

Create a Grant Proposal

Purpose:

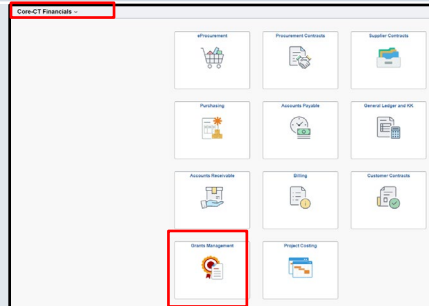
This job aid will help you create a Grant Proposal in Core-CT.

Steps

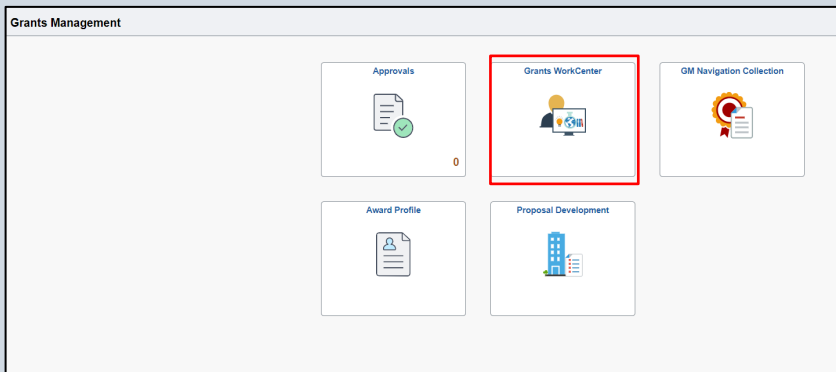
Screenshots

1. Navigate to the **Maintain Proposal** page: **Nav Bar > Menu > Core-CT Financials > Grants > Proposals > Maintain Proposal OR Core-CT Financials > Grants > Grants Workcenter > Create Proposal**

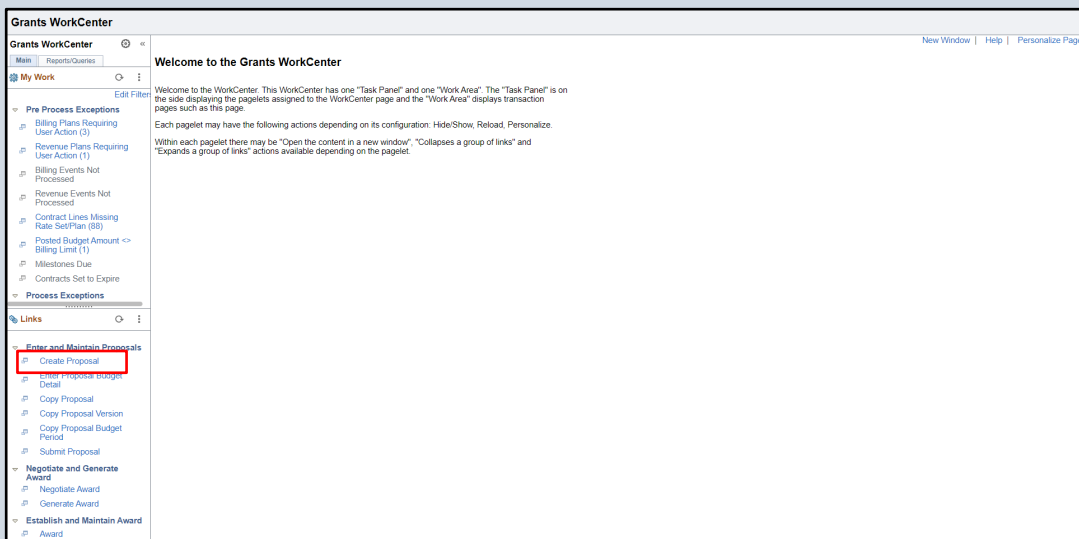
2. Select **Core-CT Financials** then select the **Grants Management Tile**



3. Select **Grants Workcenter Tile**



4. Select **Create Proposal**



Create a Grant Proposal

Steps

5. Select the **Add a New Value** tab.
6. Use the lookup icon to select a valid **Business Unit**.
7. Click the **Add** button.

Screenshots

8. Enter a description in the **Description** field (20 char. max).
9. Enter a proposal title in the **Title** field.
10. Enter a long description in the **Long Description** field (254 char. max).
11. Click on the **PI ID** lookup and select a valid value.
12. Click on the **Sponsor ID** lookup and select a valid value.
13. Click on the **Purpose** lookup and select a valid value.
14. Select a valid **Proposal Type** from the dropdown menu.
15. Click on the **CFDA** hyperlink and select a valid value.

