

**Research Administration
Management Portal (RAMP)
Reference Guide: Funding
Proposal Reference Guide for the
Research Administration
Community**

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1 Introduction

This guide describes how members of the University of Wisconsin – Madison (UW-Madison) Research Administration Community create and submit single-project Funding Proposals for review in the Research Administration Management Portal (RAMP) Grants module. A separate guide describes how to create and submit Complex Proposals (also known as multi-project proposals).

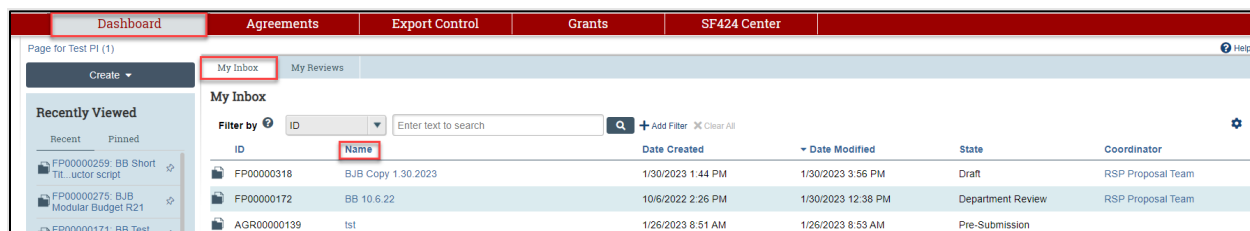
 **Tip:** You can access and open RAMP records you have permissions for based on your user role. Reference the Overview reference guide on the [RAMP website](#) for general information on navigation, user roles, searching, and workflow. The Overview guide also contains a glossary of RAMP terminology. [Workflows](#) of UW specific business process can also be accessed on the RAMP webpage.

2 Navigation

2.1 How to Access a Record

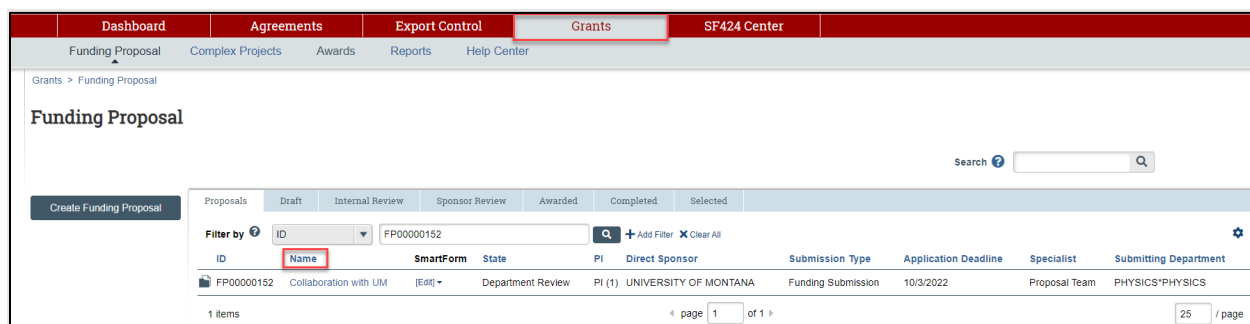
Locate or search for records on the Dashboard or Grants Module pages as shown below.

- **Dashboard, My Inbox page** – This page acts as your to-do list and contains records from the Grants, Agreements, and Export Control modules that require an action from you. To access a record, select the record **Name**.



ID	Name	Date Created	Date Modified	State	Coordinator
FP00000318	BJB Copy 1.30.2023	1/30/2023 1:44 PM	1/30/2023 3:56 PM	Draft	RSP Proposal Team
FP00000172	BB 10.6.22	10/6/2022 2:26 PM	1/30/2023 12:38 PM	Department Review	RSP Proposal Team
AGR00000139	tst	1/26/2023 8:51 AM	1/26/2023 8:53 AM	Pre-Submission	

- **Grants Module page** – Funding proposal and award records can be accessed on this page. To access a record, select the record **Name**.




2.2 How to Search for a Record

The Dashboard, Grants Module, and Agreements Module pages are all Workspaces (projects also have Workspaces). Workspaces contain a listing of records that can be searched, filtered, and sorted to help a user find a record or subset of records.

The sections below outline how to search, filter, and sort the records listed on a Workspace.

2.2.1 Search Using One Field

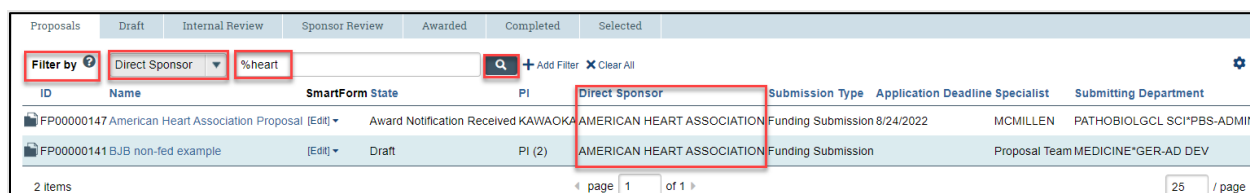
Use the **Filter by** fields to search for a record by various information (e.g., ID, Name, State, etc.).

This guide covers the two most common searches. Select the **Help text icon**  for more information about search options.

The most common searches are:

- **Search for key words** – Use the wild card feature by entering a “%” sign before the key word.


In the example below, the user searched for the word “heart” in the direct sponsor by selecting “Direct Sponsor” in the Filter by drop-down list and entering “%heart” in the search field.




- **Search excluded key words** – Enter “!=” prior to the key word.

In the example below, the user excluded proposals in the Not Funded state by selecting “State” in the Filter by drop-down list and entering “!=not funded” in the search field.

Proposals											
Draft		Internal Review		Sponsor Review		Awarded		Completed		Selected	
Filter by		State	!=not funded								
ID	Name	SmartForm	State	PI	Direct Sponsor	Submission Type	Application Deadline	Specialist	Submitting Department		
FP00000033-Res2	DDH testing Issues00070680 - Resubmission - 1	[Edit]	Draft		ADMINISTRATION*RSRCH SERV	Resubmission	6/23/2023	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000145-Rev1	KM CTA Demo - Revision - 1	[Edit]	Draft		GLAXOSMITHKLINE	Revision	2/28/2023	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000145	KM CTA Demo	[Edit]	Awarded		GLAXOSMITHKLINE	Funding Submission	8/22/2022	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000320	PR Test-Renewal	[Edit]	Proposal Status Confirmation		LUPUS FOUNDATION OF AMERICA, INC	Renewal	4/1/2023	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		

Select the **Search icon**  to complete the search and select **Clear All** to clear the search and return to the full record listing.

2.2.2 Search Using Multiple Fields



To search records using multiple Filter by fields, select **Add Filter**, add the search criterion for each field, and select the Search icon  to complete the search. Select **Remove Filter** to remove a filter from a search.

Proposals											
Draft		Internal Review		Sponsor Review		Awarded		Completed		Selected	
Filter by		State	Pending								
and by		Direct Sponsor	%science								
ID	Name	SmartForm	State	PI	Direct Sponsor	Submission Type	Application Deadline	Specialist	Submitting Department		
FP00000284-Con1	DDH 1-17-23 Demo Prep - Continuation	[Edit]	Pending Sponsor Review		NATIONAL SCIENCE FOUNDATION	Continuation		Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000199	DDH Compliance Page Demo_10-17-2022	[Edit]	Pending Sponsor Review		NATIONAL SCIENCE FOUNDATION	Funding Submission	10/24/2022	Proposal Team	PHYSICS*PHYSICS		

2 items < page 1 of 1 > 25 / page

2.2.3 Sorting Records

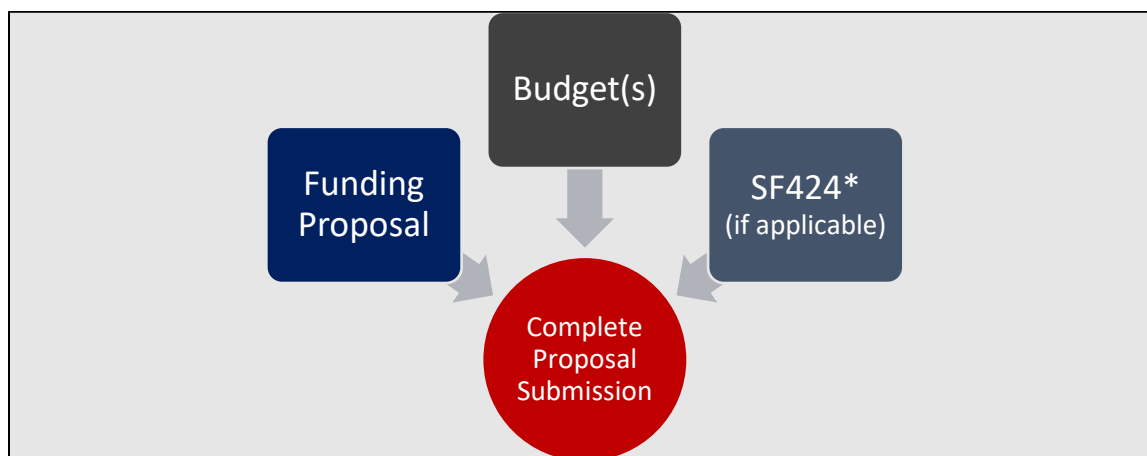
Records can be sorted by most column headings (blue column headings are sortable). To sort records, hover over the sortable column header until the hand icon appears and then select the **column header name** to sort the column. To reverse the sort order, select the **column header name** again.

ID	Name
 AGR00000084	Agreement for: DDH Advance Account Demo_20220811
 AGR00000142	Agreement for: DDH copy to see if endorsement letter copies


3 Creating a Proposal

Complete proposal submissions consist of:

1. A funding proposal record.
2. At least one budget record. Additional budgets may be completed as necessary to reflect separation of funds between investigators, departments, cost share, subawards, etc.
3. An SF424 record, if applicable. Federal proposal submissions submitted directly to Grants.gov using RAMP (also called system-to-system or S2S) will contain an SF424 record (marked with an asterisk * in the image below as SF424 records are only required for system-to-system submissions).



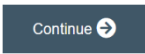
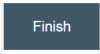

Step-by-step instructions on how to complete a funding proposal record, a proposal budget(s) record, and an SF424 record are contained below. This guide also covers how UW-Madison will use RAMP to manage internal competitions and pre-proposal submissions.



 **Note:** RAMP will also be used for limited submission competitions and certain pre-proposals that require RSP review and signature. Reference the [appendix](#) of this guide for instructions for these types of submissions.

3.1 How to Create a Proposal Record

Complete the Funding Proposal SmartForm to create a proposal record. The Funding Proposal SmartForm is a series of pages where you will answer questions about the proposal. For federal submissions that will be submitted directly to Grants.gov in RAMP (referred to as system-to-system “S2S” submissions), many of the answers to the Proposal SmartForm questions will populate on the SF424 form.

