Detailed below are instructions for building a Grants.gov proposal application that requires a detailed, itemized budget. Note: The forms and materials required for Grants.gov applications vary. The instructions below utilize the 424 R&R forms package. Other Grants.gov funding opportunities may use a different forms package containing additional and/or different form screens, but the instructions below will still largely apply.

Part 1: Initiating a Grants.gov S2S Application

Create a new proposal. At “Step 1 Continued,” choose “Select from Grants.Gov Opportunities,” and click “Continue to Next Step.” In the field that next appears, enter the Grants.gov Funding Opportunity Number and click “Search.” Do not uncheck the “S2S” box.

InfoEd will search its database for matching opportunities. To view an opportunity announcement result, click “SPIN” in the “Spin View” column. To select the opportunity click “Select.”

Advance through the additional questions. At “Step 7: Number of Years,” select number of budget periods.

Part 2: Completing the SF424 (R&R) Form Screen

Many fields on the SF424 (R&R) will auto populate, but yellow highlighted fields must be addressed by the user. To complete the “Person to be contacted on matters involving this application” field, click in the “First Name” field. The screen will change to reveal the “Administrative Official to be Notified if Award is Made” field. Select your assigned Sponsored Projects pre-award research administrator from the pick list and click “Set.” The selected person’s contact information will load. Click the “Back” button to return to the SF424 form screen.
Complete remaining yellow highlighted fields, click “Save” in the upper left corner of the screen, and then complete the screen by clicking the “Completed” box in the upper right corner of the screen.

**Part 3: Completing Application Specific Components**

Required application components are represented as screens on the left navigation. Requirements differ among funding opportunities, so included components will match the requirements of the funding opportunity. Some component screens require a document upload, some screens display questions and some screens require a form completion. Address the requirements of each screen, and check the “Completed” box in the upper right corner of each screen when done.

**Part 4: Adding Additional UNR Personnel (Both Named and TBD)**

The UNR principal investigator (PI) has already been added to the proposal record via the setup questions, but all additional participating UNR personnel (both key and non-key) need to be added. Access the Personnel screen via the left screen navigation.

First, add the current UNR employee participants as follows (illustration below):

1. Select as appropriate from the “Personnel Type” picklist.
2. Enter the individual’s last name in the field provided and click to select.
3. Select from the “Role” pick list.
4. Click “Add.” Participant will appear in either the “Key” or “Non-Key” screen sections.

Repeat the above process to add further named UNR personnel.
Next, add TBD individuals and named individuals who are not currently UNR employees (illustrations below):

1. Select as appropriate from the “Personnel Type” picklist.
2. Click “Create New Profile.”
3. In the New Profile screen, enter TBD in the last name field, or if a known individual, enter as much contact information as possible.
4. Set the individual’s departmental assignment by clicking “Set” (to the right of “Department” at bottom of screen).
5. The Departments screen will appear, begin entering the assigned department name in the field provided, click to select, and then click “Locate.”
6. Confirm correct department within UNR hierarchy is checked (scroll if necessary), and click “Select” in the upper right of the screen. If incorrect, locate and select the correct department (use “+” to expand a division to reveal underlying departments), and then click “Select” in the upper right of the screen.
7. The user should be back on the Departments screen with the selected department now showing in the “Department” field. Now, click “Save” in the upper right of the screen.

8. Select from the “Role” picklist.

9. Click “Add.” Participant will appear in either the “Key” or “Non-Key” screen sections.

Repeat the above process to add further personnel.

**Uploading CV and Current/Pending Support Documents for Key Personnel:** If required, upload CVs and Current/Pending Support documents for key personnel by clicking the upload icon for the corresponding individual.

When done on the Personnel screen, complete it by clicking the “Completed” box in the upper right corner of the screen.

**Part 5: Completing the UNR Budget**

Access the Budget Summary screen via the left screen navigation by clicking “Budget.”

**A. Budgeting UNR Personnel Costs:** First, budget salaries for the personnel listed. In the “Personnel” section of the screen, click the “Detail” button for the individual whose salary you wish to budget.
The Personnel Costs screen will open for that individual with three tabs showing across the top: “Detail,” “Appointments” and “Cost Sharing.” Click the “Appointments” tab.