Create a Grant Proposal

Steps

Screenshots

16. Click on the lookup to select a valid **CFDA** number.

17. Click the checkbox for **Primary**.

18. Click on the **Return to Maintain Proposal** hyperlink.

CFDA

Proposal ID NEXT Version ID V101
Description Test Test Currency USD

CFDA

CFDA	Program Title	Primary		
<input type="text"/>		<input type="checkbox"/>	+	-

[Return To Maintain Proposal](#)

19. Enter a **Start Date** and **End Date** or use the **Calendar** icons to select dates.

20. Enter the number of budget periods in the **No. Periods** field.

21. Click the **Build Periods** button.

22. Click the **Due By** hyperlink.

[Due By](#) Budget Express Additional Information CFDA

*Start Date 04/08/2024 *End Date No. Periods [Build Periods](#)

23. Enter the **Due By**, **Due Date**, **Due Time** and **Due Timezone** to inform Approvers when the proposal is due.

24. Click the **OK** button.

Due By Help

Proposal ID NEXT Version ID V101
Description Currency

Due By

Due By Due Date 03/18/2024
Due Time Due Timezone

[OK](#) [Cancel](#) [Refresh](#)

Create a Grant Proposal

Steps

Screenshots

25. Click on the **Projects** tab.

26. The **Department**, **Institution** and **Subdivision** fields default based on the PI selection. Click on the lookup icons to select a different **Department**, **Institution** and **Subdivision**, if necessary.

27. To add additional projects, click on the “+” button to add additional projects.

28. In the **F & A Distribution** section, the **Department** field defaults based on the PI selection. Click on the lookup icons to select a different **Department** for Facilities and Administration Distribution, if necessary.

29. If multiple departments will share the F&A Distribution, click on the “+” button and use the lookup icon to select another **Department**.

30. Update the **Percent Share** value, so that the total sum percentage for all departments is **100%**.

Create a Grant Proposal

Steps

Screenshots

31. Click on the **Budgets** tab.
32. Click on the **Budget ID** lookup icon to select a **Budget ID (Activity)**.
33. To add additional Activities, click on the “+” button and use the lookup to select a **Budget ID**.
34. Click the **Save** button. The Budget Periods will populate for the remainder of the project.
35. Click on the **F & A and Pricing Setup** hyperlink.

The screenshot shows the 'Budgets' tab selected in a navigation menu. The main content area displays the 'Budget Header' section with a 'Budget ID' lookup field highlighted in red. Below this is a 'Budget Period' table with one row. At the bottom, the 'F & A and Pricing Setup' link is highlighted in red. The interface includes various filters, a search bar, and a 'Save' button.

36. Click on the **Rate Type** lookup to select **GRANT** as the Rate Type.
37. Verify that the **FA Base** and **Budget Rates** are accurate.
38. Click the **OK** button.

The screenshot shows the 'GM_BUD_FA' dialog box. The 'Rate Type' lookup field is highlighted in red. The 'Budget' section at the bottom is also highlighted in red, showing the 'FA Base' and 'Budget Rates' fields. The dialog includes 'OK', 'Cancel', and 'Apply' buttons.

Create a Grant Proposal

Steps

Screenshots

39. Click the **1** hyperlink to add the budget for that **Budget Period** for that **Activity**.

Budget Period

1-2 of 2

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	04/08/2024	04/08/2024		Program Income	<input type="text"/>
2	04/09/2024	04/10/2024		Program Income	<input type="text"/>

F & A and Pricing Setup Total

40. Click on the **Budget Item** lookup icon to select a Budget Item.

41. Click on the **Details** icon to enter in Details about the Budget Item or enter in a high-level **Total Direct** amount.

42. Click the “+” button to add additional Budget Items for that Activity and repeat steps 40-43.

43. Click the **Save** button. The totals for that Budget Item will display below.

44. Click the **Return to Maintain Proposal** hyperlink.

Details, CostShare, Justification

1-1 of 1

Line Data More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share		
10	<input type="text"/>	<input type="text"/>		<input type="text" value="0.00"/>	0.00	Cost Share	<input type="checkbox"/>			<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
	Sponsor Direct	0.00		Sponsor F&A	0.00		Total Sponsor Budget				0.00
	Institution Cost Share	0.00		Institution Cost Share F&A	0.00		Total Inst C/S Budget				0.00
	Third Party Cost Share	0.00					Total TP C/S Budget				0.00
	Total Direct	0.00		Total F&A	0.00		Total Budget				0.00

[Return To Maintain Proposal](#)

Save

Create a Grant Proposal

Steps

Screenshots

45. If multiple Budget IDs were created, in the **Budget Header** section, click the **View All** hyperlink to view multiple **Budget IDs**.