Follow the steps below to create a new proposal record:

1. On the Dashboard or Grants Module page, select the **Create Funding Proposal** button on the left-hand side of the page.
2. Complete the Proposal SmartForm pages. The subsections below provide directions for how to complete each of the pages. Select **Continue**  at the bottom of each page to navigate through the SmartForm pages (the final page has a Finish  button instead of a Continue button). Selecting Continue will save the record and move you to the next page. Selecting **Save**  will save the record and remain on the same SmartForm page.


 **Tip:** Select the **Help icons**  throughout the SmartForm for additional information on how to answer the questions.

3.1.1 [General Proposal Information Page](#)


1. Type of application – Defaults to “new” for new proposals.

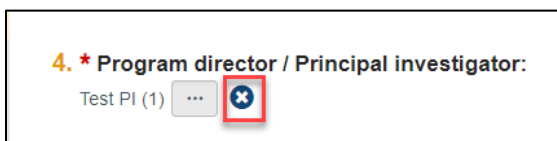
Indicate (Yes or No) if the award is being transferred from another institution.


2. Short title of proposal – Enter a short title to help users identify the record in RAMP.

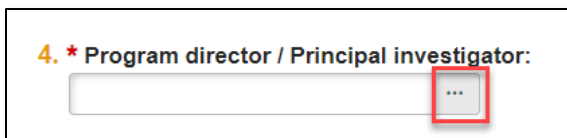
 **Tip:** If the proposal is for a fellowship, include the fellow's name here. The short title identifies the proposal throughout system, such as in the RAMP Dashboard, Grants Module page, and in reports. *Example: Davidson DOE Lunar Study*

3. Long title of proposal – If this is an SF424 application, this title will display on the SF424 forms (long titles are limited to 255 characters).

4. Program director/Principal investigator –The field defaults the PI to the name of the individual initiating the record. To select a different PI, first clear (or remove) the listed PI by selecting the “X”  next to the PI’s name. Next, search for the desired PI by either typing the PI’s name directly into the question field or selecting the **ellipses** (or three dots “...”) in the question field to open a more detailed search window.



4. * Program director / Principal investigator:
Test PI (1) ... 



4. * Program director / Principal investigator:
... 

 **Notes:**

- For proposals with a Multiple PI, list the Contact PI here. Additional (multiple) PIs can be listed on the Personnel page. The Contact PI must certify the proposal using the Certify activity. For proposals with Multiple PIs, the additional PIs will certify the proposal via an Ancillary Review. Reference the Ancillary Review guide for more instructions on using the ancillary review function in RAMP.

- If the proposal is specifically for mentored research, enter the Mentor/Sponsor name in Question 4. The Fellow/Trainee name will be entered on the [Personnel Page](#).

5. Select the direct sponsor – Enter the sponsor’s name.

If the sponsor's name is not listed, Select Sponsor Name “TBD Sponsor Not in System” and/or ID “Sponsor Not in System”. Users may search by either TBD or Sponsor. Enter the sponsor's name in Question 5a. After you save your work on the page, complete the [Add Sponsor Information](#) form on the RSP website to initiate the new sponsor addition process.

If UW-Madison is a subrecipient on a funding proposal for the organization listed in Question 5, enter the prime sponsor in Question 5b. *Example: Department of Energy (Q5b), when the direct sponsor is Northwestern University (Q5)*



Tip: Section 2.2.1 of this guide provides guidance on how to search in RAMP. The sponsor selection is fed from the sponsor repository in SFS. Sponsor names in RAMP will be reflected in the same manner as they are/were in WISPER and WISER.


6. Instrument type – Select the appropriate instrument for the proposal.


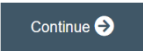


7. Primary purpose of this project – Select the primary purpose of the project. Selecting Research as the primary purpose will generate a required sub question 7a (Type of research).

8. Expected start date – Enter the expected start date.

9. Submission Information – This question collects important information to ensure a correct and timely proposal submission. Specify in ALL CAPS if the time of submission is after 4:30 pm Central (outside of RSP business hours). Also include the following items as necessary: submission method if not using the SF424, email addresses if the submission is to be emailed, indication of document(s) requiring signature, and any other important information.


10. Is this a limited submission – Select Yes only if submitting for an OVCRGE limited submission competition. Select No for all other submissions.


 **Note:** Select “No” for all proposals to an extramural sponsor, even if the submission included a prior limited submission competition. Reference the [Internal Competitions for Limited Opportunities](#) directions if needed.

 **Tip:** Select **Continue**  at the bottom of each page to navigate through the SmartForm pages (the final page has a Finish  button instead of a Continue button). Selecting Continue will save the record and move you to the next page. Selecting **Save**  will save the record and remain on the same SmartForm page.


3.1.2 [Personnel Page](#)

- 1. Program director / Principal investigator** – This field contains the name selected on the prior page. For system-to-system submissions, information entered in Question 1 will map to the SF424 record.
 - a. Select the fellow in Question 1a if this submission is a fellowship.
 - b. Upload a biosketch under Question 1b, if necessary for the current funding opportunity.


 **Note:** If this is a fellowship, upload the fellow’s Biosketch here, otherwise upload the biosketch for the Program director / Principal investigator.
 - c. Upload an Other Support document under Question 1c, if required by the funding opportunity announcement.
- 2. Responsible department / division / institute** – Enter the department that will manage the proposal and award. This will default to the PI’s department and may need to be updated. The department/division/institute entered here will perform the department review step of the proposal review workflow.

 **Note:** RAMP uses the term “department review” to indicate the school/college/dean’s level approval that occurs before RSP review and approval. The review that is labeled as “department review” in RAMP is considered “divisional/dean’s office review” at UW-Madison.

3. Project personnel – Enter UW-Madison key (including multiple PIs), non-key, or other significant contributor (OSC) personnel in Question 3a and enter non-UW-Madison key personnel in Question 3b for example, consultants or subrecipients.

 **Note:** The system maps all UW-Madison personnel marked as key personnel to section A of the Research & Related Budget in the SF424 forms (if applicable), and all personnel marked as non-key map to section B of the Research & Related Budget. All key personnel, including non-UW-Madison key personnel will map to the Senior Key Person Profile section of the SF424.

4. Administrative personnel – The Administrative Contact in Question 4a defaults to the logged in user who created the funding proposal record. The Administrative Contact entered in Question 4a will be able to edit the proposal, respond to reviewer notes, and will receive many notifications about the Funding Proposal record. Change to the appropriate contact if applicable. Enter any additional contacts who may need edit or read-only access to the record under Questions 4b and/or 4c. Contact your Dean’s Office (School/College/Division) Research Administration Office if you have questions about which team members to list for this question.

 **Important:** For system-to-system applications (using the SF424 functionality) add your Dean or Division Office reviewers to Question 4b so they automatically get edit access to the SF424 upon its creation.

[3.1.3 Submission Information Page](#)


3.1.3.1 For a Federal Proposal:

1. Submission type – No data entry. “Federal” is shown based on the sponsor selected on the General Proposal Information page.

2. Direct sponsor – No data entry. The sponsor selected on the General Proposal Information page is shown.

3. Will this application be submitted system-to-system (S2S)? – Select Yes or No as appropriate.

- System-to-system applications are submitted directly to Grants.gov from RAMP. System-to-system is supported for many Grants.gov submission opportunities.
- If **yes**, then enter or search for the Package ID, Opportunity ID (including dashes), CFDA number (assistance listing), or Competition ID under Question 4 and select **Find** to search for an opportunity. After the opportunity displays, select the radio button next to the Package Id to select it. Question 5 defaults to Brenda Egan in RSP but can be changed if your Dean’s Office uses a different contact name on applications. The person entered here will pre-populate as the Person to be Contacted on the SF424 R&R Cover Page.

 **Note:** Reference the next section for how to process a Grants.gov application that will not be submitted using the SF424 forms in RAMP.

Example, an NSF application submitted through Research.gov

3. Will this application be submitted system-to-system?
 Yes No [Clear](#)

4. Type a package ID, opportunity ID, or CFDA number, and click Find. [?](#)

Package ID: [Find...](#) [Clear](#) [Refresh Form Support](#)

Opportunity ID (PA or RFA number):

CFDA number:

Competition ID:

Package Id	Opp Id	Opportunity Title	Opening Date	Closing Date	CFDA	Comp ID	Instructions
<input checked="" type="radio"/> PKG00075058	PA-GN-R01	G.g. Training and NIH Ext-UAT FOA (R01-Clinical Trial Not Allowed)	8/13/2021	8/12/2025	93.855	FORMS-G	

- If **no**, then search for the opportunity using the directions above or enter the funding announcement opportunity identifiers (Package ID, Opportunity ID, and/or Opportunity title) under Questions 4a, 4b, and 4c. If the opportunity is a NIH grant, select the grant type under Question 5. Any general submission documents can be attached

under Question 6. For specific guidance on what may be required, please see the RSP proposal preparation page:

<https://rsp.wisc.edu/proposalprep/>.

3. * Will this application be submitted system-to-system?
 Yes No [Clear](#)

4. Type a package ID, opportunity ID, or CFDA number, and click Find. [?](#)

Package ID: [Find...](#) [Clear](#) [Refresh Form Support](#)

Opportunity ID (PA or RFA number):

CFDA number:

Competition ID:

If the desired opportunity is not listed above, type its ID and title below:

a. Package ID:

b. Opportunity ID:

c. Opportunity title:

5. NIH grant type (if applicable):
 ...

6. Add any general submission documents:

[+ Add](#)

Name	Version
There are no items to display	

3.1.3.2 For a Non-Federal Proposal:

1. Submission type – No data entry. The information shown here is based on the sponsor selected on the General Proposal Information page.

2. Direct sponsor – No data entry. The sponsor selected on the General Proposal Information page is shown.

3. Add any general submission documents – For specific guidance on what may be required, please see the RSP proposal preparation page:

<https://rsp.wisc.edu/proposalprep/>.

3.1.4 Funding Opportunity Announcement Page

This page is only displayed for system-to-system submissions and contains a list of required and optional SF424 Forms and identifying opportunity information from the prior page and indicates if the forms are supported by the system.

There is no data entry on this page.

**Notes:**

- A SF424 must be created manually for S2S submissions.
- If any of the forms are not supported, the opportunity cannot be submitted system-to-system. In this rare circumstance, return to the prior page and update Question 3. “Will this be submitted system-to-system?” to indicate No. If you expected your submission to be submitted system-to-system and think the unsupported form(s) is incorrect, contact the RSP Proposal Team.



Important: If the screen indicates all forms are supported under Questions 1 and 2, but you still receive a red error message indicating “Some of the required forms are not supported. Submission would not occur electronically,” navigate back to the Submission Information page and select **Refresh Form Support** as shown below:

Funding Opportunity Announcement

Some of the required forms are not supported. Submission would not occur electronically.

