

RAMS-SPOT Getting Started Guide – Creating an SF424 Package

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Part 1: Creating the Funding Proposal and Budget in RAMS-SPOT

- 1) First, create a **funding proposal** in RAMS-SPOT

SF 424 - Test for Mapping

FP00000063

Current State

In Development

Edit Funding Proposal

Printer Version

View Differences

View SmartForm Progress

My Current Actions

PROPOSAL INFORMATION

PD/PI: Dr. Q

Fiscally Administering Unit: Medicine

Sponsor: National Institutes of Health

OSP Reviewer:

Team: Green

BUDGET

Starting Date:

Project End:

Total Sponsor:

Working Budgets

Name	SmartForm	State
Primary Budget	[Edit]	In Development

- 2) On the *Sponsor Information Smart Form*, the PI/Study Staff will want to select a **government sponsor** such as NIH.

Sponsor Information

1. * Select Direct Sponsor or TBD if not listed:

National Institutes of Health Select... Clear

If Direct Sponsor does not appear in list, enter name here:

Sponsor Type: (updated at save)

Government Sponsor

- 3) On the *General Proposal Smart Form*, the PI/Study Staff will answer #4, "Electronic via grants.gov."

4. * Indicate how the forms proposal will be submitted to the Sponsor:

☒ Electronic via grants.gov

☐ Other

Clear

- 4) On the *Federal Grant Information Smart Form*, the PI/Study Staff will 1) enter the **Opportunity ID** and then 2) click on **Find**. 3) This will prompt RAMS-SPOT to bring in the specific **forms set** and **instructions** for that particular Opportunity ID.

Federal Grant Information

1. Enter an opportunity ID below, then click Find. From the returned, select an opportunity, then click Continue.

* **Opportunity ID (PA or RFA Number):** PA-13-302 **Find...**

CFDA Number:

Competition ID: FORMS-C

Opportunity Id	Opportunity Title	Opening Date	Closing Date	CFDA Number	Competition ID	Instructions
PA-13-302	Research Project Grant (Parent R01)	8/7/2013	9/7/2016		FORMS-C	

- 5) Next, the PI/Study Staff should enter the **Primary Budget** and any additional budget information in RAMS-SPOT.

Current State

In Development

Edit Funding Proposal

Printer Version

View Differences

View SmartForm Progress

My Current Actions

Inactivate Proposal

PROPOSAL INFORMATION

PD/PI: Dr. Q

Fiscally Administering Unit: Medicine

Sponsor: National Institutes of Health

OSP Reviewer:

Team: Green

Working Budgets

Name	SmartForm
Primary Budget	[Edit]

Part 2: Running the Create-Update SF424 Process

- 1) After entering the funding proposal and relevant budget information in RAMS-SPOT, the PI/Study Staff should run the **Create-Update SF424** process by clicking on **Create-Update SF424** under **My Current Actions**.

My Current Actions

Inactivate Proposal

Route for Approval

Create-Update SF424

Log Public Comment

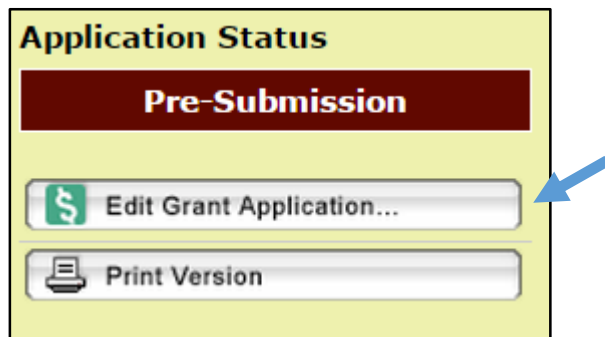
- 2) When initiating the **Create-Update SF424** process, the PI/Study Staff will need to check all **mandatory** and **optional forms**. Note: A **budget** form is not automatically selected. All **budget** forms are listed as optional but, at least one **budget**, must be included in the SF424 package. At this point, the PI/Study Staff should select a **budget(s)** by entering a checkmark(s) next to the relevant selection(s).