46. If multiple Projects were created, in the **Proposal Project** section, click the **View All** hyperlink to view multiple projects.

47. If multiple Budget IDs, Budget Periods or Projects were created, repeat steps 39-43 as needed to continue entering a budget.

Proposal Project

 | < > 1 of 1 > > | View All

Project ID DOL0071PUIF20UI Title FY20 Unemployment Insurance

Budget Header

 | < > 1 of 1 > > | View All

Budget ID 147501 Description Personnel Costs (Payroll) + -

Start Date 10/01/2019 End Date 09/30/2020

Include in Proposal

Budget Period
< > 1-1 of 1 > >

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	10/01/2019	09/30/2020		Program Income	<input type="text"/>

F & A and Pricing Setup
Total

Create a Grant Proposal

Steps

Screenshots

48. Click on the **Resources** tab.

49. In the **Resource** section, click the **Type** lookup icon to select a Resource Type.

50. Enter in **Comments**.

51. In the **Professional** section, the PI will automatically display from the Proposal tab.

52. Click the “+” button to add additional Professionals. If Workflow is being used, there needs to be rows assigned for each role in the Workflow (ex. Principal Investigator, Branch/Section Chief, Fiscal Officer, etc.)

53. Click the **Employee ID** lookup icon to select the employee.

54. Click the **Other Role** lookup icon to select the employee’s role in the proposal.

55. Click the **Workflow Eligible** checkbox if the employee should be included in the Workflow.

56. Repeat steps 52-55 as needed for all key Professionals involved with this Grant Proposal.

57. Click the **Save** button.

Create a Grant Proposal: Optional Pages

Steps

Screenshots

58. Optional: To enter Certifications, click on the **Certifications** tab.

59. Click on the **Certification Code** lookup icon to select the Certification type.

60. Enter additional information in the **Certification Date**, **Indicator**, **Certified By**, **Approval Date**, **Expiration Dt**, **Assurance Number** and **Exemption Number** fields.

The screenshot shows the 'Certifications' tab selected in the navigation menu. The main content area displays a form for entering certification details. The 'Certification Code' field is highlighted with a red box, showing a search icon and a dropdown arrow. Other fields include 'Certification Date', 'Indicator', 'Certified By', 'Approval Date', 'Expiration Dt', 'Assurance Number', and 'Exemption Number'. The form is part of a larger proposal record for 'FY20 Unemployment Insurance'.

61. Optional: To notify anyone viewing the proposal that a report is required, click on the **Reports** tab.

62. Select a Report **Type** from the dropdown menu.

63. Enter in **Comments**.

The screenshot shows the 'Reports' tab selected in the navigation menu. The main content area displays a form for entering report details. The 'Type' dropdown menu and the 'Comments' text area are highlighted with a red box. The form is part of a larger proposal record for 'FY20 Unemployment Insurance'.

64. Optional: To add an attachment to the proposal, click on the **Attachments** tab.

65. Click on the paperclip icon and follow the prompts to add an attachment.

The screenshot shows the 'Attachments' tab selected in the navigation menu. The main content area displays a table for managing attachments. The 'Attached File' column has a paperclip icon highlighted with a red box. The table has columns for 'Requests' and 'Attached File'. The form is part of a larger proposal record for 'FY20 Unemployment Insurance'.

Create a Grant Proposal: Optional Pages

Steps

Screenshots

66. Optional: To view or update the project location, click on the **Location** hyperlink.

67. Click on the **Location** lookup icon to select a different location.

*Note: For tabs that do not display at the top of page use the options in the **Go To** section of the page to navigate*

Proposal ID CON Version ID V101
Description UI

Location (highlighted)

Project ID DOL0071PUIF20UI Title FY20 Unemployment Insurance

*Location Description DOL Business Management Foreign Primary + -

*Congressional District

Country USA United States Phone

Address 1 Ext

Address 2 Business Management Fax

Address 3

City

County Postal

State Connecticut

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments | Location

68. Optional: To add keywords to the proposal, click on the **Keywords** hyperlink.

69. Click on the **Keyword** lookup icon to select a keyword.

Proposal ID CON Version ID V101
Description UI

Key Words (highlighted)

Key Word Detail

 1 of 1

*Keyword	Description		
1 <input type="text"/> <input type="button" value="Q"/>			+ -

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments | Key Words