1. Required SF424 forms:

Form Name	Supported
SF424 (R & R) V5.0	yes
Project/Performance Site Location(s) V4.0	yes
Research And Related Other Project Information V1.4	yes
Research & Related Senior/Key Person Profile (Expanded) V4.0	yes
PHS 398 Cover Page Supplement V5.0	yes
PHS 398 Modular Budget V1.2	yes
PHS 398 Research Plan V5.0	yes
PHS Human Subjects and Clinical Trials Information V3.0	yes

4. Type a package ID, opportunity ID, or CFDA number, and click Find. ?

Package ID:

Opportunity ID (PA or RFA number):

CFDA number:

Competition ID:

3.1.5 [Budget Periods and Key Dates Page](#)

1. Application submission deadline – Enter the date the proposal is due to the sponsor.

 **Notes:**

- For incoming subaward/consortium proposals, enter the date the application submission is due to the direct sponsor (Pass-Through Entity).
- All UW-Madison proposals must be submitted during standard business hours. If the deadline has unusual times of submission (e.g., after 4:30pm Central Time), enter the submission details in Question 9 “Submission Information” on the General Proposal Information page.

2. Date response expected from sponsor – Enter the date you expect a response from the sponsor.

3. Date projects starts – No data entry. The start date entered on the General Proposal Information page is shown.

4. Date project ends – No data entry. The end date displayed is the end date of the last budget period in Question 7. Edit the budget periods in Question 7 to adjust this date.

5. Project length (years) – No data entry. The number of years displayed is based on the budget periods in Question 7. Edit the budget periods in Question 7 to adjust this duration.

6. Modular budget – Select Yes or No as appropriate based on sponsor guidelines.

7. Budget Periods – The system automatically creates 5 periods that are 12 months each, even if your funding opportunity specifies a different project period (e.g., 2 years). Select the **Add Period**, **Remove Period**, and/or **Update Periods** buttons to modify the periods as necessary. To enter specific period end dates (instead of the default end dates), select the **Use advanced editing** checkbox in the Update Periods window.

7. Add Period Remove Period Update Periods


Budget periods:






Period Number	Name	Duration (Months)	Start Date	End Date
1	Period 1	12	7/1/2024	6/30/2025
2	Period 2	12	7/1/2025	6/30/2026
3	Period 3	12	7/1/2026	6/30/2027
4	Period 4	12	7/1/2027	6/30/2028
5	Period 5	12	7/1/2028	6/30/2029

Edit Budget Period

Update Budget Periods

Use advanced editing

* Project start date
7/1/2024 

Period number	Name	* Period end date
1	<input type="text" value="Period 1"/>	6/30/2025 
2	<input type="text" value="Period 2"/>	6/30/2026 
3	<input type="text" value="Period 3"/>	6/30/2027 
4	<input type="text" value="Period 4"/>	6/30/2028 
5	<input type="text" value="Period 5"/>	6/30/2029 

3.1.6 [Compliance Review Page](#)

This page contains compliance questions that UW-Madison will use as part of the funding proposal review process, and all questions on this page are mandatory. Select **Yes** or **No** or check the appropriate boxes for Questions 1-9. Check the appropriate boxes for Questions 10-11 (more than one box may be selected for each question). In some cases, answering Yes or checking a box will prompt additional questions to be displayed.

For Questions 1-4, if the answer is “yes” the associated protocols will be displayed. To associate a funding proposal with a specific protocol, you’ll need to access ARROW and update the protocol’s funding selection.

Guidance on how to complete these steps in ARROW can be found here: <https://research.wisc.edu/research-compliance-and-ethics-oversight/animal-research/research-animal-resources-and-compliance-arrow/>.

3.1.7 [Additional Proposal Information Page](#)


1. Will there be program income? – Select **Yes** or **No** to indicate whether the funding proposal will have program income.


2. Select resources required for this proposal – Select resources as applicable. Upload information about the use of the selected resource and approval if required. Uploading information is mandatory if one or more resources are selected.

3. Will any research cores or centers be used for this proposal? – Select **Yes** or **No** as appropriate. Selecting Yes will provide a text box to enter the names of the core(s) and/or center(s).

3.1.8 [Completion Instructions Page](#)

No data entry. This page provides guidance on what to do after you have completed the SmartForm, including how to validate that all required questions were completed. Review the instructions and select **Finish** when complete to return to the Proposal Workspace.

 **Important:** Selecting **Finish** does **not** submit your proposal to your Dean’s Office or RSP. This allows for additional edits and/or actions to occur prior to the proposal submission (e.g., completing the budget, creating/updating the SF424, etc.). When all proposal components have been completed, the funding proposal can be submitted for review by selecting the **Submit for Department Review** activity on the Proposal Workspace.

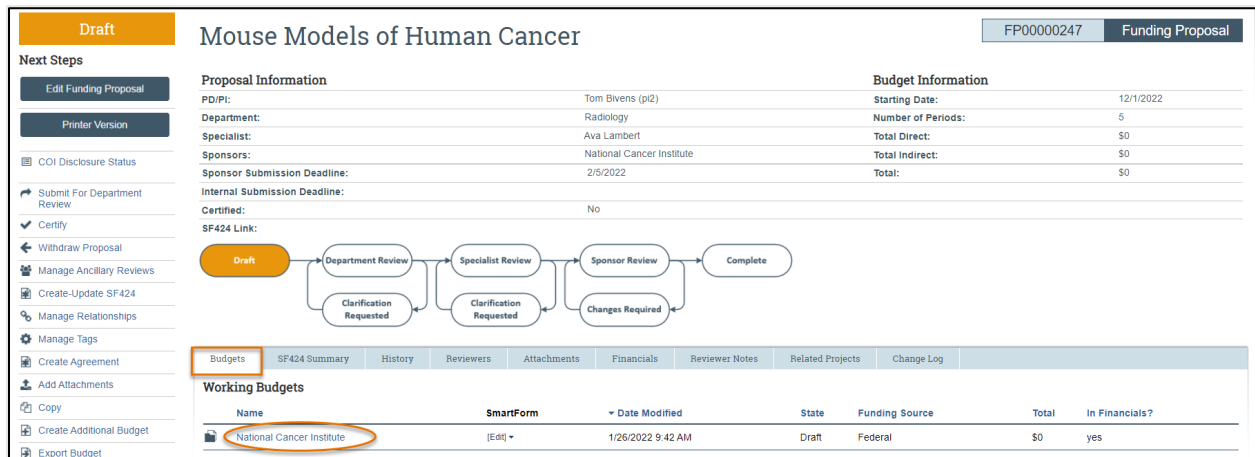
 **Tip:** to validate the submission, select the **Validate tab** in the left navigator.



3.2 [How to Create a Budget](#)

The next step in the proposal submission process is to access the Budget Workspace and complete the Budget SmartForm to build the proposal budget. After the proposal has been created, the system automatically creates a budget record with the name of the direct sponsor. Additional budgets may be created if necessary. Follow the steps below to complete a budget:

1. Navigate to the Proposal Workspace. You will automatically be brought to the Workspace when you select **Finish** on the Proposal SmartForm.
2. On the Proposal Workspace, under the Budgets tab, select the **budget name** to display the Budget Workspace.



Draft Mouse Models of Human Cancer FP00000247 Funding Proposal

Next Steps

- Edit Funding Proposal
- Printer Version
- COI Disclosure Status
- Submit For Department Review
- Certify
- Withdraw Proposal
- Manage Ancillary Reviews
- Create/Update SF424
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget

Proposal Information

PD/PI: Tom Bivens (pi2)
 Department: Radiology
 Specialist: Ava Lambert
 Sponsors: National Cancer Institute
 Sponsor Submission Deadline: 2/5/2022
 Internal Submission Deadline:
 Certified: No
 SF424 Link:

Budget Information

Starting Date: 12/1/2022
 Number of Periods: 5
 Total Direct: \$0
 Total Indirect: \$0
 Total: \$0

SF424 Link Workflow:

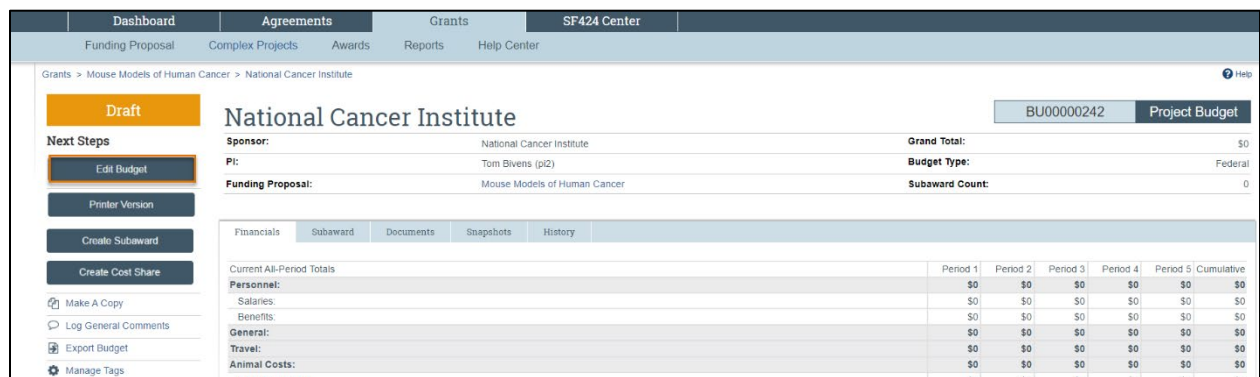
```

  graph LR
    Draft --> Dept[Department Review]
    Dept --> Spec[Specialist Review]
    Spec --> Sponsor[Sponsor Review]
    Sponsor --> Complete
    Dept --> Clar1[Clarification Requested]
    Spec --> Clar2[Clarification Requested]
    Sponsor --> Changes[Changes Required]
  
```

Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
National Cancer Institute	[Edit]	1/26/2022 9:42 AM	Draft	Federal	\$0	yes

3. On the Budget Workspace, select the **Edit Budget** button to open the Budget SmartForm.



Draft National Cancer Institute BU00000242 Project Budget

Next Steps

- Edit Budget
- Printer Version
- Create Subaward
- Create Cost Share
- Make A Copy
- Log General Comments
- Export Budget
- Manage Tags

Sponsor: National Cancer Institute **Grand Total:** \$0
PI: Tom Bivens (pi2) **Budget Type:** Federal
Funding Proposal: Mouse Models of Human Cancer **Subaward Count:** 0

Financials Subaward Documents Snapshots History

Current All-Period Totals	Period 1	Period 2	Period 3	Period 4	Period 5	Cumulative
Personnel:	\$0	\$0	\$0	\$0	\$0	\$0
Salaries:	\$0	\$0	\$0	\$0	\$0	\$0
Benefits:	\$0	\$0	\$0	\$0	\$0	\$0
General:	\$0	\$0	\$0	\$0	\$0	\$0
Travel:	\$0	\$0	\$0	\$0	\$0	\$0
Animal Costs:	\$0	\$0	\$0	\$0	\$0	\$0

4. Complete the Budget SmartForm pages to build the budget in RAMP. The subsections below walk you through each of the pages. Select **Continue** at the bottom of each page to navigate through the SmartForm pages (the final page has a Finish button instead of a Continue button).

3.2.1 [General Budget Information Page](#)

1. Budget title – Edit the display name of the budget to better identify the sponsor or the budget's content if necessary. (Example: an internal subproject title should be edited to reflect the receiving division/department name.)

