HarvardGMAS

Initial and Competing Renewal Proposal Entry
User Role(s): Central Administrators,
Department Administrators,
Principal Investigators
Last Updated: [05/3/2022]

This job aid provides information about the Initial and Competing renewal proposal entry fields.

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Org

Orgs are limited based on the security of the person who is doing the proposal entry. If security is limited to only one org, this field will not be editable. If security is open to more than one org, those orgs will appear in a dropdown. For long lists of orgs, the drop down will include a look up that will begin displaying matched results after entering a few characters.

For competing renewal proposals, this field will default the org based on the prior segment, but can be edited (if the person entering the competing renewal has security to more than one org).

Project type

Project type is a dropdown menu allowing the person entering to choose from the following:

- Basic research and all other
- Fellowship
- Task order
- Training grant

If Fellowship is selected, the Mentor field will appear under the Principal Investigator field and will be required.

Project types can be changed to and from Fellowship up until the proposal is awarded.

For competing renewal proposals, this field will not be editable and will maintain the project type from the prior segment. Fellowships do not have the option to create competing renewals.

Principal Investigator/Mentor

The Principal investigator and Mentor fields are limited based on the security of the person who is doing the proposal entry. If security is limited to only one PI, the Principal investigator field (or Mentor field if the project type is a Fellowship) will not be editable. If security is open to multiple PI's, the list will appear in a dropdown menu for the Principal investigator field (or Mentor field if the project type is a Fellowship). If security does not limit by PI, this will be a search field where any person in GMAS can be added as the Principal investigator/Mentor.

For competing renewal proposals, the Principal investigator field will default the PI based on the prior segment, but can be edited (if the person entering the competing renewal has security to more than one PI).

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Title

This text entry field allows letters, numbers, and special characters.

For competing renewal proposals, the Title field will default based on the prior segment, but can be edited.

Nickname

The nickname added in this field will be the nickname for the segment. It can also be added/edited at the segment level.

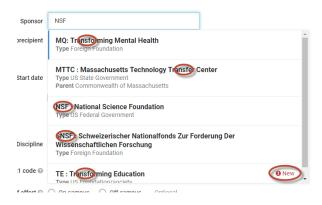For competing renewal proposals, the Nickname field will default based on the prior segment, but can be edited.

Sponsor

The sponsor field is an organization look up that will begin displaying matched results after entering a few characters. Matches will be made on the acronym and the full name of organizations.

For competing renewal proposals, the Sponsor field will default the organization based on the prior segment and cannot be edited.

If an organization is listed as "New", the person entering the organization should work with OSP-NewSponsorApprovals@harvard.edu to get the organization approved and activated (which will help to prevent delay at award stage).

If there are two similar organizations (e.g., Tel Aviv University and Tel-Aviv University) please contact OSP-NewSponsorApprovals@harvard.edu to determine which sponsor is the right choice for the proposal.

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Harvard is a subrecipient

If this question is answered "Yes", the Prime sponsor and Prime PI fields will display and will be mandatory.

Prime sponsor

The prime sponsor field functions the same as the sponsor field. The organization that is funding the sponsor should be entered here.
Example: If Harvard is submitting a proposal to MGH, and MGH is submitting the complete proposal to NIH, then NIH is the Prime sponsor, and MGH is the sponsor.

For competing renewal proposals, the Prime sponsor field will default the organization based on the prior segment and cannot be edited.

Prime PI

The prime PI field is an open person search that will begin displaying matched results after entering a few characters. The PI that belongs to the sponsor institution should be listed here.
Example: Using the funding structure from the prime sponsor example above, the person who is listed here would be the PI at MGH.

For competing renewal proposals, the Prime PI field will default the organization based on the prior segment, but can be edited.

Subrecipients are included in the proposal

Indicates if the proposal will include subrecipients. The response to this field will be used to help departments identify what proposals need to add subagreement(s) before lock and route.

Start date/Number of periods

Once a start date is entered, GMAS will calculate budget periods in 12 month increments for the number of periods entered. If budget periods fall outside of the normal 12 month increment, unchecking the box

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that says "Automatically generate budget periods" will allow the person entering the proposal to change the end dates for each period.

Start date	01/018/2018	Number of periods	5

☑ Automatically generate budget periods

Period 1 Jan 18, 2018 - Jan 17, 2019
Period 2 Jan 18, 2019 - Jan 17, 2020
Period 3 Jan 18, 2020 - Jan 17, 2021
Period 4 Jan 18, 2021 - Jan 17, 2022
Period 5 Jan 18, 2022 - Jan 17, 2023

Start date	01/18/2018	Number of periods	5

☐ Automatically generate budget periods

Period 1 Jan 18, 2018 - 12/31/18
Period 2 Jan 1, 2019 - 12/31/19
Period 3 Jan 1, 2020 - 12/31/20
Period 4 Jan 1, 2021 - 12/31/21
Period 5 Jan 1, 2022 - 5/1/22

The budget periods will be editable after leaving the entry screen from the "Proposed dates and dollars" panel from the proposal homepage.

Discipline

This field is a drop down menu with a look up that will begin displaying matched results after entering a few characters. The information provided here is used to complete the NSF HERD Survey. If it is unclear of what to enter here, please work with your Central Administrator.

For competing renewal proposals, the Discipline field will default based on the prior segment, but can be edited.

A21 code

A21 code is a dropdown menu allowing the person entering to choose from the following:

- A01 – Instruction & Training
- A15 – Scholarships & Student Aid
- A03 – Other Sponsored Activities
- A02 – Organized Research

For A21 definitions visit - http://hwpi.harvard.edu/os_fast/files/able/a21-definitions.pdf

For competing renewal proposals, the A21 field will default based on the prior segment, but can be edited.

Preponderance of effort

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The preponderance of effort field should be answered yes if 50% or more of the budgeted Harvard time and effort is performed on-campus.

For competing renewal proposals, the Preponderance of effort field will default based on the prior segment, but can be edited.

Has the proposal been submitted without institutional (OSP/SPA) review and approval?

Indicates if the proposal is being entered retroactively (the proposal has been submitted to the sponsor without going through the review and approval process).

Due to sponsor

Although this field is optional at this point, it must be completed prior to being able to lock and route the proposal for signatures. The date the proposal is due to the central submitting office, and the date the proposal is due to the sponsor, will not appear on the proposal homepage until this field has been completed.

Funding identifier

This field is intended for funding opportunity numbers if a grants.gov opportunity number is not entered, ASSIST numbers, common program/proposal mechanism identifiers (e.g., MRI, EFRI, SIG, YIP). For further clarification on what should be entered here, please work with your Central Administrator.

Data that is added to this field can be seen in the Requests report in OBI under the "Spon Tracking No" column.