

# Princeton ERA Proposal Development Quick Guide

Last updated: 8/25/2022

## Step 1: Create the Funding Proposal

From your Princeton ERA dashboard, click the Create button and select Create Funding Proposal. The new funding proposal SmartForm will open.

## Step 2: Complete the Funding Proposal SmartForm

Complete each page of the funding proposal SmartForm. Enter information regarding the proposal, personnel, and compliance information.

## Step 3: Add PI Assurances Ancillary Reviews

A required ancillary review with the type "Assurances" must be added using the Manage Ancillary Review activity for all co-PIs, co-Investigators, senior key personnel, and fellows/mentors on the proposal. (As of the August 2022 upgrade, the lead PI will use the Certify activity.) Assign the review to the individual if they will be completing it electronically; Assign the review to yourself if you will upload a signed paper/PDF version using the Submit Ancillary Review activity.

## Step 4: Complete Additional Proposal Activities

- Add additional ancillary reviews for cost share, indirect cost waivers, space change, PI eligibility, or other ad-hoc review.
- Display Team COI information to confirm disclosures and training are up to date for all federal proposals and any sponsor that has adopted the PHS FCOI regulations.
- Complete the Create-Update Cost Share(CS) Commitment activity, if applicable and ensure the CS commitment and CS budget are equal.
- Use the Create-Update SF424 activity + complete the SF424 (S2S only).
- Use the Add Comment activity to let your reviewers know you're using a multi-prong approach. If not, add the comment - "All research/narrative/science documents are final."

## Step 5: Develop the Budget

Complete your project budget by adding personnel costs and general costs. Create additional budgets, cost share budgets, or subaward budgets if needed.

## Step 6: Review Proposal and Submit for Review

Review your proposal for completion. Click the Submit for Department Review activity to submit the proposal. The proposal will go through departmental approval and ORPA review.

**Need help?** Check out the [detailed Funding Proposals guide](#) or contact [erasupport@princeton.edu](mailto:erasupport@princeton.edu).

The collage consists of six numbered screenshots illustrating the proposal development process:

- 1**: A dropdown menu with 'Create' selected, showing options for 'Agreements' and 'Grants'. The 'Create Funding Proposal' button is highlighted with a green box.
- 2**: A sidebar titled 'General Proposal Information' with a list of sections: Personnel (highlighted with a green circle and '2'), Submission Information, Budget Periods and Key Dates, Compliance Review, Additional Proposal Information, and Completion Instructions.
- 3**: A 'Manage Ancillary Reviews' screen. A modal window titled 'Add Ancillary Review' is open, showing fields for 'Organization' and 'Person' (both with dropdown menus), and a 'Review type' dropdown menu.
- 4**: A list of activities. The 'Submit For Department Review' activity is highlighted with a green circle and '4'.
- 5**: A 'Working Budgets' section. A table lists budgets, with 'NIH - National Institutes of Health' highlighted by a green box and a green circle with '5'.
- 6**: A 'Draft' status box. Below it, a 'Next Steps' section contains buttons for 'Edit Funding Proposal' and 'Printer Version'. The 'Submit For Department Review' button is highlighted with a green circle and '6'.