2. Principal Investigator for this budget – This drop-down list contains only the names of those identified in the key personnel section of the proposal. Update as necessary. If the person is not listed, they will need to be added in the Personnel section of the proposal SmartForms to be selectable here.

3. Does this budget use the standard F&A cost base and rates? – Select **Yes** if this budget will use the On-Campus Research F&A cost base and rates. Select **No** if the budget will use a different rate.


If **Yes**, the Standard On Campus Research F&A cost base and rates display in the table.

3. * Does this budget use the standard research indirect cost base and rates? ?


Yes No [Clear](#)


Standard F&A cost base and rates

	Period	1	2	3	4	5
F&A Cost Base	Start:	7/1/2024	7/1/2025	7/1/2026	7/1/2027	7/1/2028
	End:	6/30/2025	6/30/2026	6/30/2027	6/30/2028	6/30/2029
MTDC	Rate:	55.5%	55.5%	55.5%	55.5%	55.5%

If **No**, a second **Non-standard F&A cost base and rates** table displays to specify a different cost rate (if appropriate). When entering rates, enter the value in the first field and use the arrow button  to duplicate the value in all periods. Select the appropriate F&A cost base.

- None – Use when no indirect costs are calculated in the F&A base.
- TDC – Use when all budget categories are calculated in the F&A base, including NIFA proposals.
- MTDC – Use when the sponsor uses a modified total direct cost F&A base.
- S&W – Use when the sponsor specifies a salaries & wages F&A cost base.
- S&B – Use when the sponsor specifies a salaries & fringe benefits F&A cost base.
- S&S – Do not use.
- FEL – Do not use.
- NIH Training Grant – Use for NIH NRSA and similar training grants.

 **Note:** UW-Madison will not use the FEL or S&S cost bases.

3. * Does this budget use the standard research indirect cost base and rates? 


Yes No [Clear](#)

Standard F&A cost base and rates

	Period	1	2	3	4	5
F&A Cost Base	Start:	7/1/2024	7/1/2025	7/1/2026	7/1/2027	7/1/2028
	End:	6/30/2025	6/30/2026	6/30/2027	6/30/2028	6/30/2029
MTDC	Rate:	55.5%	55.5%	55.5%	55.5%	55.5%


Non-standard F&A cost base and rates

	Period	1	2	3	4	5	
F&A Cost Base	Start:	7/1/2024	7/1/2025	7/1/2026	7/1/2027	7/1/2028	
	End:	6/30/2025	6/30/2026	6/30/2027	6/30/2028	6/30/2029	
TDC	Rate:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Clear"/>

 **Important:** RAMP does not allow a user to enter an indirect cost budget dollar value. If the proposal limits the indirect costs to a specific dollar value, calculate the necessary percentage to recover all costs and enter the relevant percentage.

4. Will you require detailed budget tables for this budget submission?


- Select **Yes** if you need a detailed budget for either Travel or Participant support costs. Select **No** if you will enter Travel or Participant Support costs as a line item on the General Costs page or if your budget does not contain these budget categories.
- Use the guidance below to determine if a Yes answer is appropriate.
 - **Detailed Travel Budget:** Select YES when you prefer to build a detailed travel budget based on the number of travelers and number of trips per period or when the sponsor requires detailed travel budgeting. Select NO if you prefer to enter your travel budget in a lump sum amount or if your budget does not include travel costs.
 - **Detailed Participant Support Costs Budget:** This cost type maps to Section E on NIH SF424 budget pages and is for Participant Costs. Select YES for pre- and post-doctoral individual fellowships or when the R&R budget includes participant support costs (located in Section E of the budget form). Select NO for training grants, budgets that do not include participant support costs, or if you prefer to enter participant support costs in a lump sum amount.
- If selecting Yes, refer to the [Appendix](#) to this guide for the detailed instructions for these additional SmartForm pages.

 **Notes:** Selecting Yes adds additional budget SmartForm pages to the overall set of SmartForm pages. Selecting No does not add additional budget SmartForm pages and users would instead add these costs to the General Costs page (this page is included for all budgets).

5. Include in consolidated budgets? – Select **Yes** or **No** as appropriate.

- If **Yes**, the budget will be included in the total proposal budget displayed in the Financials tab of the Proposal Workspace.
- If **No**, the budget will be excluded from the total proposal budget displayed in the Financials tab of the Proposal Workspace. Select No if

this is a draft budget that will not be used on the final proposal or if this is a cost share budget.

 **Notes:** Selecting Yes adds this budget's totals to the figures on the proposal's Financials tab. The totals of all budgets (except cost share or excluded budgets) get rolled up into one total per cost type on the SF424 budget.

6. Salary Cap – This field may be automatically populated with the sponsor's salary cap. You can override the default salary cap by entering a new amount. Follow sponsor guidelines for salary caps. Salary cap overages do not need a cost share budget unless they are being reported to the sponsor as part of mandatory cost share.

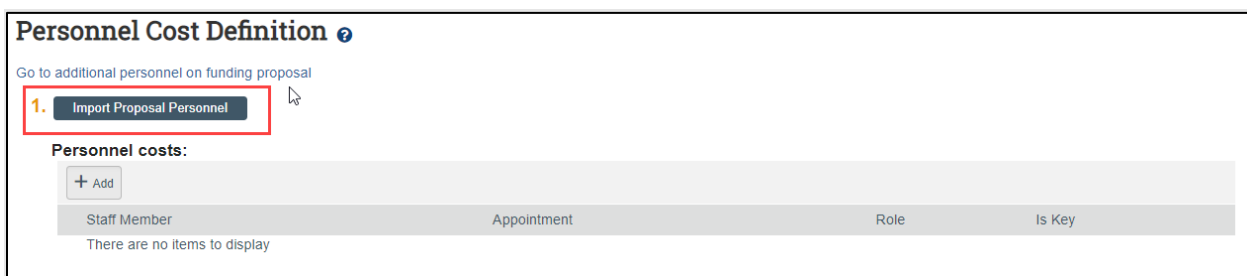
7. Apply inflation rate to personnel costs? – This question defaults to "Yes." Update as necessary. If you intend to apply inflation to salary costs for individuals at the salary cap, you will need to remove the salary cap in Question 6; otherwise, no inflation will occur in future years.

8. Enter inflation rates – Update as necessary with the inflation rate for each budget category. Select the **Inflate Period 1** box to apply the inflation rate to Period 1; otherwise, inflation will start with Period 2.

3.2.2 [Personnel Cost Definition Page](#)

The personnel cost budget is calculated using information entered on two separate pages. This first page, Personnel Cost Definition, is for entering costs. The second page, Personnel Costs, is for entering amounts. The personnel budget also displays on the Personnel Costs page.

Follow the steps below to build the list of personnel:



1. Select the **Import Proposal Personnel** button to import the PI and all other institutional personnel listed on the proposal at one time. **This action can only be completed once.**
 - a. If needed, select the **Go to additional personnel on funding proposal** link to return to the Personnel page of the Proposal SmartForm to add additional personnel to the proposal prior to using the Import Personnel button. When complete, navigate back to the Personnel Costs page of the Budget SmartForm and select the Import Proposal Personnel button.
2. If you need to add a person after you have completed the import, you will manually add them using the “Add” button and then select their name from the dropdown. Select the **Add** button to add personnel individually.
3. Select **Update** by each staff member name to view appointment and base salary information. Update if necessary.
4. Use the “Staff Member to Be Determined” value if the position is being budgeted, but the individual has not yet been identified.

Add Personnel Cost

1. **Staff member:**

2. *** Role:**

If "Other (Specify)" selected, enter the role below:

3. **Appointment:**

4. *** Budget summer and academic effort separately?**
 Yes No [Clear](#)

5. **Annualized salary:**

6. **Apply inflation rate:**
 Yes No [Clear](#)

When complete, each row of the table reflects the Appointment duration, Role, and whether the individual is Senior/Key Personnel.

Personnel Cost Definition [e](#)

[Go to additional personnel on funding proposal](#)

1. **Personnel costs:**

+ Add		Staff Member	Appointment	Role	Is Key	
Update	Test PI (2)		12 months	PD/PI	yes	✕
Update	Staff Member To Be Determined		12 months	Graduate Student	no	✕
Update	Staff Member To Be Determined		12 months	Graduate Student	no	✕

3.2.3 [Personnel Costs Page](#)

This page consists of a Budget Summary table and a Personnel Costs table that contains a row for everyone listed on the prior page, which includes their salary, benefits costs, and total compensation.

- i. Select the **Show Effort** button to show fields used to indicate the percentage of effort everyone will contribute to the project and the percent of the base salary required.

Personnel Costs						
Budget Summary						
	Period 1 7/1/2024 6/30/2025	Period 2 7/1/2025 6/30/2026	Period 3 7/1/2026 6/30/2027	Period 4 7/1/2027 6/30/2028	Period 5 7/1/2028 6/30/2029	Budget Totals
Personnel Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Personnel Costs						
<input type="button" value="Show Effort"/>	Period 1 7/1/2024 6/30/2025	Period 2 7/1/2025 6/30/2026	Period 3 7/1/2026 6/30/2027	Period 4 7/1/2027 6/30/2028	Period 5 7/1/2028 6/30/2029	
Person: Test PI (2) Role: PD/PI	Salary: Benefits: Total:	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Person: Staff Member To Be Determined Role: Graduate Student	Salary: Benefits: Total:	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Person: Staff Member To Be Determined Role: Graduate Student	Salary: Benefits: Total:	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Salary Cost Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Benefits Cost Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Personnel Cost Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- ii. Enter the applicable **Effort** and **Salary Requested (Sal Req)** months and modify the **Fringe Benefits Rate** if necessary. If you expect these values to remain consistent across all periods, select the **small arrows** to copy the values to the subsequent periods.

Personnel Costs						
<input type="button" value="Save"/>	Period:	Period 1 7/1/2023 6/30/2024 Duration: 12.00	Period 2 7/1/2024 6/30/2025 Duration: 12.00	Period 3 7/1/2025 6/30/2026 Duration: 12.00	Period 4 7/1/2026 6/30/2027 Duration: 12.00	Period 5 7/1/2027 6/30/2028 Duration: 12.00
Person: Test PI (1) Role: PD/PI	Effort Mos.:	1.8	1.8	1.8	1.8	1.8
	Sal Req Mos.:	1.8	1.8	1.8	1.8	1.8
	FB Rate:	36.6 %	36.6 %	36.6 %	36.6 %	36.6 %
	Annualized Sal.:	\$250,000.00	\$250,000.00	\$250,000.00	\$250,000.00	\$250,000.00
	Monthly Rate:	\$20,833.33	\$20,833.33	\$20,833.33	\$20,833.33	\$20,833.33

- iii. Repeat this process for all personnel. When complete, select the **Save** to update the totals fields in both the Budget Summary and Personnel Costs tables.



