SF424 Research Plan*.
5. Upload the required sections of the Research Plan.
6. Indicate Yes if the Research Plan is complete. No if it is not. If it is complete a PI Certification notification will be sent.
7. Click *OK*

Non-Grants.Gov Proposal Attachments and PI Certification



Where to start?

1. If you have not already done so log in to Peris™
2. Click on the *MyFunding* tab.
3. Click on the funding proposal that requires a proposal document to be attached.

How do I upload Non-Grants.Gov Proposal Documents?

4. In the funding proposal workspace click *Submit Proposal Documents*.
5. Upload the Proposal Documents.
6. Indicate if the Proposal Attachments are complete. If they are complete a PI Certification notification will be sent.
7. Click *OK*

How to Complete the PI Certification (Faculty Requirements)

1

Funding Proposal ID:	FP00000214 Click on link to go to the proposal.
PI Name:	System Administrator
Department:	Huron Consulting, Inc.
Title:	HB Test - Revision
Sponsor:	National Institutes of Health

3

Submit PI Certification

As the PI, I understand and certify:

1. That the information contained herein is true, complete and accurate to the best of my knowledge;
2. That any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties; and
3. That I agree to accept responsibility for the scientific [illegible]ct of the project and to provide the required progress reports if an award is received as a [illegible]ult of this application.

4

By checking the box, I certify the above is true: ☐

6

PI Certification Yes

Where to start?

1. Once a notification has been received that a PI Certification is ready to submit click the link in the notification to go to your funding proposal workspace.
2. If you are not already logged in you will be asked to do so.

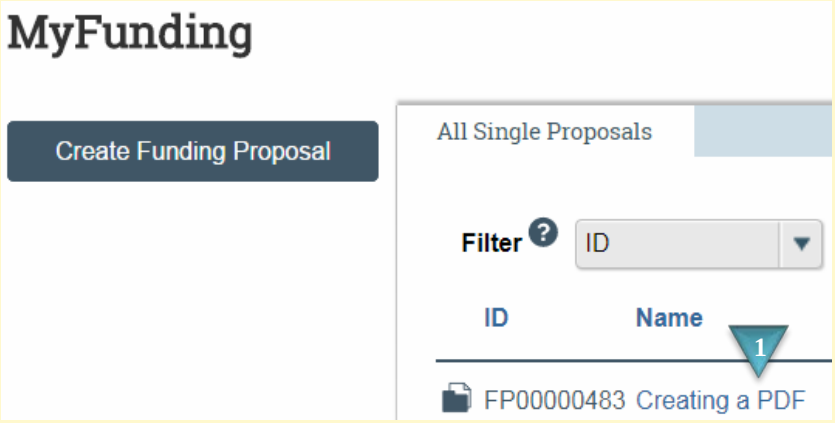
How do I submit a PI Certification?

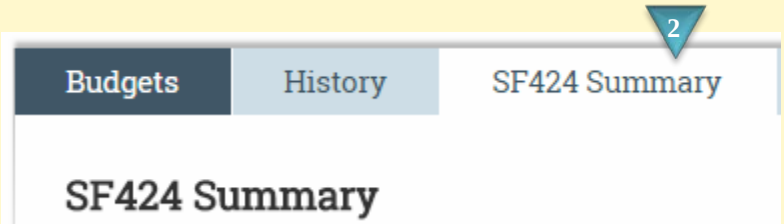
3. In the funding proposal workspace click *Submit PI Certification*.
4. Read the certification and check the box if true.
5. Click *OK*

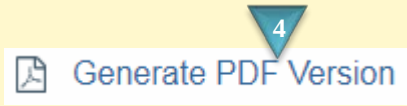
What's Next?

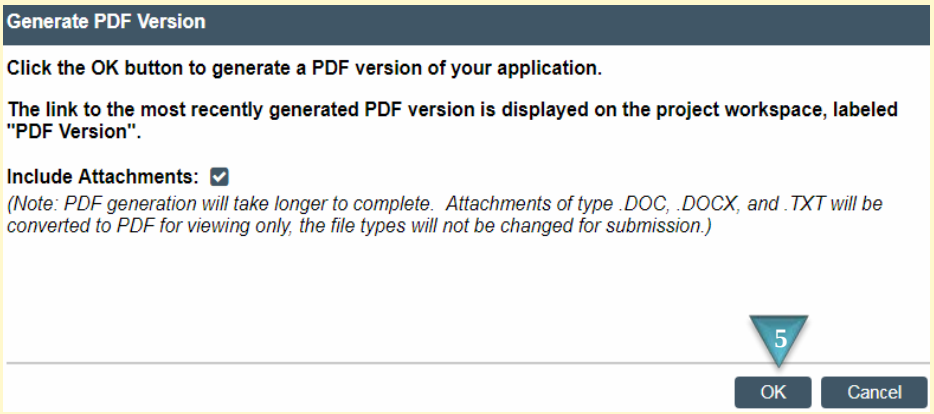
6. Verify that the PI Certification indicator is Yes on the Funding proposal Workspace.

Creating a PDF of a Grants.Gov Application









Where to start?