**Configuring the Appointments Screen:** Configure the individual’s appointment type, salary and fringe as follows.

1. Set the “Appointment” information as appropriate. If selecting “OVL,” be sure to set the “Months” to four. If selecting, “ACB,” be sure to set the months to eight. In other words, the “Months” should correspond to the length of the appointment.
2. Confirm/enter the annual “Base Salary” amount. Note: The annual base salary will need to be changed if budgeting for OVL salary (should be the max amount one will earn if working all available overload days in the year). For current employees, the “Base Salary” will populate with current salary data from the UNR HR database. If not a current employee (such as a TBD) or if salary data is not available, the “Base Salary” will need to be manually entered.
3. Set the “Fringe Benefits” by selecting as appropriate from the pick list. (Choose the fringe option that corresponds to the appointment type for which you are budgeting.). The fringe amount will auto-calculated. Alternatively, one can choose “Manual Entry” from the pick list and entered the desired annual fringe amount.
4. Select an “Annual Inflation” determinant if desired. To automatically inflate salaries for each budget period, select an inflation rate from the pick list. If you wish to apply the inflation rate in the first budget period, check the box for “Apply inflation on the Primary Appointment Anniversary Date.” Leave unchecked if you wish to apply inflation on the outlying years only.
5. Click “Save” in the upper right of the screen.

**Configuring the Personnel Costs Detail Screen:** Click the “Detail” tab and budget the individual’s personnel costs as follows.

1. From the pick list, select effort method, either “Person Months” or “Effort.”
2. Corresponding with the indicated appointment type, only one column (“Calendar,” “Academic” or “Summer” will be available). Enter an effort value (person months or percent effort) for each budget period. Note: InfoEd will assume the same effort for each budget period and auto-populate future budget periods. Correct if necessary. Note: if budgeting both
“Summer” (overload) and “Academic” effort in a budget period, please consult your Sponsored Projects **pre-award research administrator for assistance**.

3. Click “Save” in the upper right of the screen, and salary and fringe will auto-calculate.
4. Close the Personnel Costs Detail screen by clicking the “Close” in the upper right. You will return to the Budget Summary screen and see the personnel costs listed.

Repeat the above process for all participating UNR personnel.

**B. Budgeting UNR Non-Personnel Costs:** Next, budget all non-personnel costs. Locate the “Non-Personnel” section of the Budget Summary screen (two-thirds of the way down the screen), and enter non-personnel costs as follows.

1. Click the “Add Bulk Entry” button on the far right of the Non-Personnel” section of the screen.

2. A pop-up screen will appear where up to five non-personnel cost items may be added. Enter the item description in the field provided, select from the “Budget Category” pick list (if exact budget category is not present, choose “Other Costs”) and enter the cost for each budget period. Note: InfoEd will assume the same item value for each budget period and auto-populate future budget periods with the period one value. Correct if necessary.

3. Once all item entry fields are completed, click “Add” in the upper right of the screen. You will return to the Budget Summary screen see the added costs listed.

Repeat the above process to add further non-personnel cost items.
C. Adding and Budgeting SubAwards (if applicable): Locate the “SubAwards” section of the Budget Summary screen (near bottom of screen), click “[show],” and enter subawards as follows.

1. Begin typing the subaward organization name in the field provided, and click to select. If unable to locate desired subaward institution, contact your Sponsored Projects pre-award research administrator for assistance.

2. From the pick list, choose a subaward PI from the existing database. If subaward PI does not exist in the current database, click “Add New Profile.” In the resulting “New Profile” screen, complete as many fields as you can, and click “Save” in the upper right of the screen. You will return to the “Budget Summary” screen.

3. The subaward budget may be imported (subaward must supply budget on form specified in the funding announcement) or manually entered. If importing the subaward budget, click “Import.”

   An upload window will appear. Click “Choose File” to select file to upload. Click “Upload” to upload the completed subaward budget form. InfoEd will populate the subaward budget from the uploaded budget.

   If manually entering the subaward budget, click “Add SubAward.”

   A pop-up screen will appear to configure budget periods subaward will be active. Click “Add to Period,” uncheck budget periods subaward will not be active. Then click “Save.”

   The subaward will be listed on the Budget Summary screen “Subawards” section. Click “Detail” to open the Subaward Budget Summary screen.
Add additional subaward personnel (other than the subaward PI) if necessary. Locate the “Personnel” section of the screen, and add subaward personnel just as you did earlier when adding UNR personnel to proposal.

