Proposed Approval Flow

Phase

PI

Proposal developed in **UFIRST**: a single system that facilitates building a budget by drawing in University salaries (distinguishing 9 & 12 month), combining multi-department, multi-year or multi-F&A into combined or separate views, validates proper F&A calculation and math, easily identifies payroll cost sharing and facilitates identification of non-payroll cost sharing, easily exports and imports. In addition the tool will include an investigator profile, support for limited and internal applications, S2S functionality, proposal development resources and document repository.

Department

Any named faculty and other key personnel?

Yes

No

Proposal include: F&A waiver? More than one F&A rate? Cost sharing? Subcontracts? Construction? Over TBD $ threshold? Ineligible[1] PI? Proposal from: not certified department[2]? Is the sponsor not in good standing (receivables)?

No

Proposal reviewed and approved by PI

Yes

Cost share involved in proposal?

No

Proposal reviewed and approved by PI

Proposal reviewed and approved by Chair

Proposal reviewed and approved by Chair

Submitting department?

Yes

Department submits

No

Alternative designated unit submits

Co-I

Notification with ability to affirm or deny sent to CO-I

No

Co-I Chair

Notification with ability to affirm or deny sent to CO-I Chair

Yes

Dean

Proposal reviewed and approved by Dean

Contractual obligations exist – such as IP?

Co-I Dean

Notification with ability to affirm or deny sent to CO-I Dean

Cost share chair

Proposal reviewed and approved by costshare Chair

Yes

Cost share Dean

Proposal reviewed and approved by costshare Dean

DSP

[1] Eligible PI includes such requirements as: up to date on all required institutional training; without conflicts of interest; and in good standing with regards to effort reporting, cost transfers, and compliance requirements.

[2]One of the critical elements of the proposal is certified department administration. Before such a system could be implemented, a certification program whereby department administrative support can be certified to submit on behalf of the institution. Such certification must be maintained through documented competency in developing appropriate proposals.

DSP Reviews

DSP submits