Changes made to the transmittal form (a.k.a Funding Proposal smartforms)

In order to reduce administrative burden on PI's and research administrators across campus, we have implemented some changes to the transmittal form aka proposal smart forms. These changes help us automate a few key processes like F&A distribution, and proposal submission assignment. Below is an outline of these changes.

Project Workspace – summary info related to project

When a draft proposal is created in the portal, a Pre-Award Proposer is assigned. This is the person that will be responsible for the review/submission of your proposal.

Smartforms:

1. This is the information that will be used to create chartstrings, distribute academic credit, F&A return, and determine compliance requirements

The submitting institution should be **University of Georgia Research Foundation, Inc.**, unless the RFP stipulates that the submission must be from a University.

4. * **Select the Management Unit for this proposal:**

2.

The **Management unit** will be embedded in the chartstring (formerly known as the UGA account number). Making sure the correct department number is provided is extremely important as the department number is part of the chart string. Providing the wrong department number will result in errors in the chart string at award time.

6. Do additional departments need access to the funds?
○ Yes ○ No *Clear*
If yes, please select additional departments

3.

This will replace internal subaccounts. If this question is answered yes, a Co-PI in the other department(s) must be identified and a detailed budget and detailed budget justification must be provided.

8. * **Application Submission Deadline:**

4.

In order to ensure that the Pre-Award Proposer assigned to your proposal has adequate time to review and submit the proposal, the due date is required.

5. These three questions will be used to create the portions of the chartstring.

3. * **Project Type:**
● Research
○ Ag. Experiment Station
○ Public Service
○ Cooperative Extension
○ Instruction

4. Project Sub Type:
○ DHHS Training / Fellowship
○ Basic Research
○ Applied Research
○ Developmental Research

5. Purpose:
○ Applied Research
○ Human Clinical Trial
○ Experimental Development
○ Instructional
○ Training Activities
○ Basic Research
○ Public Service

6. This information will help identify any potential Export Control issues. If Yes is selected, you must provide additional info. Click +Add and the screen below will open.

8. *** Are any foreign locations being used in project?** ○ Yes ○ No _Clear_

If "Yes", provide additional information below:

+ Add

Country:
[▼]

Association Type:
[▼]

*** Required**   **OK**

If you answered yes to question #8 (Are any foreign locations being used…?), additional information will be required on the Additional Personnel page.

3. *** Are there foreign parties involved in this project?** ○ Yes ○ No _Clear_

If yes, please provide additional information below:

+ Add

Click +Add and the screen below will open.

Name:
[   ]

Organization:
[   ]

Country:
[▼]

Role:
[   ]

*** Required**   **OK**

7. Previously F&A was distributed manually on an annual basis based on information provided on this page. With People Soft we will be able to use the data on this page to automatically distribute F&A on a monthly basis. Since this process is being automated, it is extremely important that the correct departments and corresponding percentages are provided.

F&A Distribution

1. * PI Credit Info:

Name				
✐ Update	test-pi1 test-pi1			

Unit Name	Code	%
Department of Infectious Diseases	211	33%
Center for Tropical & Emerging Global Diseases	374	34%
Department of Cellular Biology	194	33%

2. Co-PIs Credit Info:

Name
There are no items to display

8. The effort committed by the PI and other senior and key personnel will be tracked for all project types, regardless of funding source. **The SPA Pre-Award Proposer will record this information. If you are a PI or a departmental person you do not need to fill out this page and you can ignore it until an award is made.**

1. Effort of UGA Personnel:

Name	Role	Effort			
		Start Date	End Date	Effort in Person Months	Is Committed?
✐ Update test-pi1 test-pi1	PD/PI	1/1/2021	12/31/2021	1	true
		1/1/2019	12/31/2019	1	true
		1/1/2020	12/31/2020	1.5	true

2. Effort of UGA Personnel not on Transmittal:

+ Add

Name	Role
There are no items to display	

3. Comments:
Enter date of effort review by GO & GO initials or other relevant notes here (i.e. revised budget with new effort, etc.)

mm 06/01/2018