Enter subaward personnel costs in the “Personnel” section of the Subaward Budget Summary screen. Click the “Detail” button to the left of the subaward individual for which you are budgeting. The Personnel Cost Detail screen will open. Complete the data entry fields using the subaward supplied budget information. When done, click “Save and Close” in the upper right of the screen. You will return to the Subaward Budget Summary screen and costs will show for the individual. Repeat process to budget further subaward personnel costs.

Enter subaward non-personnel costs in the “Non-Personnel” section of the Subaward Budget Summary screen, click “Add Bulk Entry,” and add subaward non-personnel costs just as you did earlier when adding UNR non-personnel costs to record.

Enter Subaward F&A in the “F&A Breakdown” section at the bottom of the subaward Budget Summary screen. For each budget period, indicate the subaward “Scheme (ex: on-campus research), enter subaward F&A rate, and enter the subaward base (direct cost on which F&A is calculated). The subaward F&A amount will auto-calculate. Click the “Save” button in the upper left corner of the screen.

Upload Subaward Justifications: Navigate to the Subaward Justifications screen via the left screen navigation, and upload any required subaward justifications.
4. Return to the main Budget Summary screen (via left screen navigation). Repeat the above processes to add additional subawards.

5. Upload subaward personnel CVs: Revisit the Personnel screen (via left screen navigation) and upload documents for the subaward personnel. Note: Uncomplete the “Personnel” screen (un-check “Complete” box in upper right of screen) to make edits.

D. **Budgeting UNR F&A:** The applicable F&A rate is set according to the program type indicated on the proposal Setup Questions screen and is auto-calculated on the itemized budget. Verify the F&A calculation at the bottom of the screen, and if correct, click the “Save” button in the upper left of the screen. To revise the F&A calculation, (as in the case of a sponsor F&A limit), follow the steps below.

1. **Manually Setting the F&A Rate:** To set a specific F&A rate, first select the F&A base from the “Base” pick list: modified total direct cost (MTDC) or total direct cost (TDC). Then, choose “Manual Entry” from the “Rate” pick list. Enter the F&A rate in the “Rate” field, and click “Apply.” F&A will now auto-calculate using the specified rate. When done, click the “Save” button in the upper left of the screen.

2. **Manually Entering F&A:** To enter the F&A base and amount for each budget item, click “Manual F&A.” For each budget item listed, enter the F&A base and amount in the boxes provided. When done, click the “Save” button in the upper left of the screen.
E. Budgeting Cost Sharing (if applicable): Access the cost sharing screen by clicking “Cost Sharing” from the left budget navigation. All budget items will be listed on the screen. To cost share an item, click the yellow “Detail” button to the left of the item name.

Cost Sharing by Breakdown (default method): Enter a value in the Sponsor “Percent” or “Salary”/“Cost” fields, and the Institution “Percent” and “Cost” fields will auto-calculate. Inversely, enter a value in either the Institution “Percent” or “Salary”/“Cost” fields, and the Sponsor “Percent” and “Salary”/“Cost” fields will auto-calculate. Select from the “Type” and “Category” pick lists. Click “Save” to save your entries.

Cost Sharing by Build Up (alternative method): For both the “Sponsor” and “Institution” sections, enter values in the “Salary” and “Fringe”/“Cost” fields. Select from the “Type” and “Category” pick lists. Click “Save” to save your entry.
**Add Cost Sharing Source (s):** Click the “+ Add Source” tab. The “Charge To” pick lists signify the project funding sources. For the “Inst” (“Short Name” field) cost sharing amount (populated from the Cost Sharing screen previously completed), choose a “Charge To” source from the pick list. If a UNR account(s) is the source of cost sharing, be sure to list the account number(s) in the “Account Number” fields. Click “Save and Close” (top right of screen) to return to the Budget Summary.