General Notes about the Personnel Costs table:

- Use the Show Effort/Show Totals buttons to switch between the effort and dollar amount views.
- The Base salary is defined for each person on the Personnel Cost Definition page.
- $\text{Salary} = \text{Base} * \text{Sal Req \%}$ (salary cap used instead of base if applicable)
- $\text{Benefits} = \text{Base} * \text{Sal Req \%} * \text{FB Rate \%}$ (salary cap used instead of base if applicable)
- The Effort months and effort percentage reflects the effort for each person in the period and does not impact the calculations on the table (salary requested impacts the calculations as noted above).
- If the base salary is greater than the salary cap amount, the calculations will use the salary cap. UW-Madison does not require cost share budgets to be created for salary cap overage alone.

[3.2.4 Travel Cost Definition and Travel Costs Pages](#)

This page appears if you entered Yes to travel costs on Question 4 (Will you require detailed budget tables for this budget submission?) on the General Budget Information page.

Refer to the [appendix](#) to this guide for instructions for these pages.

[3.2.5 Trainee Cost Definition and Trainee Cost Pages](#)

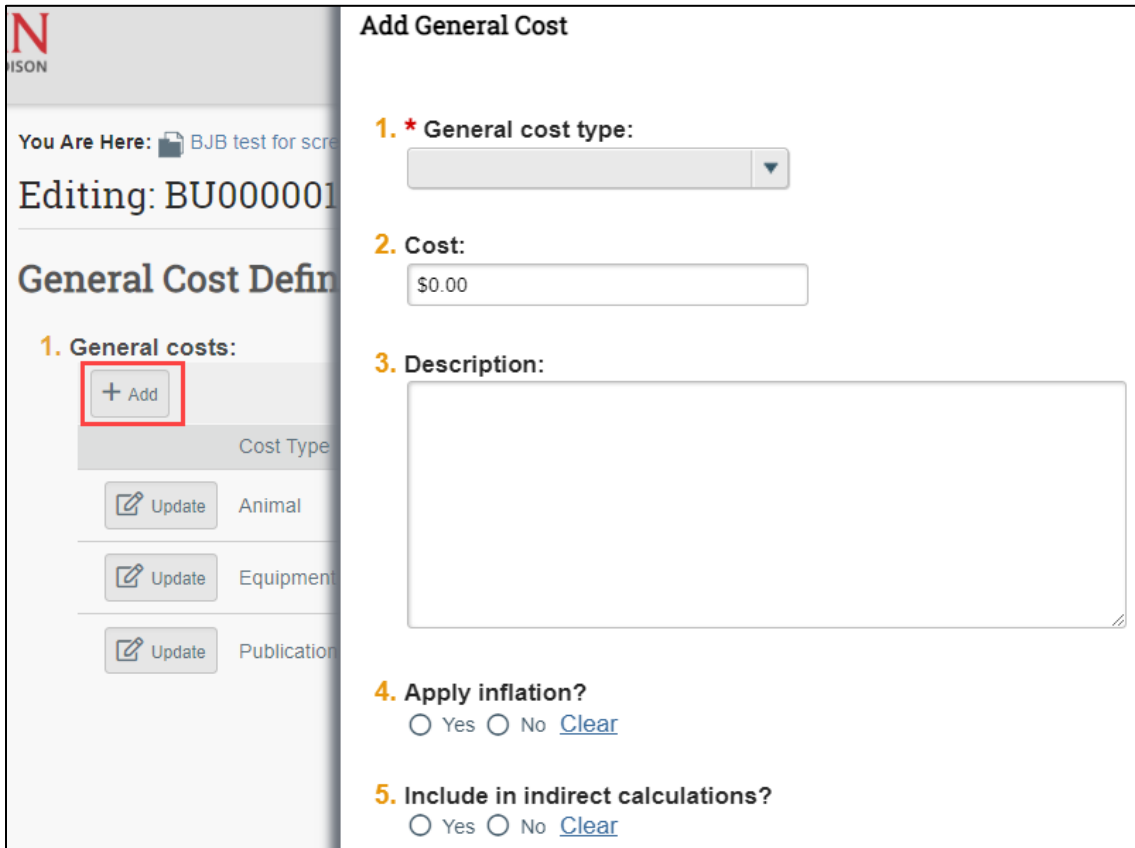
This page appears if you entered Yes to participant support costs on Question 4 (Will you require detailed budget tables for this budget submission?) on the General Budget Information page. The terms participant support costs and trainee costs are interchangeable in RAMP and in this guide.

Refer to the [appendix](#) to this guide for instructions for these pages.

[3.2.6 General Cost Definition Page](#)

On this page you'll enter line items for cost categories not entered on the detailed budget tables on prior pages. Like the Personnel Costs pages, the General Cost tables consist of two pages. The first page, General Cost Definition, is for entering cost line items by general cost type. The second page, General Costs, is for updating the costs in all budget periods to calculate the total general costs.

- i. **General costs** – Select the **Add** button to add a new cost type and repeat as necessary.



Add General Cost

1. * General cost type:

2. Cost:

3. Description:

4. Apply inflation?
 Yes No [Clear](#)

5. Include in indirect calculations?
 Yes No [Clear](#)

In the Add General Cost window, answer the following questions:

1. **General cost type** – Select the type in the drop-down list.
2. **Cost** – Enter the dollar amount per period.
3. **Description** – Enter additional information about the cost type.

4. **Apply inflation?** – Answer **Yes** or **No**. By answering **No**, the amounts will be editable on the next page. If answering **Yes**, this will apply inflation rate entered on the General Information page (even if 0% is entered) and future year budget amounts are not editable.
5. **Include in indirect calculations?** - Answer **Yes** or **No**. This question only displays for certain cost types. Do not change default answer unless sponsor solicitation/guidelines specifically require change. Default answers are driven by the indirect cost base.

When complete, select **OK** or **OK and Add Another**.

General Cost Definition


1. General costs:

Cost Type	Description	Cost	
<input type="button" value="Update"/>	Animal	\$9,000.00	<input type="button" value="✕"/>
<input type="button" value="Update"/>	Consultant Services	\$5,000.00	<input type="button" value="✕"/>
<input type="button" value="Update"/>	Materials and Supplies	\$25,000.00	<input type="button" value="✕"/>

3.2.7 [General Costs Page](#)

This page consists of a Budget Summary table and a General Costs table that contains a row for each cost type listed on the prior page. Notice that the costs with inflation factored in are automatically promoted across all budget periods.

1. Select the **hyperlink** associated with each Cost Type to edit the Cost Type and the associated details listed for each Cost Type.
2. Select the **Save** button within the General Costs table after you have completed your edits.

 **Note:** The general cost dollar amounts shown below (Cost Type “Animal” and “Equipment”) are editable because the “Apply inflation?” question in the Add General Cost window was answered as “no.”

General Costs						
Budget Summary						
	Period 1 1/1/2024 12/31/2024	Period 2 1/1/2025 12/31/2025	Period 3 1/1/2026 12/31/2026	Period 4 1/1/2027 12/31/2027	Period 5 1/1/2028 12/31/2028	Budget Totals
General Total:	\$47,000.00	\$47,000.00	\$47,000.00	\$47,000.00	\$47,000.00	\$235,000.00
Direct Total:	\$47,000.00	\$47,000.00	\$47,000.00	\$47,000.00	\$47,000.00	\$235,000.00
Indirect Total:	\$19,425.00	\$19,425.00	\$19,425.00	\$19,425.00	\$19,425.00	\$97,125.00
Grand Total:	\$66,425.00	\$66,425.00	\$66,425.00	\$66,425.00	\$66,425.00	\$332,125.00
General Costs						
	Period 1 1/1/2024 12/31/2024	Period 2 1/1/2025 12/31/2025	Period 3 1/1/2026 12/31/2026	Period 4 1/1/2027 12/31/2027	Period 5 1/1/2028 12/31/2028	
Cost Type: Animal Description:	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
Cost Type: Equipment Description: microscope	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00
Cost Type: Materials and Supplies Description:	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00
General Cost Total:	\$47,000.00	\$47,000.00	\$47,000.00	\$47,000.00	\$47,000.00	\$47,000.00

3. Enter any notes about the general costs in Question 1 and select **Continue.**

3.2.8 [F&A Cost Overrides Page](#)

No data entry. **This page is for RSP use only.** This page reports the F&A cost base standard being used to calculate the F&A amount for this budget and if

F&A Cost Overrides ?

1. **F&A cost base:**
MTDC
2. * **Personnel salary:**
No override
3. * **Personnel benefits:**
No override
4. * **General cost:**
No override

applicable, any overrides. RSP would use this page in the rare circumstance that a sponsor used a F&A base that is not already available in RAMP.

3.2.9 [Attachments Page](#)

Attach the budget justification (if not an SF424 submission) and other internal budget attachments here. Attachments added here will also be available on the Funding Proposal Workspace. These attachments are not imported to the SF424; all SF424 budget attachments must be directly uploaded in the SF424 record. When the Budget SmartForm is complete, select the **Finish** button to return to the Budget Workspace.

On the Budget Workspace, the Financials tab reflects the categories and totals specified on the budget tables. Select the **Edit Budget** button to make additional budget updates.



DHHS, PHS, NATIONAL INSTITUTES OF HEALTH BU00000316 Project Budget

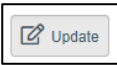
Sponsor: DHHS, PHS, NATIONAL INSTITUTES OF HEALTH Grand Total: \$96,376
 PI: Buffy Beattie Budget Type: Federal
 Funding Proposal: BB Short Title fo FP#1 script Subaward Count: 1

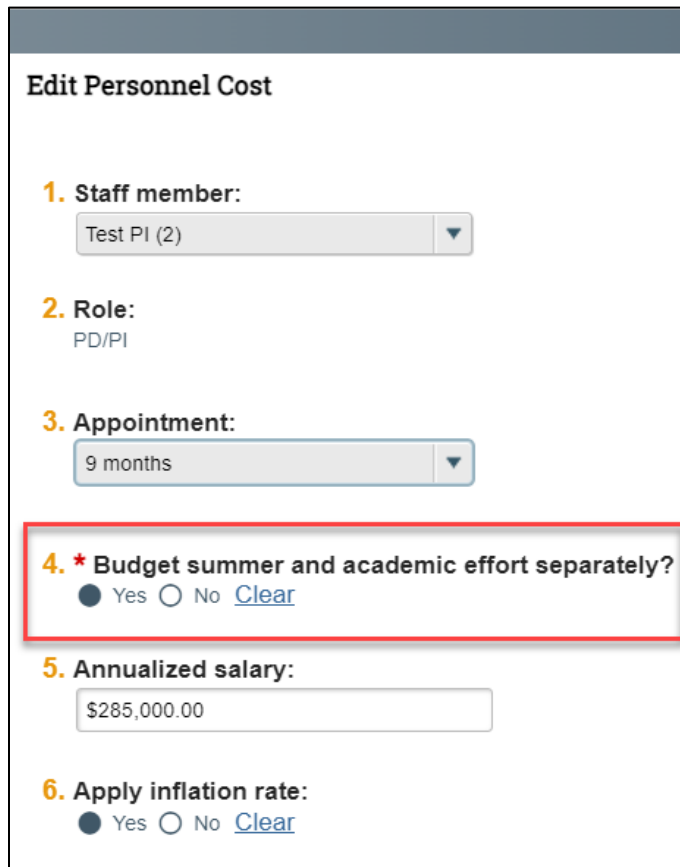
Current All-Period Totals	Period 1	Period 2	Period 3	Period 4	Period 5	Cumulative
Personnel:	\$0	\$0	\$0	\$0	\$0	\$0
Salaries:	\$0	\$0	\$0	\$0	\$0	\$0
Benefits:	\$0	\$0	\$0	\$0	\$0	\$0
General:	\$0	\$0	\$0	\$0	\$0	\$0
Travel:	\$0	\$0	\$0	\$0	\$0	\$0
Animal Costs:	\$0	\$0	\$0	\$0	\$0	\$0

3.2.10 [How to Input Academic and Summer Salary Faculty](#)

No special data entry is needed. RAMP maps personnel with both academic and summer salary to one line so the person does not need to be listed on two lines on the SF424 budget. Salaries are loaded to RAMP from the UW-Madison human resources system and salaries for personnel with academic year appointments is annualized to allow the salary calculations for academic and summer salary to be correct.