1. Log in and access your proposal workspace via the MyFunding tab.

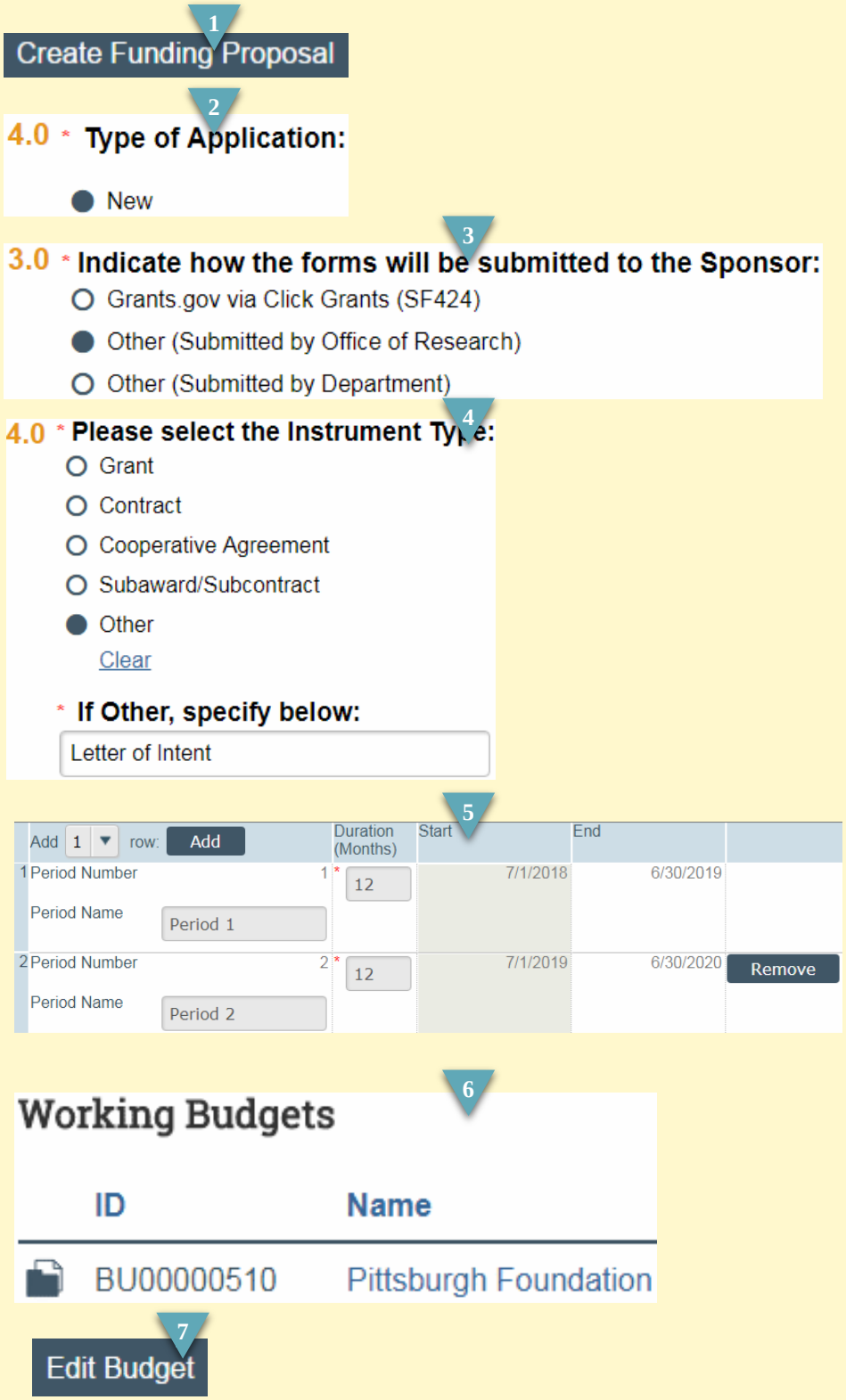
How do I create a PDF of a Grants.Gov application?

2. In the funding proposal workspace click the *SF424 Summary* tab.
3. Click on the SF424 Link.
4. In the SF424 Workspace click *Generate PDF Version*
5. Indicate if attachments should be included and Click OK.
6. In the SF424 Workspace Click *View*.

PDF Notes

7. Please be advised, NIH doesn't include some forms and attachments in the generated PDF; such as the Assignment Request Form and Cover Letter attachment. They are maintained separate from the assembled application image.

Processing a Letter of Intent, Pre-Application, Pre-Proposal, or White Paper

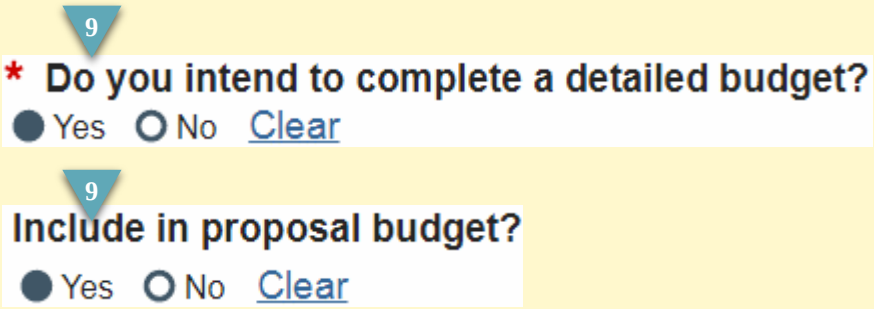


Where to start?

1. Click *Create Funding Proposal*. Complete the Funding Proposal SmartForms noting the information below.

How do I process my submission?

2. On the Proposal Description & Contacts SmartForm select *New* in question 4.
3. In General Proposal Information choose how the pre-proposal information will be submitted.
4. Select *Other* as the Instrument Type. In the text box specify *Letter of Intent* or *Pre-Application*.
5. On the Budget Periods SmartForm, if a budget is required by the sponsor, indicate the number of periods in the budget. If a budget is not required, remove all budget periods except one (the solution requires at least 1 budget period in every funding proposal).
6. Finish the Funding Proposal and enter the Budget Workspace.
7. Click Edit Budget.
8. If the Sponsor requires a budget complete the SmartForms as required for School and Department review.



9. If the Pre-Application does not require a budget, click "Edit Budget", and select the following options in the Budget smart form:

a. Select "Yes" to include a detailed budget

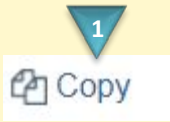
b. Select "Yes" to include the budget in the funding proposal (the system requires at least one budget to be included) This budget however will be all zeros.

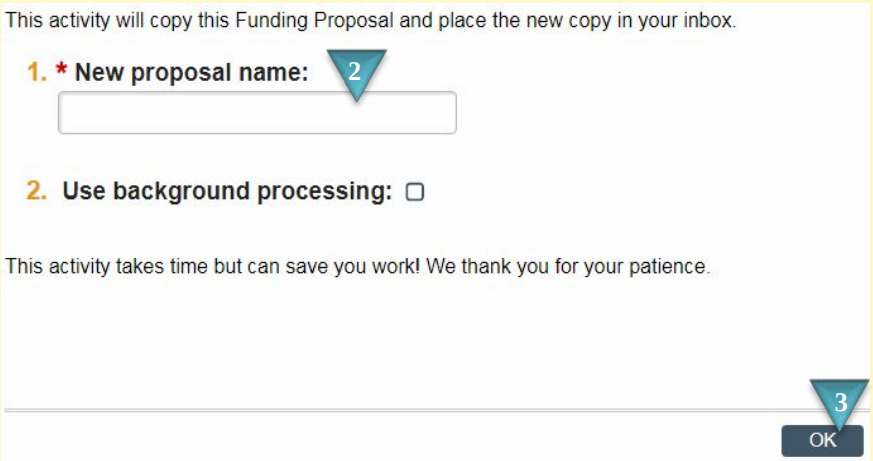
c. The budget grids (Personnel and General Costs) can be left with zeros, and the budget smart forms should then be saved.

How do I complete my submission?