![Cost Sharing Screen](image)

<table>
<thead>
<tr>
<th>Source</th>
<th>Charge To</th>
<th>Short Name</th>
<th>Actual %</th>
<th>Amount</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRC 1</td>
<td>A B Charitable Trust</td>
<td>Sponsor</td>
<td>65.00%</td>
<td>325,000.00</td>
<td></td>
</tr>
<tr>
<td>SRC 2</td>
<td>COOPERATIVE EXT - WHITE FINE</td>
<td>Inst</td>
<td>35.00%</td>
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<td></td>
</tr>
<tr>
<td>SRC 3</td>
<td>COOPERATIVE EXT - WHITE FINE</td>
<td>Unallow</td>
<td>0.00%</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add New Source</td>
<td></td>
<td></td>
<td></td>
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</tr>
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<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>100.00%</td>
<td>$500,000.00</td>
<td></td>
</tr>
</tbody>
</table>

**F. Uploading UNR Budget Justification:** Access the UNR Justifications screen via the left screen navigation, and upload the budget justification.

![Budget Justification Screen](image)

**G. Setup Screens:** The Setup screens allow the user to revise proposal setup information. For example, the project start and end dates may be changed, the PI can be changed or budget periods may be added or removed.
**H. Completing the Budget:** Once all budget screens have been completed, return to the Budget Summary screen and complete the budget by clicking “Complete Budget” near the top right of the screen.

![Budget Summary Screen](image)

This action will lock the budget from any further edits. If budget changes are needed after completing the budget, simply return to the Budget Summary screen, click “Un-Complete Budget” and make necessary changes. Once changes are complete, be sure to revisit the Budget Summary screen and click “Complete Budget” again.

Once the budget has been completed, exit and return the Setup Questions screen by clicking the “Done” icon in the upper left of the Budget Summary screen. (It looks like an open door with an arrow.) The screen will close, and you will return to the Setup Questions screen.

**Part 6: Proposal Docs & Forms Screen**

Next, upload any remaining proposal documents and forms (internal or external) to the proposal record. Select “Proposal Docs & Forms” from the left menu. Near the bottom of the screen, locate “Add Institution Forms/Support Documents.” This is the upload function.

**Part 7: Transmittal Form Screen**

Select “Transmittal Form” from the left menu. Until the pertinent form questions are loaded, little of the form will be visible. Load the pertinent form by choosing “Sponsored Projects Proposal” from the “Select Submission Type” pick list.

![Transmittal Form Screen](image)

After addressing all questions and fields, complete the form by checking the “Complete” box in the upper right of the screen. Should you need assistance with addressing any questions or fields, contact your Sponsored Projects pre-award administrator.
Part 8: Finalizing and Routing the Proposal for Internal Review

In this step, you will finalize the proposal and route it for internal review. Except the Finalize screen, all screens listed on the left menu should contain the red checkmark. If not, revisit and complete any screens without a red checkmark. You will not be able to submit the proposal for internal review until all screens have the red checkmark. Select “Finalize” from the left menu.

The proposal package needs to be converted to a PDF, so click “Build” in the “Assemble Application” section of the screen to perform the conversion.

Once the PDF is built, InfoEd will automatically advance the user to the “Submit for Internal Review” area of the screen (detailed below). Converted documents will appear in the “Form/Document Name” table. There are two internal review routes available on the screen: the Budget Pre-Review route and the Final Review route.

Budget Pre-Review: This route is used for budget pre-review. The user must first upload their detailed budget and budget justification to the proposal record in order to utilize this route. Since this is a pre-review route, the remaining proposal components are not expected to be completed, nor must they be completed to activate the route.

Final Review: The Final Review route is the final review and approval of the completed proposal. Individuals who will review and approve the proposal are as follows, in this order: 1. principal investigator (PI), 2. college grants and projects analyst(s) and/or area fiscal manager(s) of all key personnel, 3. other key personnel (if applicable), 4. chair(s)/director(s) of each unit having participating key personnel, 5. dean(s)/vice president(s) of each division having participating key personnel. Once the Final Review route is complete, Sponsored Projects will begin their review, and the assigned pre-award research administrator will contact the PI.

Click the thumb up icon to the right of the desired route. Accept any certifications, and click “Continue.”
Now, the route steps will appear in a new window. Click “Submit” in the upper right of the window to activate the route. Do not click, “Add New Person to Review Path” as the routing has been pre-configured to include all pertinent individuals.

Exit the proposal record by clicking the “Done” icon in upper left of the screen.

**User Assistance:** Your Sponsored Projects [pre-award research administrator](#) is available to assist with user questions.