RAMP allows separate budgeting for summer and academic effort. Follow the steps below to separate summer and academic effort:

1. Navigate to the Personnel Cost Definition page of the budget.
2. Select **Update**  next to the name of the staff member requiring separate summer and academic effort budgeting.
3. In the Edit Personnel Cost window, select **Yes** to Question 4 “Budget summer and academic effort separately” and select **OK** to close the window.



4. Repeat the process for additional personnel as needed.
5. The Personnel Costs page will now include data entry fields to capture summer and academic effort separately.

Personnel Costs

Budget Summary

Period:	Period 1	Period 2	Period 3	Budget Totals
Start:	7/1/2023	7/1/2024	7/1/2025	
End:	6/30/2024	6/30/2025	6/30/2026	
Duration:	12.00	12.00	12.00	
Personnel Total:	\$64,543.00	\$64,543.00	\$64,543.00	\$193,629.00
Direct Total:	\$64,543.00	\$64,543.00	\$64,543.00	\$193,629.00
Indirect Total:	\$35,821.00	\$35,821.00	\$35,821.00	\$107,463.00
Grand Total:	\$100,364.00	\$100,364.00	\$100,364.00	\$301,092.00

Personnel Costs

	Period 1	Period 2	Period 3
Start:	7/1/2023	7/1/2024	7/1/2025
End:	6/30/2024	6/30/2025	6/30/2026
Duration:	12.00	12.00	12.00
SM Effort Mos.:	2	2	2
SM Sal Req Mos.:	2	2	2
AY Effort Mos.:	0.6	0.6	0.6
AY Sal Req Mos.:	0.6	0.6	0.6
FB Rate:	36.6 %	36.6 %	36.6 %
Annualized Sal.:	\$285,000.00	\$285,000.00	\$285,000.00
Monthly Rate:	\$23,750.00	\$23,750.00	\$23,750.00

Person: Test PI (2)
Role: PD/PI

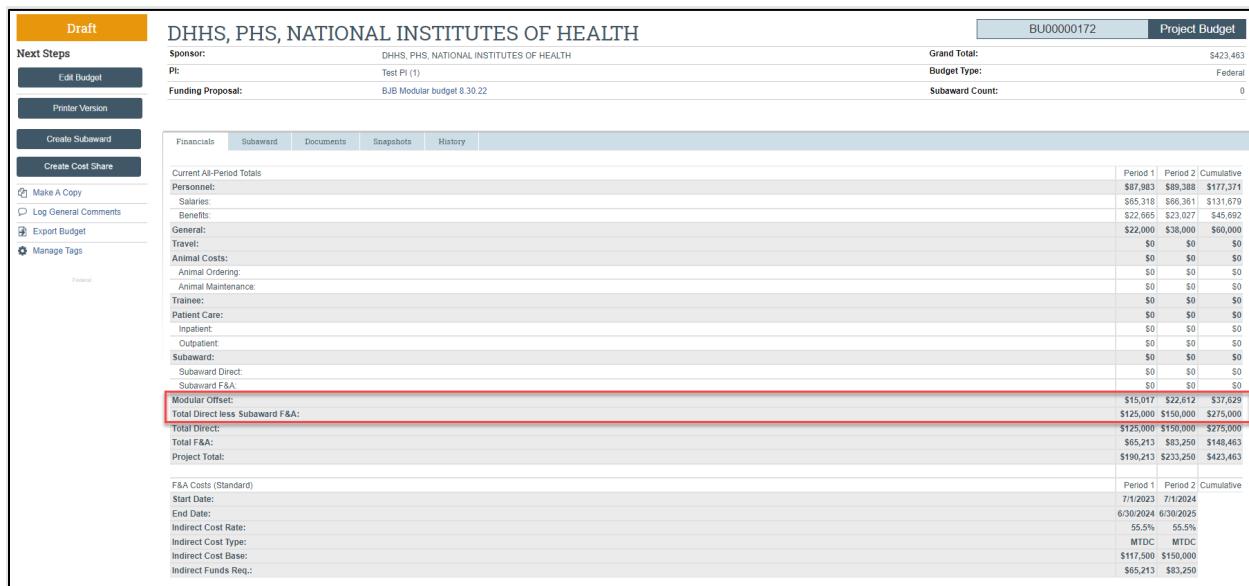
3.2.11 How to Create a Modular Budget

To submit a modular budget to a sponsor, you must select **Yes** to Question 6 “Modular Budget?” on the Funding Proposal SmartForm (Budget Periods and Key Dates page). A modular budget uses the same Budget SmartForm as a detailed budget; however, you will use the PHS Modular Budget form on your SF424 application instead of the Research & Related Budget (detailed budget) form. [SF424 directions](#) (if applicable) are included later in this guide.

Follow the steps below to complete the budget for a submission with a modular budget.

1. Complete the Budget SmartForm using the steps in outlined in the [How to Complete a Budget](#) section. Enter Personnel and General Costs that will be necessary to complete the project. The system will round each budget period to the nearest module (increment of \$25,000) using a “modular offset”, so it is not necessary to create a detailed budget that adds up exactly to the target modular amount.

2. When the Budget SmartForm is complete, select the **Finish** button to return to the Budget Workspace.
3. If your budget is over the target direct cost increment, select the **Edit Budget** button to reduce the direct costs to obtain the desired total. If the listed “Total Direct less Subaward F&A” correctly reflects the desired number of modules in each budget period, the budget will map correctly to the SF424 modular budget. The image below shows the budget category totals that combine with a modular offset to add to the desired module amount.



The screenshot shows the 'Draft' stage of a budget for 'DHHS, PHS, NATIONAL INSTITUTES OF HEALTH'. The 'Next Steps' sidebar includes buttons for 'Edit Budget', 'Printer Version', 'Create Subaward', and 'Create Cost Share'. The main table displays budget details for 'BU00000172' with a 'Project Budget' of \$423,483. The 'Financials' tab is active, showing a table of budget categories. A red box highlights the 'Modular Offset' and 'Total Direct less Subaward F&A' rows, which show values of \$15,017 and \$125,000 for Period 1, \$22,612 and \$150,000 for Period 2, and a cumulative total of \$37,629 and \$275,000 respectively.


Category	Period 1	Period 2	Cumulative
Current All-Period Totals			
Personnel:	\$87,963	\$89,388	\$177,351
Salaries:	\$55,318	\$56,351	\$111,670
Benefits:	\$32,645	\$33,037	\$65,682
General:	\$22,000	\$38,000	\$60,000
Travel:	\$0	\$0	\$0
Animal Costs:	\$0	\$0	\$0
Animal Ordering:	\$0	\$0	\$0
Animal Maintenance:	\$0	\$0	\$0
Trainee:	\$0	\$0	\$0
Patient Care:	\$0	\$0	\$0
Inpatient:	\$0	\$0	\$0
Outpatient:	\$0	\$0	\$0
Subaward:	\$0	\$0	\$0
Subaward Direct:	\$0	\$0	\$0
Subaward F&A:	\$0	\$0	\$0
Modular Offset:	\$15,017	\$22,612	\$37,629
Total Direct less Subaward F&A:	\$125,000	\$150,000	\$275,000
Total Direct:	\$125,000	\$150,000	\$275,000
Total F&A:	\$65,213	\$83,250	\$148,463
Project Total:	\$190,213	\$233,250	\$423,463

3.2.12 [How to Create an Additional Budget](#)


Additional budgets may need to be created for the proposal submission. Follow the steps below to create an additional budget:

1. Navigate to the Proposal Workspace.
2. On the Proposal Workspace, select the **Create Additional Budget** activity.
3. In the Create Additional Budget window, enter the **Budget title** and the associated **PI Name** and select **OK**.

4. On the Budget Workspace, complete the pages as necessary. Reference [How to Complete a Budget](#) for additional information.

 **Note:** Consider creating additional budgets for the following scenarios:

- Multiple departments or divisions
- Multiple projects or PD/PIs
- Estimate budgets (be careful to select whether to include in consolidated budgets)
- Additional sponsor budget requirements (e.g., by fiscal year)

 **Important:** The modular offset is calculated for each budget, not on the rollup level or aggregate budget. For this reason, it is not recommended to use multiple budgets for submissions with a modular budget.

3.2.13 [Cost Share Budgeting](#)

RAMP supports cost share budgeting and UW-Madison will use RAMP's cost share budgeting feature for those proposals that include cost sharing. The University of Wisconsin – Madison Cost [Sharing Policy](#) states “Generally, the university's policy is to minimize institutional and third-party cost sharing on sponsored projects.” For this reason, cost share budgets will not be common in RAMP and the instructions for [creating a Cost Share Budget](#) are contained in the [Appendix](#) to this guide.

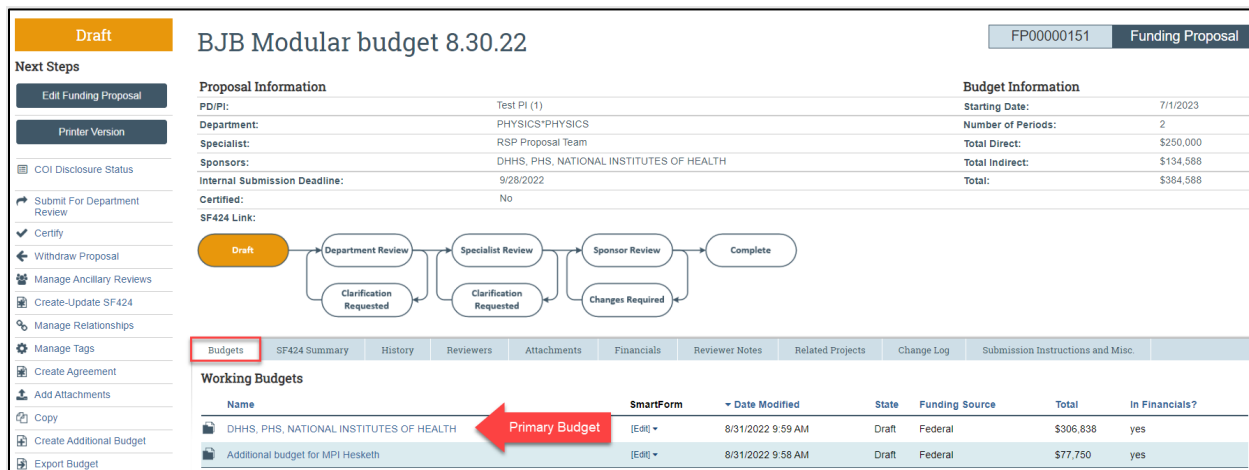
3.2.14 [How to Create an External Subaward Budget](#)

Subaward budgets are necessary to account for funds when contracting an external institution for a specific scope of work as part of the research project. Subaward budgets can only be created after the primary budget associated with the proposal has been created.