10. The remainder of the funding proposal and routing should follow the standard submission process.

Copying a Funding Proposal





Where to start?

1. Click the *Copy* activity in your Funding proposal Workspace.

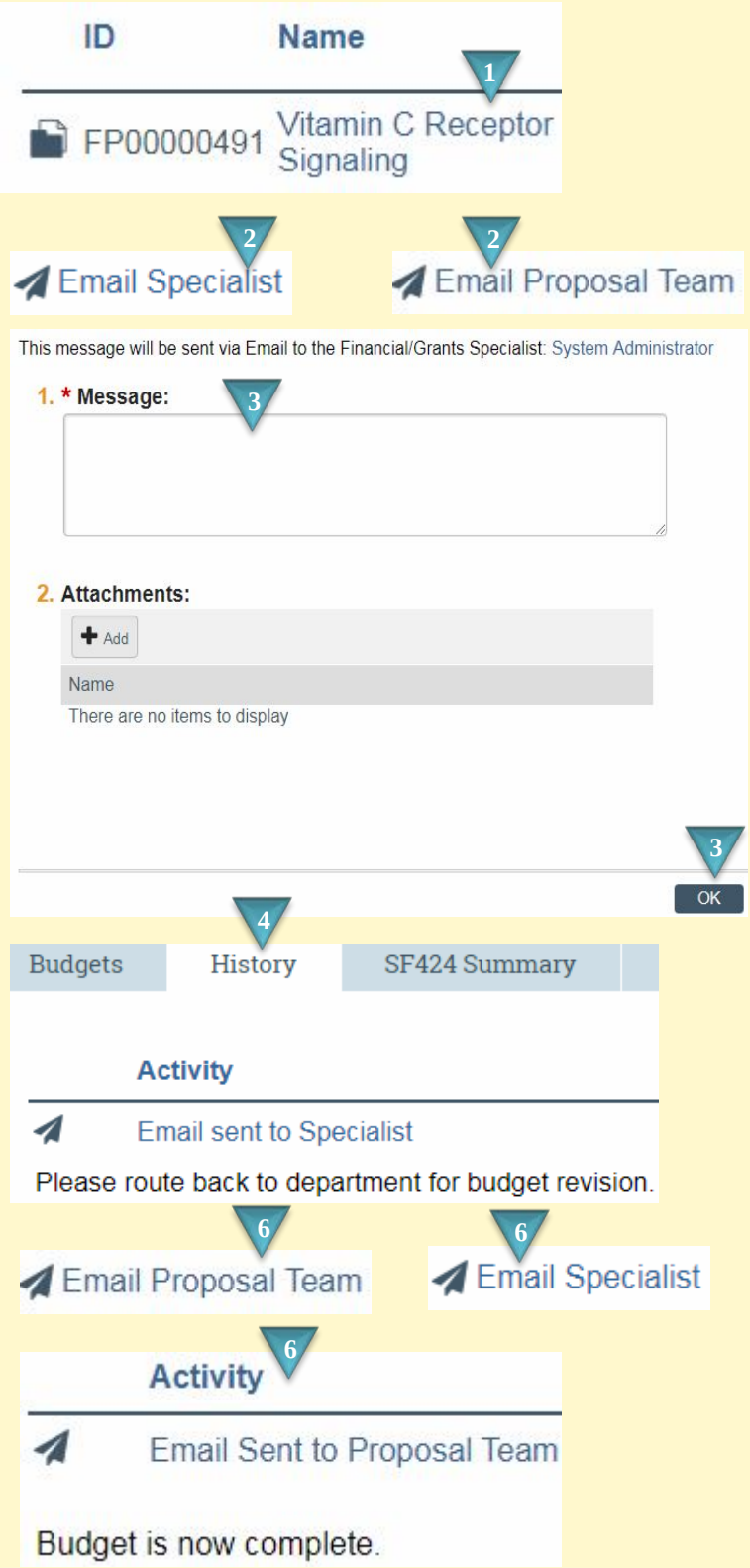
How do I copy my Funding Proposal?

2. Enter a name for your new Funding proposal.
3. Click *OK*

What's Next?

4. When processing is complete the new Funding Proposal can be found by clicking the My Funding tab.

Email Specialist and Proposal Team



Where to start?

1. After logging in access your funding proposal.

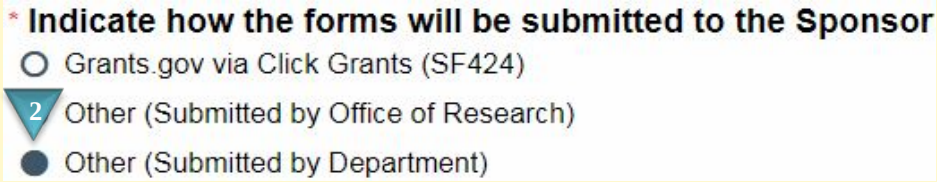
How do I Email the Specialist or Proposal Team?

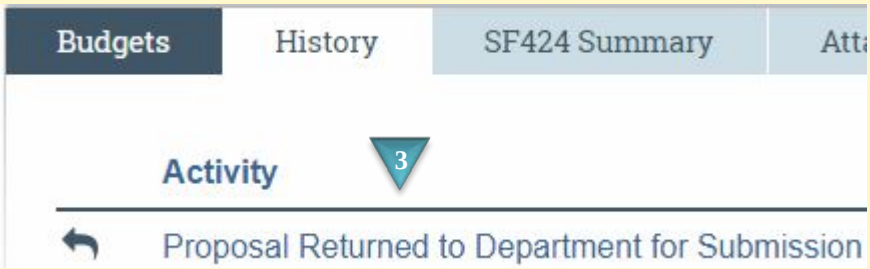
2. In the funding proposal workspace, in the left hand toolbar, click the *Email Specialist* activity (to email the Office of Research) or *Email Proposal Team* activity (to email the PI, Department Administrators, and those given proposal access.)
3. Compose the Message and click *OK*.

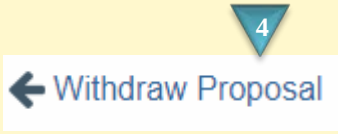
What's Next?