<input type="checkbox"/> Action
<input checked="" type="checkbox"/> Research & Related Senior/Key Person Profile (Expanded) V2.0
<input checked="" type="checkbox"/> Research & Related Project/Performance Site Location(s) V2.0
<input checked="" type="checkbox"/> Research & Related Other Project Information V1.3
<input checked="" type="checkbox"/> PHS398 Cover Page Supplement V2.0
<input checked="" type="checkbox"/> SF424 (R&R) V2.0
<input checked="" type="checkbox"/> PHS 398 Research Plan V2.0
<input checked="" type="checkbox"/> Research & Related Budget V1.3
<input type="checkbox"/> Research & Related Subaward Budget Attachment(s) Form 5 YR 30 ATT V1.3
<input type="checkbox"/> PHS 398 Modular Budget V1.2
<input type="checkbox"/> PHS 398 Cumulative Inclusion Enrollment Report V1.0
<input type="checkbox"/> Planned Enrollment Report V1.0

- 3) The **link** to the SF424 will now be available in the middle of the main workspace. The PI/Study Staff should click on the **link** to access and complete the SF424.


Current State	PROPOSAL INFORMATION
In Development	PD/PI: Dr. Q
Edit Funding Proposal	Fiscally Administering Unit: Medicine
Printer Version	Sponsor: National Institutes o
View Differences	OSP Reviewer:
View SmartForm Progress	Team: Green
My Current Actions	Working Budgets
Inactivate Proposal	<input checked="" type="checkbox"/> Name SmartForm
Route for Approval	Primary Budget [Edit]
Create-Update SF424	SF424 INFORMATION
Update SF424 Access	SF424 Link: SF-42400000033
Log Public Comment	SF424 Current State: Valid for Submission
(Funding Proposal - Proposed)	SF424 Tracking#: SF424 Status Updated:
	SF424 Received Date/Time: PDF Version:


- 4) Next, the PI/Study Staff will click on **Edit Grant Application**.



Application Status

Pre-Submission

 **Edit Grant Application...**

 **Print Version**

- 5) The PI/Study Staff will again select the correct **mandatory** and **optional forms**.

Application Filing Name:
SF424 - Test for Mapping

Following forms are optional, Please select any that you wish to include i

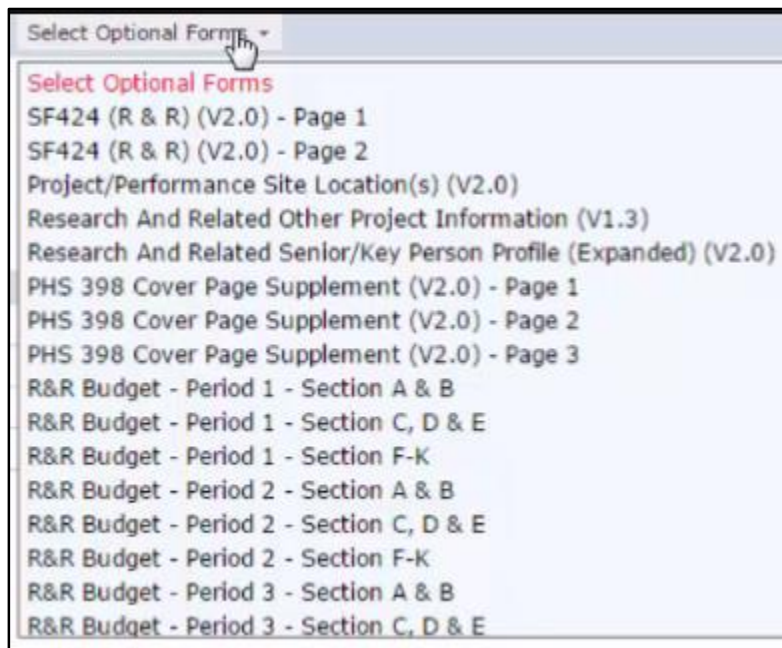
Form Name
<input checked="" type="checkbox"/> Research & Related Budget V1.3
<input type="checkbox"/> Research & Related Subaward Budget Attachment(s) Form 5 YR 30 ATT V1.3
<input type="checkbox"/> PHS 398 Modular Budget V1.2
<input type="checkbox"/> PHS 398 Cumulative Inclusion Enrollment Report V1.0
<input checked="" type="checkbox"/> Planned Enrollment Report V1.0