Follow the steps below to create a subaward budget:

1. Navigate to the Proposal Workspace.

2. On the Proposal Workspace, under the Budgets tab, select the **primary budget** name to display the Budget Workspace.



Next Steps

- Edit Funding Proposal
- Printer Version
- COI Disclosure Status
- Submit For Department Review
- Certify
- Withdraw Proposal
- Manage Ancillary Reviews
- Create-Update SF424
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget

Proposal Information

PD/PI: Test PI (1)
 Department: PHYSICS*PHYSICS
 Specialist: RSP Proposal Team
 Sponsors: DHHS, PHS, NATIONAL INSTITUTES OF HEALTH
 Internal Submission Deadline: 9/28/2022
 Certified: No
 SF424 Link:

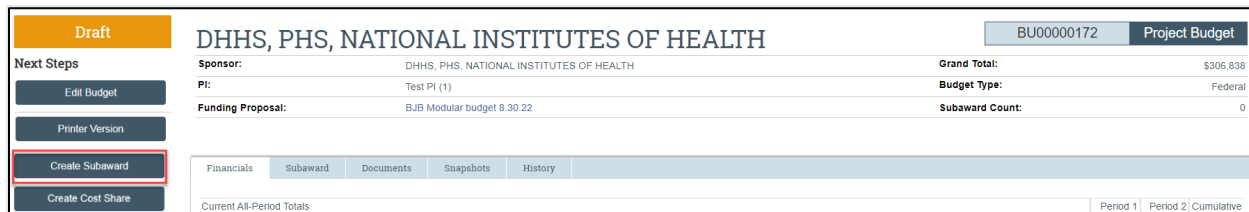
Budget Information

Starting Date: 7/1/2023
 Number of Periods: 2
 Total Direct: \$250,000
 Total Indirect: \$134,588
 Total: \$384,588

Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	[Edit]	8/31/2022 9:59 AM	Draft	Federal	\$306,838	yes
Additional budget for MPI Hesketh	[Edit]	8/31/2022 9:58 AM	Draft	Federal	\$77,750	yes

3. On the Budget Workspace, select the Create Subaward button.



Next Steps

- Edit Budget
- Printer Version
- Create Subaward**
- Create Cost Share

Financials | Subaward | Documents | Snapshots | History


Current All-Period Totals | Period 1 | Period 2 | Cumulative

4. Complete the Subaward SmartForm pages. The subsections below walk you through each of the pages. When finished with each page, select Continue to navigate through the rest of the SmartForm pages.

- a. Subaward Budget Information page


- i. **1. Title** – enter a descriptive name for the subaward (50 character maximum). For example, identify the subrecipient or the budget's content.
- ii. **2. Subrecipient**– enter the subrecipient’s name. The list is populated from the list of sponsors. If the subrecipient name is not listed, complete the [Add Sponsor Information](#) form on the RSP website to initiate the addition process.
- iii. **3. Principal Investigator** – no data entry. This field automatically populates with the primary budget’s PI.

- iv. **4. Subawardee PI** – enter the Subrecipient PI’s information.
- v. **5. Subaward budget detail level** – select how to capture budget data for this subaward.
 1. **Per Period Direct and Indirect totals** – all costs are captured in a single budget table as per-period direct and indirect totals. If submitting via S2S, SF424 may still require subaward budget details to be entered manually in the SF424 Workspace.
 2. **SF424 Subaward Import** – allows you to upload the subrecipient’s budget totals from a completed R&R Subaward Budget PDF form. (You do this on the SF424 Subaward Import page, which appears later in the SmartForm. The information from the uploaded R&R Subaward Budget PDF will map to the SF424.) A SF424 R&R Budget for specific proposal package will be available for download after you initiate the SF424 Workspace.
 - a. Select this option when submitting your proposal system-to-system (RAMP to Grants.gov).
 - b. The PDF form must be opened with Adobe Acrobat (not a web browser) to edit it. You must use the PDF version associated with the opportunity (which can be downloaded from the SF424 Workspace). Using older form versions may result in error.
 - c. The period dates entered in the Subaward R&R Budget PDF form must match the budget periods of the primary budget.

 **Important:** You must use the PDF version associated with the opportunity (which can be downloaded from the SF424

Workspace). Using or downloading the wrong form will cause submission errors.

- vi. **6. Include in consolidated budgets?** – select **Yes** to include this subaward budget in the final application budget that is to be submitted to the sponsor. Select **No** if this budget should be excluded from the final application budget.
- vii. **7. Subaward indirect allowance limit** – by default, RAMP includes the first \$25,000 of subaward budgets in the cost base for calculating F&A costs for the primary budget for MTDC budgets. However, you can change this value.

 **Note:** This question appears only if the cost base type selected in the parent budget is MTDC.

- b. All Personnel Page: **Do not use this section.** Subrecipient key personnel should be entered on the funding proposal.
- c. Per Period Cost Totals page (displayed only if this option was selected on the first page).
 - i. Enter the **Direct** and **Indirect** costs as necessary and use the arrows to promote the same values to the subsequent periods.

Per Period Cost Totals

Total Direct:				\$100,000
Total Indirect:				\$55,000
Total Project:				\$155,000
	Period	1	2	
	Start:	7/1/2023	7/1/2024	
	End:	6/30/2024	6/30/2025	
Cost Totals			Total	
Direct:		\$100,000	\$0.00	\$100,000
Indirect:		\$55,000	\$0.00	\$55,000
Grand Total:		\$155,000	\$0.00	\$155,000

1. Budget notes:

- ii. The totals at the top of the table will update as data is entered. Enter applicable notes in the text field by Question 1.

Per Period Cost Totals

Total Direct:				\$200,000
Total Indirect:				\$110,000
Total Project:				\$310,000
	Period	1	2	
	Start:	7/1/2023	7/1/2024	
	End:	6/30/2024	6/30/2025	
Cost Totals			Total	
Direct:		\$100,000	\$100,000	\$200,000
Indirect:		\$55,000	\$55,000	\$110,000
Grand Total:		\$155,000	\$155,000	\$310,000

1. Budget notes:

Enter budget notes in this field


- d. SF424 Subaward Import Page (displayed only if this option was selected on the first page).

- i. To import, select your SF424 Subaward PDF and select **Save**. The totals from the form will be loaded in the system.

SF424 Subaward Import

1. To import, select your SF424 Subaward PDF click Save. The totals from the form will be loaded in the system.

- e. Attachments Page: **Do not use this page.**
 - i. Attach all documentation using the Add Attachment activity on the Proposal Workspace.
 - ii. When the subaward budget is complete, select the **Finish** button. You are returned to the Subaward Workspace.

 **Important:** The budget periods entered on this PDF form must match the budget periods on the primary budget.

 **Notes:**

- The editable PDF subaward budget form is available on the SF424 Workspace within the system or on the Grants.gov website.
- Subaward budgets are displayed under the Subaward tab of the Budget Workspace.

4 How to Manage a SF424 Submission for Federal Proposals

If you selected to submit your proposal by system-to-system on the [Submission Information page](#) of the Proposal SmartForm, you must also create the applicable SF424 forms and populate them with data from the Proposal and Budget SmartForms.

4.1 How to Create the SF424

Follow the steps below to create the SF424 record:

1. On the Funding Proposal Workspace, select the **Create-Update SF424** activity. The Create-Update SF424 window appears.

Draft
BJB Modular budget 8.30.22

FP00000151


Funding Proposal

Next Steps

- [Edit Funding Proposal](#)
- [Printer Version](#)
- [COI Disclosure Status](#)
- [Submit For Department Review](#)
- [Certify](#)
- [Withdraw Proposal](#)
- [Manage Ancillary Reviews](#)
- [Create/Update SF424](#)
- [Manage Relationships](#)
- [Manage Tags](#)
- [Create Agreement](#)
- [Add Attachments](#)
- [Copy](#)
- [Create Additional Budget](#)
- [Export Budget](#)
- [Send Email](#)
- [Manage Access](#)
- [Add Comment](#)

Proposal Information

PD/PI:	Test PI (1)	Budget Information	Starting Date:	7/1/2023
Department:	PHYSICS*PHYSICS	Number of Periods:	2	
Specialist:	RSP Proposal Team	Total Direct:	\$250,000	
Sponsors:	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	Total Indirect:	\$134,588	
Internal Submission Deadline:	9/28/2022	Total:	\$384,588	
Certified:	No			
SF424 Link:				



Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	Submission Instructions and Misc.
Working Budgets									
Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?			
Cost Sharing for DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	[Edit]	8/31/2022 12:53 PM	Draft	Institution (Internal)	\$36,233	no			
DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	[Edit]	8/31/2022 9:59 AM	Draft	Federal	\$306,838	yes			
Additional budget for MPI Hesketh	[Edit]	8/31/2022 9:58 AM	Draft	Federal	\$77,750	yes			

3 items < page 1 of 1 >

- In the Create-Update SF424 window, select the appropriate SF424 forms that you will need for your submission, then select **OK**. The "Status" column will update as the system generates the forms. When all the forms have been created, a "Success!" message displays at the bottom to indicate your SF424 record has been created.

Important:

- The applicable optional forms must be selected. Select the appropriate budget forms for all applications that include a budget.
- If this is the first time this activity is being executed, select **OK** to create the SF424 application. If this is not the first time this activity is being executed, be aware that selecting **OK** will override any manual changes made in the SF424 form to previously mapped data.
- You have the option to select only the form that needs to be updated.

October 2023

page 43

Create-Update SF424

WARNING: Selecting "OK" below will **override** any manual changes previously made directly in an already created SF424 form. Do not use this activity if you are making a correction requested by a specialist.

If this is the first time this activity is being executed, select "OK" and this activity will create your SF424 application.

If this is not the first time this activity is being executed, selecting "OK" will override any manual changes made in the SF424 form.

Select "Cancel" if you do not wish to execute this activity.