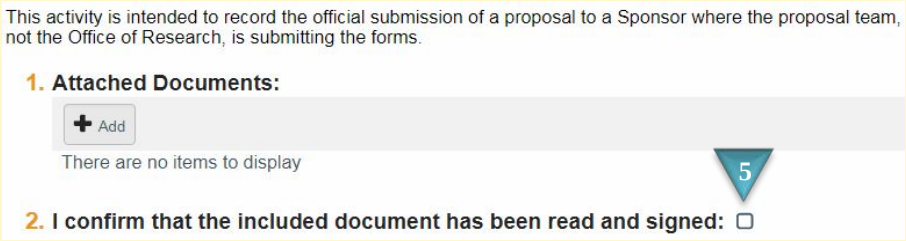
4. Your message will appear in the History tab of the workspace.
5. When a message is received through the Email Specialist or Email Proposal Team activity the sender displayed will be peris@pitt.edu.
6. When responding to a communication please do so through MyFunding. Click the *Email Specialist* or *Email Proposal Team* activity in the left hand toolbar. The message will be tracked in the History tab.

Updating an Application when Submitted by Department









Where to start?

1. After logging in access your funding proposal.
2. You can confirm in the Funding Proposal that Other (Submitted by Department) was selected on the General Proposal Information SmartForm.

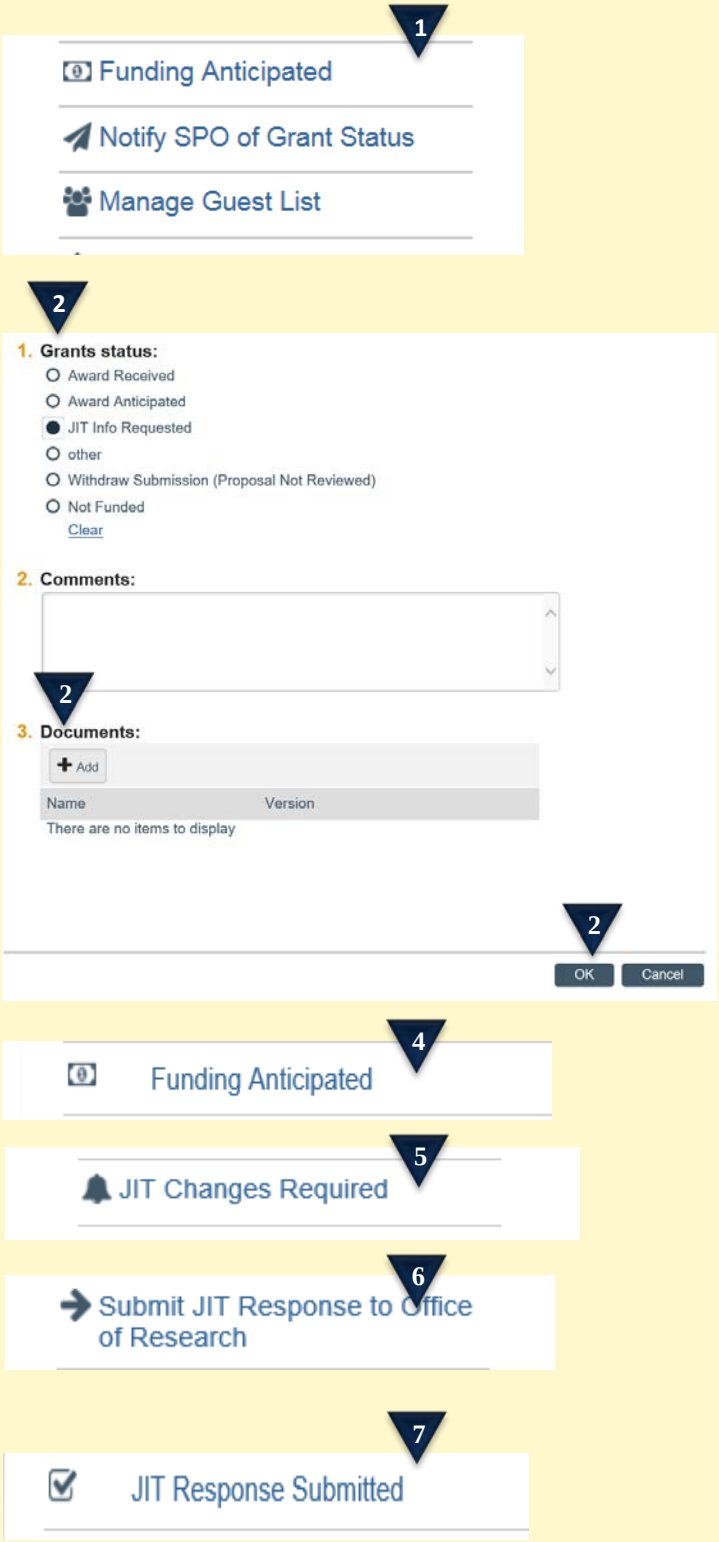
How do I update the application?

3. When proposal review is completed by the Office of Research a notification will be received. The History tab will indicate that the "Proposal Returned to Department for Submission" activity has been executed. The status will be Pending Department Submission.
4. If your proposal has been submitted click the *Submit To Non-Grants.Gov Sponsor* activity in the left sidebar. If your proposal will not be submitted select *Withdraw Proposal*. If the *Withdraw Proposal* activity is not available, you can select *Email Proposal Team* and request to have this activity completed.
5. If the proposal has been submitted attach a copy of the proposal. Check the confirmation and click *OK*.

What's Next?

6. The History tab will indicate that the proposal has been submitted or withdrawn and the status will update.

How to Process a Just-in-Time (JIT)

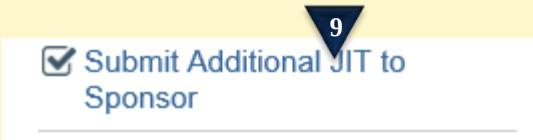


Where to Start?

1. When a JIT request is received from the sponsor regarding a funding proposal, the department will notify the Office of Research by executing the *Notify SPO of Grants Status* activity in MyFunding.

How do I update the application?

2. The department will indicate JIT Info Requested as the Grant Status, attach the documents received for the JIT request from the sponsor, and click OK to submit to the Office of Research.
3. The state of the funding proposal will change to OR Status Confirmation. A notification will be sent to the Specialist.
4. If no changes are required, the Specialist will execute the *Funding Anticipated* activity which indicates that the JIT has been submitted to the sponsor.
5. If changes are required, the Specialist will execute the *JIT Changes Required* activity.
6. After the requested changes are completed by the department, the JIT is returned to the Specialist by executing the *Submit JIT Response to Office of Research* activity.
7. After the Specialist submits the JIT, the Specialist will execute the *JIT Response Submitted* activity.