Following forms are required:

Form Name
Research & Related Senior/Key Person Profile (Expanded) V2.0
Research & Related Project/Performance Site Location(s) V2.0
Research & Related Other Project Information V1.3
PHS398 Cover Page Supplement V2.0
SF424 (R&R) V2.0
PHS 398 Research Plan V2.0

Part 3: Completing the SF424

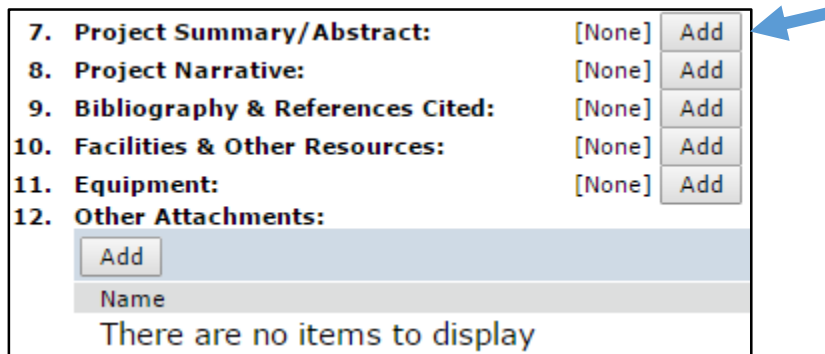
- 1) Now that the SF424 has been created. The next step is to go through the SF424 **page** by **page** and enter the necessary information. The PI/Study Staff can use the **Jump To** menu to move throughout the SF424 or click **Continue**.



A screenshot of a web application showing a dropdown menu titled "Select Optional Forms". The menu is open, displaying a list of optional forms. A mouse cursor is pointing at the dropdown arrow. The list includes:

- SF424 (R & R) (V2.0) - Page 1
- SF424 (R & R) (V2.0) - Page 2
- Project/Performance Site Location(s) (V2.0)
- Research And Related Other Project Information (V1.3)
- Research And Related Senior/Key Person Profile (Expanded) (V2.0)
- PHS 398 Cover Page Supplement (V2.0) - Page 1
- PHS 398 Cover Page Supplement (V2.0) - Page 2
- PHS 398 Cover Page Supplement (V2.0) - Page 3
- R&R Budget - Period 1 - Section A & B
- R&R Budget - Period 1 - Section C, D & E
- R&R Budget - Period 1 - Section F-K
- R&R Budget - Period 2 - Section A & B
- R&R Budget - Period 2 - Section C, D & E
- R&R Budget - Period 2 - Section F-K
- R&R Budget - Period 3 - Section A & B
- R&R Budget - Period 3 - Section C, D & E

- 2) At times, the PI/Study Staff will need to **upload** documents by clicking on **Add** and selecting the correct file.



A screenshot of a web application showing a list of sections for document uploads. Each section has an "Add" button. A blue arrow points to the "Add" button for the "7. Project Summary/Abstract:" section. The sections are:

- 7. Project Summary/Abstract: [None] Add
- 8. Project Narrative: [None] Add
- 9. Bibliography & References Cited: [None] Add
- 10. Facilities & Other Resources: [None] Add
- 11. Equipment: [None] Add
- 12. Other Attachments: [None] Add

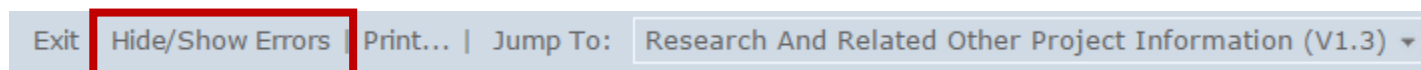
Below the list, there is an "Add" button, a "Name" input field, and the text "There are no items to display".