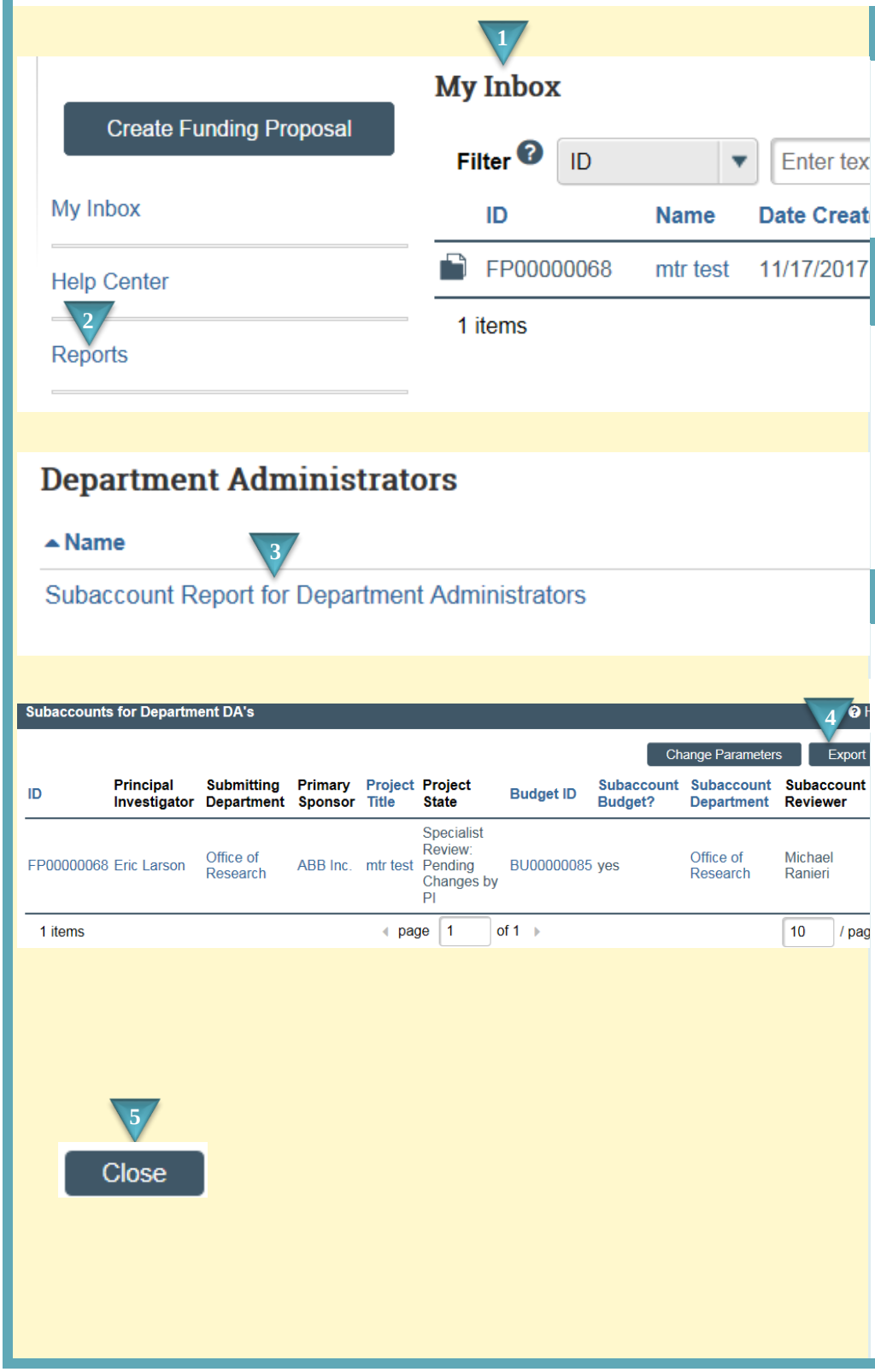


8. This is the final step in the process and this activity will change the funding proposal state to Pending Sponsor Review/Award Anticipated.

How do I revise a JIT?

9. If a revised JIT is required after submission to the sponsor, the Specialist will execute the *Submit Additional JIT to Sponsor* activity. This activity can be used as many times as necessary.

Generating a Subaccount Report



Where to start?

1. Department Administrators can generate a report to view subaccounts associated with proposals. To start, navigate to the *My Inbox* tab.

How do I run the Subaccount report?

2. Click on the *Reports* link
3. Click on the *Subaccount Report for Department Administrators* link to generate the report
4. If desired, click on *Export* to export the results to Excel.

What's Next?

5. Click *Close* to exit.

The MyFunding Module Frequently Asked Questions (FAQs)

Log-in

1. Can I access the PERIS™ solution, MyFunding module, via my.pitt.edu?

   Yes, the PERIS™ solution is listed in the right-hand column of the Pitt Passport homepage. You can directly access the PERIS™ solution at www.peris.pitt.edu.

2. How can I find my login and password for the PERIS™ solution?

   The login and password are your Pitt credentials (your email address and password). Your University of Pittsburgh computing account password can be reset here.

Funding Proposal

3. Can I generate a PDF or printer version of an application in the solution?

   Yes, for proposals submitted Grants.gov via Click Grants (SF424) there is an option to "Generate a PDF" of the Grant Application on the left-hand side in the SF424 Workspace.

   For all submissions, you can select "Printer Version" on the main funding proposal workspace to generate a printer version of the information entered into the funding proposal.

4. Can I create a funding proposal in the MyFunding module if it is not a federal grant? For example, a proposal to a foundation, a corporate sponsor or federal contract?

   Yes, you can "Create a Funding Proposal" by selecting either "Other (Submitted by Office of Research)" or "Other (Submitted by Department)" on the General Proposal Information smart form in your funding proposal. The MyFunding module replaces the 0136 stock forms.

5. What type of proposals are considered "System-to-System"?

   A system-to-system proposal is one that is completed in the MyFunding module and submitted through Grants.gov to the sponsor. In a system-to-system proposal, no work is performed outside of the solution. An example of a system-to-system proposal would be an R01 to the National Institutes of Health (NIH).

6. What type of proposals are considered for "Other (Submitted by Office of Research)" or "Other (Submitted by Department)"?

   "Other (Submitted by Office of Research)" or "Other (Submitted by Department)" submissions are considered to be non-system-to-system proposal submissions. Proposals submitted Grants.gov via Click Grants (SF424) are considered system-to-system submissions.

   An example of an "Other (Submitted by Office of Research)" would be a National Science Foundation (NSF) proposal, an American Heart Association proposal, etc., which the Office of Research personnel completes the final submission in the sponsor's system.

   An example of an "Other (Submitted by Department)" proposal would be a proposal where the University would be a subrecipient and receive a subaward, which the department personnel complete the final submission to the sponsor.

The MyFunding Module Frequently Asked Questions (FAQs)

7. How many people can you grant access to for "edit" and "view" rights within a funding proposal?

   There is no limit on how many people can be added for "edit" and "view" rights.

   Personnel with Pitt credentials will be able to view or edit funding proposals in The MyFunding module. If you are a UPMC employee and need a sponsored account you can find more information here.

8. Who starts the funding proposal?

   Either a department administrator or principal investigator can start a funding proposal, however, others can be granted access to the funding proposal with either "edit" rights or "view only" rights by adding them within the funding proposal on the "Proposal Description & Contacts" smart form

9. What sponsor level detail should we enter into the MyFunding module? For example, if I know the Institute and Center at the NIH, should I select NIH/NIDDK or just National Institutes of Health?

   If you have the information on the specific institute or center, you should select that as your sponsor. This level of detail will assist with reporting for both departments and the institution.

10. What if my sponsor is not listed in the solution?

    To enter a sponsor that is not listed in the solution, enter the sponsor name into the free text box (this is located under the statement "If Sponsor does not appear in list, enter name here"). The solution will then automatically add "TBD" as the Direct Sponsor. The PERIS™ team will then add this sponsor to the list of sponsors in the MyFunding module.

11. Can two people work on a proposal at the same time?

    Yes, two people can work on a proposal at the same time, however, both cannot edit the same smart form at the same time. If more than one person attempts to work on the same smart form simultaneously, it will allow one to edit, and allow the other person to have "read only" access to the smart form.

12. How do I prepare a Fellowship proposal in the MyFunding module?

    You can prepare a Fellowship proposal in the same manner as you prepare other types of proposals. However, you will need to enter the tuition, fees and stipend as a general cost and not as personnel costs.

13. Can we only add people to funding proposals that are part of our department?

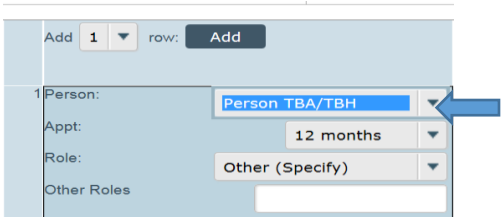
    No, everyone who is listed as an employee (faculty, staff and students) are available to be selected within the MyFunding module. However, some individuals (such as students) may not be active, because they may not be currently involved in research. If someone is not listed or active, please contact the PERIS™ team at perisproject@pitt.edu.

14. If my faculty member is on a study section and receives additional time for proposal submission, what due date would be listed in the funding proposal?

    The solution imports the Funding Opportunity Announcement (FOA), therefore, it will automatically enter the standard FOA due date. However, you can include a comment on the Submission Dates smart form to notify the Office of Research that the principal investigator is on a study section and has rolling submission privileges.

15. Do I add the to-be-determined (TBD) personnel to the "Additional Personnel" section of my funding proposal?

    No, TBD personnel are added on the "Personnel Cost" section of the budget by adding a row to the budget and selecting TBA/TBH in the drop-down list.



16. Will the non-institutional personnel entered into the funding proposal populate onto the SF424?

    If the non-institutional personnel are marked as "Senior/Key Personnel" or "Other Significant Contributor" they will populate onto the SF424.

17. What document formats can I upload to the solution?

    PDF documents should be used to prevent errors in system-to-system proposal applications. Other file types can be uploaded; however, it is not recommended to ensure proper formatting in accordance with sponsor proposal preparation guidelines.

18. Can I add or remove personnel from the application mid-way through preparing the funding proposal?

    Yes, you can add or remove personnel from the funding proposal while it is in a draft state.

19. Can I grant someone access to a proposal after it has been submitted through the MyFunding module?

    No, however, the PERIS™ team can grant access by emailing perisproject@pitt.edu for assistance.

20. How do I attach a document to my proposal?

    There are various prompts throughout the funding proposal and Budget to add attachments. The "Add Attachments" activity is located on the left-hand side of the main funding proposal Workspace and is preferred location for adding documents that are not part of the Research Plan component of the SF424.

In addition to the “Add Attachments” activity, the option to add attachments is also available when you “Submit for Department Review”, and “Submit for Specialist Review”.

21. Does the “Clarification Requested” email notification go back to the last reviewer?

    Yes, except for “Specialist Clarifications Requested”. The Specialist, your Office of Research contact, has the ability to select who to send the clarification request to for information or corrections.

22. If the IP Management Plan is marked “no”, will that prevent my proposal from being routed?

    No, this will not stop the proposal from being routed, but if the proposal is federal, the Office of Research will be unable to submit until the IP Management Plan has been completed.

23. What documents are required to “Submit Proposal Documents” in a non-system-to-system proposal?

    Any documents relevant to the review of the proposal, for example, documents that require institutional endorsement and RFA. However, you are not required to include documents from other electronic Research Administration (eRA) systems, such as copy of the Fastlane proposal. The final copy of the proposal will be added by the Office of Research Specialist once the proposal has been submitted. If you are processing a proposal that requires the department to send the proposal to the sponsor, the Office of Research Specialist will return the documents required by the sponsor to the department administrator through the MyFunding module. Documents can be found in the “Attachments” tab of the funding proposal workspace.

24. What does the “Disapprove” feature do in the MyFunding module?

    The “Disapprove” feature permanently withdraws the proposal and stops it from moving forward or being further worked on and places the proposal in a “withdrawn state”.

    Department and school reviewers should only use this feature if the proposal should not move forward. If a proposal has been accidentally “Disapproved” the “Copy” feature can be used to create another identical funding proposal.

25. Can a copy of an application be made in the MyFunding module?

    Yes, a “copy” feature is available in the MyFunding module, located on the main funding proposal workspace on the left-hand side of the tool bar. When a copy of a proposal is created the attachments are also copied into the new funding proposal.

26. Does the “Jump-to” function in the MyFunding module save my work?

    No, you should “Save” before you utilize the “Jump-to” feature.

27. If I answer “yes” to a compliance question, such as “yes” to human subjects, will I be required to upload the approval?

    No, you will not be required to upload the approval at the proposal stage, however, you will be required to upload these documents for award activation.

If you answer "yes" to use of the RBL, you will be required to upload the approval at the time of proposal since this approval is required for submission to sponsor.

28. Can you delete a record?

No, if you decide not to submit the funding proposal, you can mark it as withdrawn. Funding proposals cannot be deleted as the information in the MyFunding module is now considered the institutional file of record.