Part 4: Editing in RAMS-SPOT / SF424

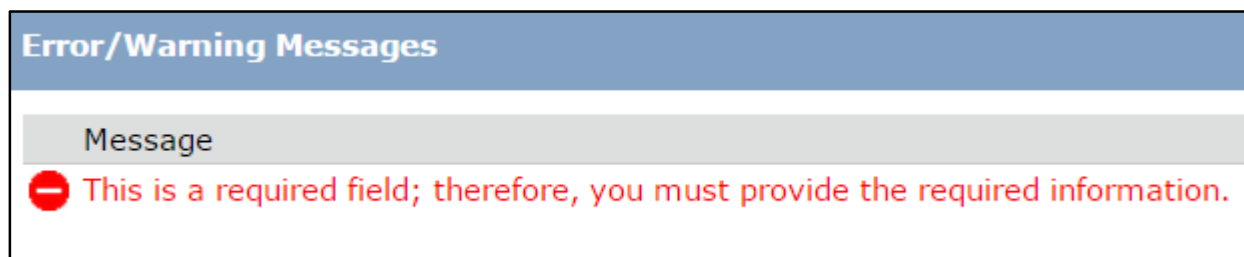
- 1) When updating the SF424, the PI/Study Staff must carefully consider the **source** of the information that they would like to edit.
- 2) If the information that they would like to **update** was originally entered in the **RAMS-SPOT funding proposal** or **budget**, then the PI/Study Staff must **update** the information on the **RAMS-SPOT funding proposal** or **budget**. Next, the PI/Study staff must **re-run** the **Create-Update SF424** process again.
- 3) If the information that the PI/Study Staff would like to **update** was entered **manually** directly on the SF424, then the PI/Study Staff may **edit** the information directly on the SF424.

Part 5: Validating and Routing for Approval

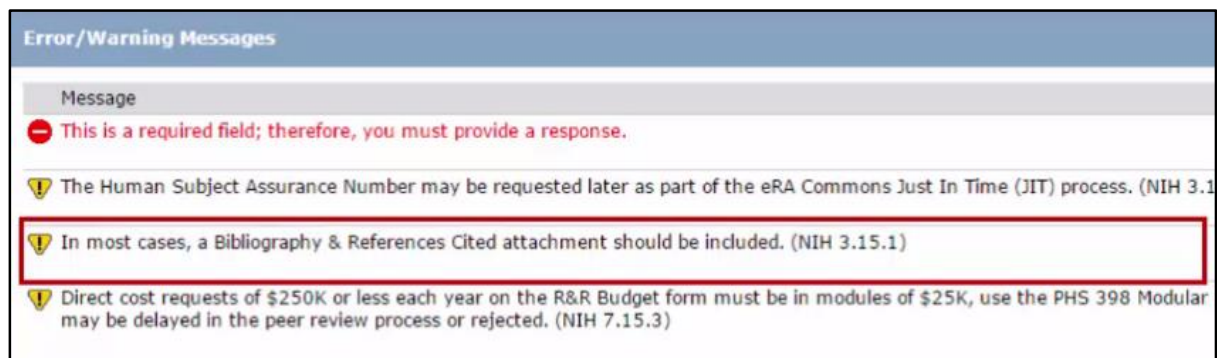
- 1) At any time, the PI/Study Staff can click **Hide/Show Errors**.



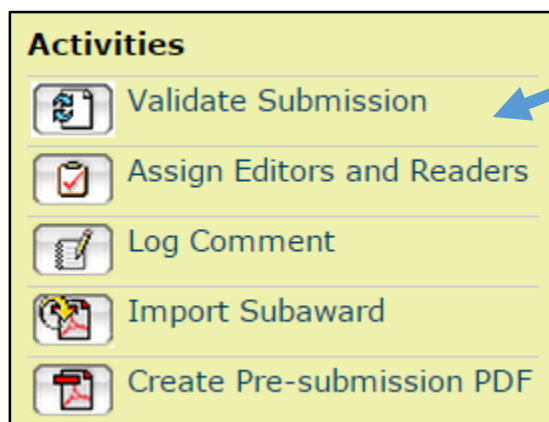
- 2) The **errors** will show in **red** and must be resolved before the Funding Proposal and SF424 can be routed for approval.