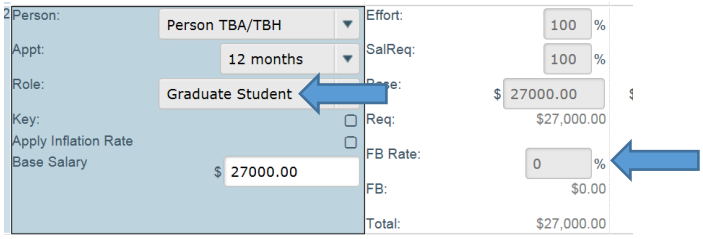
Budget

29. Are the base salaries pre-populated in the funding proposal?

No, the base salaries must be entered manually in to the budget grid of your proposal.

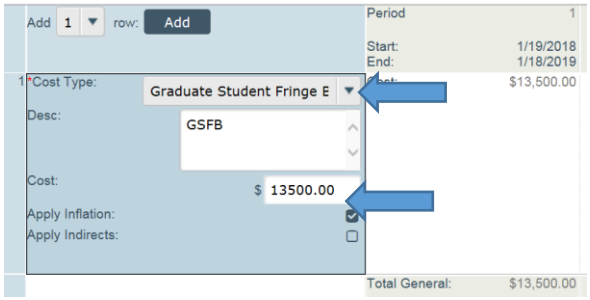
30. How do I include graduate student fringe benefits (GSFB)?

Including GSFB is a multi-step process:
The graduate student salary should be entered into the Personnel Grid with the fringe benefit rate listed as 0%. (See below)



On the next budget grid "General Costs", select from the drop-down menu the Cost Type "Graduate Student Fringe Benefit Cost".

Subsequently, add the dollar amount for the fringe benefits. The cost will be automatically excluded from the MTDC, based on the selection of Graduate Student Fringe Benefit as the Cost Type. (See below)

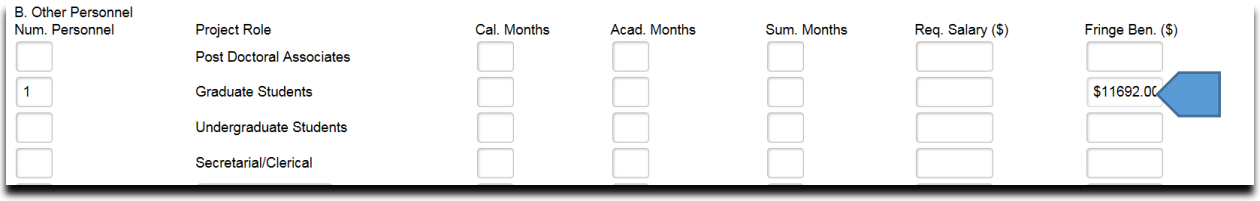


31. Where should Graduate Student Fringe Benefits be Listed on the SF-424 in MyFunding?

    Since the University of Pittsburgh's Federally Negotiated Rate Agreement excludes Graduate Student Fringe Benefits (GSFB) from the application of Indirect Costs, the GSFB must be listed as a General Cost when developing a budget in the MyFunding module to ensure that Indirect Costs are not applied to the GSFB.

    Once the SF-424 is subsequently generated, the GSFB costs should be manually moved from the Other Direct Costs section (Section F of the SF-424)

    to the Other Personnel section (Section B of the SF-424) in order to be consistent with the University of Pittsburgh's Financial Guideline on Direct Charging Practices.



32. Do I need to include a detailed description in the budget for each item entered?

    No, you can enter a basic description for the cost of the item into the budget. The only required description is for equipment.

33. What is considered a standard Indirect Cost Rate?

    Standard Indirect Cost Rates are those listed within the current Rate Agreement issued by the University annually.

34. How do I incorporate the Subaward R&R budget?

    The Research & Related Subaward Budget (R&R Budget) can be imported into the SF424 Workspace by selecting the activity "Import Subaward" located on the left-hand side of the tool bar.

35. How does the solution handle budget years that are over the modular amount?

For budget years that are over the modular amount, the solution will NOT roll-down to the modular amount and will map the dollar amount in the detailed budget into the SF424. In this instance, the proper module will need entered directly onto the SF424 to prevent an overage being submitted within the proposal application.

36. If my budget contains some on-campus activities and some off-campus activities, what do I do?

    For funding proposals that require multiple budgets, two separate budgets should be created by using the "Create Additional Budget" activity on the left-hand side of the tool bar on the main funding proposal workspace. The first would be for on-campus activities and costs, and the second for off-campus activities and costs. If both budgets are required for inclusion in the proposal indicate "yes" to each for the question "Include in proposal budget?"

37. Can I build multiple budgets in the MyFunding module?

    Yes, you can build as many budgets as you would like and subsequently select which budgets to include in the proposal prior to submission.

38. How do I enter split fringe benefit rates?

    Do not enter split benefit rates. Use the rate in effect at the time of proposal.

39. How many decimal points is allowed for effort in the Personnel Costs section of the budget?

    Two (2) decimal places are allowed for effort in the Personnel Costs section of the budget.

40. Is a detailed budget required for a modular budget submission?

    No, when a modular budget is proposed a detailed budget is not required.

41. Does the MyFunding module allow non-budget edit access?

    No, if an individual has edit access, then he/she can access and edit the entire funding proposal.

42. For personnel above the salary cap, how will this be handled in the budget?

    When project personnel salaries exceed the salary cap, a separate cost sharing budget can be created. When answering "yes" to the below question and indicating "salary cap", a separate cost-sharing budget will be automatically created by the solution (See below). The cost-sharing budget can then be completed to include the cost-sharing categories and amounts.

Subaccounts

43. Can I route a proposal without an approved subaccount budget?

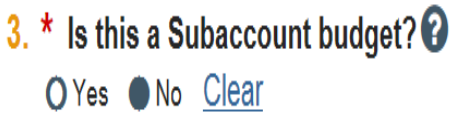
    All subaccount budgets must be approved before routing begins. If a funding proposal is routed prior to the approvals being obtained there will be no option for the subaccount department to approve the subaccount budget.

44. Will the subaccounts only see their subaccount budget, or will they see the entire budget?

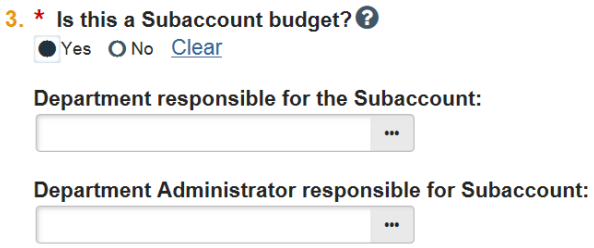
    The subaccount departments will only see the budget that you as the master department have routed to them for approval.

45. How do I route a subaccount budget in the MyFunding module?

    To route a subaccount budget, you must create an additional budget by selecting "Create Additional Budget" in the funding proposal Workspace. When creating the budget, indicate in Question 3 that the budget is a subaccount budget.



    The ability to select the department and department administrator for the subaccount will appear.



    Select the subaccount department and the administrator responsible for approving the sub account. Once complete, select the activity "Send for Subaccount Review" on the left hand-side of the subaccount workspace.

46. Does the MyFunding module create modular budgets with the subaccount budgets included?

    No, the solution does not have the capability to create modular budgets from multiple budgets. When a modular budget is being submitted for the overall proposal, the subaccount budget feature should be used as a routing tool to obtain approval for the subaccount, but that budget should not be included in the proposal.

Instead, one cumulative budget should be created that includes all costs for the project. That budget should be included in the proposal. The solution will use the cumulative budget to create the modules.

Principal Investigator (PI) and Principal Investigator Certification

47. Can the Principal Investigator upload their own documents into the MyFunding module?

    Yes, the principal investigator has access to all of their proposals and can upload the documents.

48. If I have a new principal investigator coming on board, how can I add this faculty member to the MyFunding module?

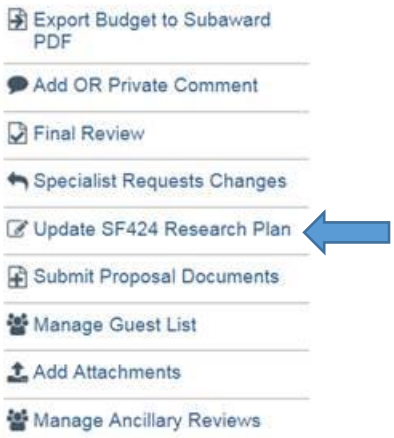
    The PERIS™ portal receives a nightly feed from Human Resources that updates all new personnel. However, if you do not see someone, please email the PERIS™ team at perisproject@pitt.edu.

Principal Investigator Certification

49. How is a Principal Investigator Certification (PI Certification) request initiated?

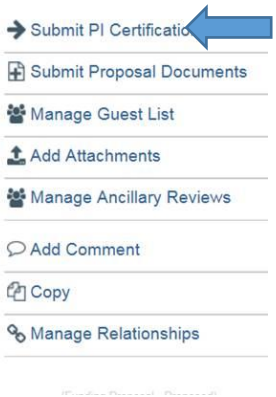
    To initiate the Principal Investigator Certification in a funding proposal, the science must first be complete. There are two ways to initiate the Principal Investigator Certification:

    In a system-to-system proposal once the science is ready, click on the "Update SF424 Research Plan" activity (see below):

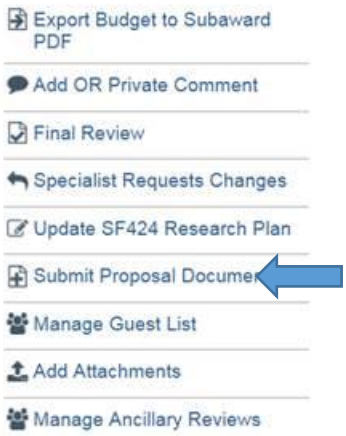


    This is where the scientific documents will be uploaded. Once the scientific documents are uploaded mark Question 14 to "yes" (see below):

This will initiate the Principal Investigator Certification notification to be sent to the Principal Investigator. Once the notification is received, the Principal Investigator should follow the link provided in the notification to complete the Principal Investigator Certification (see below):

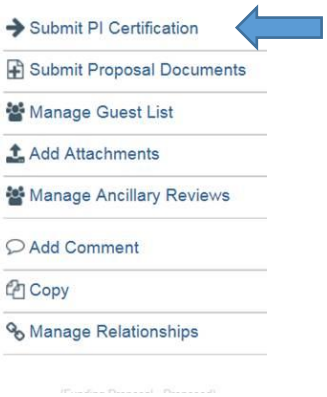


In a non-system-to-system proposal "once the science is ready, click on the "Update SF424 Research Plan" activity (see below):



This is where the scientific documents will be uploaded. Once the scientific documents are uploaded mark Question 2 to "yes" (see below):

This will initiate the Principal Investigator Certification Notification to be sent to the Principal Investigator. Once the notification is received, the Principal Investigator should follow the link provided into the Notification to complete the Principal Investigator Certification (see below):



50. Can I submit my proposal to the Office of Research without the Principal Investigator Certification being completed?

    Yes, you can route the proposal to the Office of Research for review without the Principal Investigator Certification, however, the proposal cannot be submitted to the sponsor without Principal Investigator Certification.

51. Principal Investigator Certification, is this required for all proposals?

    Yes, Principal Investigator Certification is required for ALL proposals to ensure the proposal is accurate and ready for submission.

Submissions through ASSIST

52. Do I still need to complete my proposal applications in ASSIST?

    ASSIST is available as an option to complete U, P, or SPORE grants. When completing one of these types of proposals in ASSIST, a funding proposal must still be completed in the MyFunding module. This type of submission would be considered non-system-to-system and entered into the MyFunding module as "Other Submitted by Office of Research" within the funding proposal smart form.

Submissions through FASTLANE

53. Can I still use FastLane to submit my NSF proposals?

    Yes, NSF proposals would be submitted through Fastlane and the MyFunding module, as an "Other (Submitted by Office of Research)" funding proposal type.

Internal Funding Submissions

54. Will the MyFunding module be used to process CRDF proposals?

    No, the MyFunding module does not support internal funding opportunities.

Progress Reports

55. Can I submit a progress report through the MyFunding module?

No, you should continue to submit your progress reports according to the current process. Progress reports will be addressed in Phase II of the PERIS™ project.

Department of Defense (DOD) Submissions

56. Do proposals get submitted through eBRAP (DoD's eRA system)?

    All proposals that use Grants.gov can be submitted through the MyFunding module. If a funding opportunity is not supported by the MyFunding module.

Notifications

57. Does the Principal Investigator receive a notification when a proposal is started?

    No, the Principal Investigator does not receive a notification when a proposal is started.

58. Who receives the notification that a proposal was submitted to the sponsor?

    The Principal Investigator, Department Administrator, and all personnel listed with edit rights in the funding proposal will receive notification that a proposal was submitted to the sponsor.

59. Who receives the notification that a clarification is requested on a proposal?

    A clarification requested notification is received by both the Department Administrator and the Principal Investigator when clarifications are requested on a proposal.

60. Are notifications generated for proposals submitted by the department?

    A notification is generated to both the PI and the department administrator when the activity "Proposal Returned to Department for Submission" is completed by the Specialist in the Office of Research.