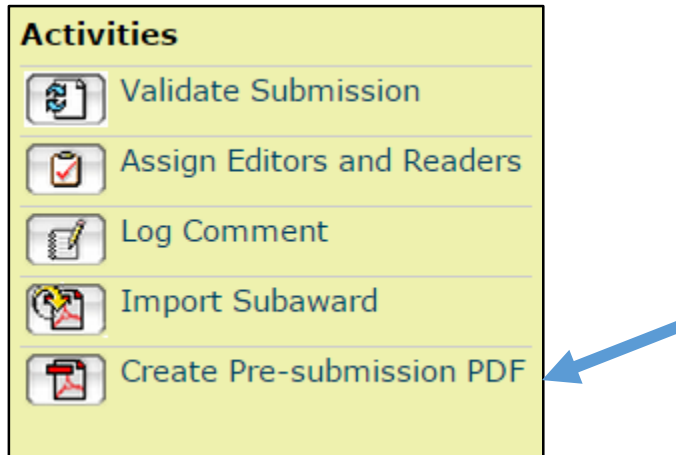
- 3) The **warnings** will be next to the **yellow caution symbol**. It is recommended for the PI/Study Staff to resolve as many warnings as possible before routing the Funding Proposal and SF424 for approval.



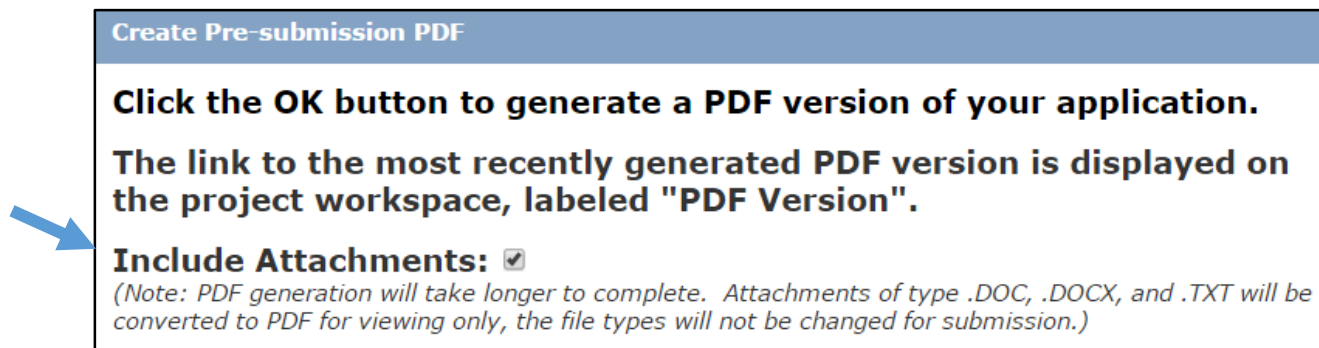
- 4) Next, the PI/Study Staff will **validate** the SF424 by clicking on **Validate Submission**.




- 5) At this time, it is recommended that the PI/Study Staff generate a **.pdf** of the SF424 to review all of the information.



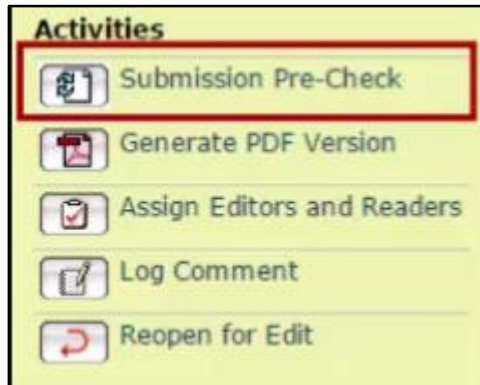
The PI/Study Staff will have the option of whether or not they would like to **include attachments** when generating the **.pdf**.



After clicking **Generate PDF Version**, there will be a **link** on the screen for the PI/Study Staff to view the **.pdf**.

Descriptive Title:	Test for Mapping 2	
Submission Type:	New	Start Date:
PDF Version:	[View]	End Date:
Tracking Number:	FOA:	
Received Date/Time:	Funding Proposal:	
Status Updated:	Date Modified:	
 Download R&R Subaward Budget forms		

- 6) The next step is to click on **Submission Pre-Check** which checks for missing information that is critical to the SF-424.



- 7) After the *submission pre-check* is complete, the next step is to **route** the proposal on to **approval** by clicking **Route for Approval**.