<input type="checkbox"/> Action	Status
<input checked="" type="checkbox"/> Research And Related Other Project Information V1.4	
<input checked="" type="checkbox"/> PHS 398 Research Plan V4.0	
<input checked="" type="checkbox"/> Project/Performance Site Location(s) V4.0	
<input checked="" type="checkbox"/> PHS Human Subjects and Clinical Trials Information V3.0	
<input checked="" type="checkbox"/> SF424 (R & R) V5.0	
<input checked="" type="checkbox"/> PHS 398 Cover Page Supplement V5.0	
<input checked="" type="checkbox"/> Research & Related Senior/Key Person Profile (Expanded) V4.0	
<input checked="" type="checkbox"/> PHS 398 Modular Budget V1.2	
<input type="checkbox"/> Research & Related Subaward Budget Attachment(s) Form 5 YR 30 ATT V3.0	
<input type="checkbox"/> PHS Assignment Request Form V3.0	
<input type="checkbox"/> Research & Related Budget V3.0	

4.2 How to Edit and Complete the SF424

Follow the steps below to edit and complete the SF424 record:

1. Once the system has generated the SF424 forms, select the **SF424 Link** on the Proposal Workspace.

Draft
BJB Modular budget 8.30.22

FP00000151


Funding Proposal

Next Steps

- [Edit Funding Proposal](#)
- [Printer Version](#)
- [COI Disclosure Status](#)
- [Submit For Department Review](#)
- [Certify](#)
- [Withdraw Proposal](#)
- [Manage Ancillary Reviews](#)
- [Create/Update SF424](#)
- [Manage Relationships](#)

Proposal Information

PD/PI:	Test PI (1)
Department:	PHYSICS*PHYSICS
Specialist:	RSP Proposal Team
Sponsors:	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH
Internal Submission Deadline:	9/28/2022
Certified:	No
SF424 Link:	SF-42400000063



Budget Information

Starting Date:	7/1/2023
Number of Periods:	2
Total Direct:	\$250,000
Total indirect:	\$134,588
Total:	\$384,588

2. On the SF424 Workspace, select the **Edit Grant Application** button.

Pre-Submission
BJB Modular budget 8.30.22

SF-42400000063

SF424

Next Steps

- [Edit Grant Application](#)
- [Printer Version](#)
- [Validate Submission](#)
- [Generate PDF Version](#)
- [Assign Editors and Readers](#)
- [Log Comment](#)
- [Import Subaward Budget](#)
- [Import Project Budget](#)

Descriptive Title: BJB Modular budget 8.30.22

Submission Type: New

PDF Version(s): Not Available. Please execute Generate PDF Version activity

Agency

Tracking Number:

Grant

Tracking Number:

Received Date/Time:

Status Updated:

Principal Investigator: PI (1), Test

Authorized Representative: Egan, Brenda

Contact Person: EGAN, BRENDA

Start Date: 7/1/2023

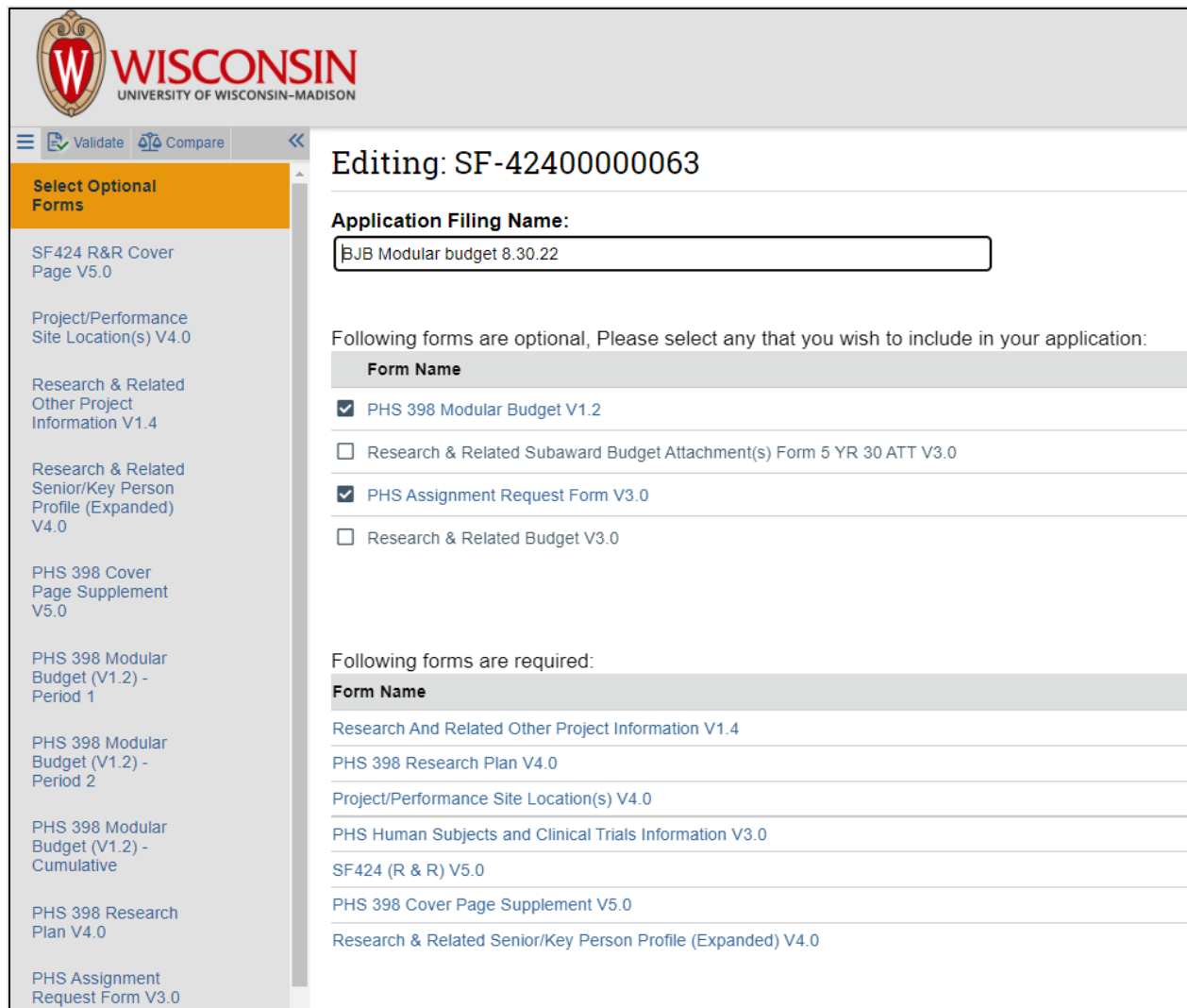
End Date: 6/30/2025

FOA: PKG00075077/PA-GN-R21(FOA00000006)

Parent Project: FP00000151

Date Modified: 9/1/2022 12:53 PM

3. On the Select Optional Forms page of the SF424 SmartForm, select any optional forms to include in the SF424 application and select **Continue** to move to the sponsor-specific pages.



WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

Validate Compare

Editing: SF-42400000063

Application Filing Name:
BJB Modular budget 8.30.22

Following forms are optional, Please select any that you wish to include in your application:

Form Name
<input checked="" type="checkbox"/> PHS 398 Modular Budget V1.2
<input type="checkbox"/> Research & Related Subaward Budget Attachment(s) Form 5 YR 30 ATT V3.0
<input checked="" type="checkbox"/> PHS Assignment Request Form V3.0
<input type="checkbox"/> Research & Related Budget V3.0

Following forms are required:

Form Name
Research And Related Other Project Information V1.4
PHS 398 Research Plan V4.0
Project/Performance Site Location(s) V4.0
PHS Human Subjects and Clinical Trials Information V3.0
SF424 (R & R) V5.0
PHS 398 Cover Page Supplement V5.0
Research & Related Senior/Key Person Profile (Expanded) V4.0

Select Optional Forms

- SF424 R&R Cover Page V5.0
- Project/Performance Site Location(s) V4.0
- Research & Related Other Project Information V1.4
- Research & Related Senior/Key Person Profile (Expanded) V4.0
- PHS 398 Cover Page Supplement V5.0
- PHS 398 Modular Budget (V1.2) - Period 1
- PHS 398 Modular Budget (V1.2) - Period 2
- PHS 398 Modular Budget (V1.2) - Cumulative
- PHS 398 Research Plan V4.0
- PHS Assignment Request Form V3.0

- Complete the sponsor-specific pages of the SF424 SmartForm as needed by adding or modifying data and attachments as outlined in the sponsor's instructions.

! **Important:** The pages of the SF424 SmartForm are tailored to your funding opportunity, so this guide does not cover sponsor-specific form pages.

- On the last page of the SF424 SmartForm, select **Finish** to return to the SF424 Workspace.

 **Important guidance on creating SF424 forms:**

- If a SF424 form field needs to be updated, but contains data that was automatically populated, make the necessary updates on the Funding Proposal and/or Budget SmartForm pages and use the Create-Update SF424 activity in the Workspace. If changes are made directly on the SF424 forms, the next time the “Create-Update” SF424 activity is executed, your changes will be overwritten with the values in the proposal and/or budget. Only select the forms to which you made changes when updating the SF424.
- Fields with a red asterisk (*) are required to be completed by the RAMP system. Please note that Grants.gov may require additional fields to be completed, in addition to those required by our system. When validating the SF424 SmartForm, the system will perform multiple layers of validation. You may receive additional errors or warnings on a second validation due to this approach.
- All attachments must be uploaded in PDF format and have a unique filename.

4.3 How to Import a Subaward Budget to a SF424 Application


If a subaward budget is being submitted system-to-system, the required Subaward R&R Budget form from Grants.gov must be uploaded to the submission. There are two methods to upload the Subaward R&R Budget form:

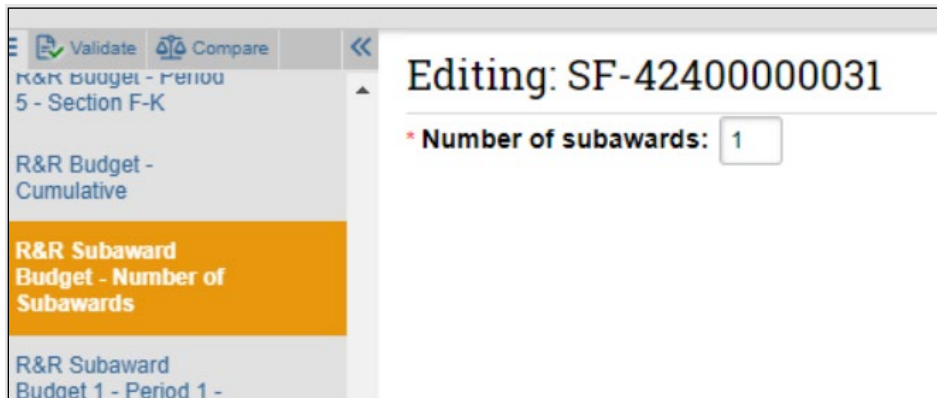
- Method 1: upload the completed Subaward R&R PDF form within the Subaward Budget SmartForm. This is the preferred method and is outlined in the [How to Create a Budget](#) section of the guide.
- Method 2: upload using the Import Subaward activity on the SF424 Workspace. The SF424 must be created before using this method.

This section provides directions for Method 2. Follow the steps below to upload a Subaward R&R Budget form to the SF424 record:


1. [Create the SF424](#) if this step has not already been completed and navigate to the SF424 Workspace.
2. On the SF424 Workspace, select the **Edit Grant Application** button.
3. On the SF424 SmartForm, update the forms as necessary and add the number of subawards on the Research & Related Subaward Budget Attachment(s) Form page. You do not need to complete the Subaward Budget SmartForm pages as this is what will be uploaded using the “Import Subaward” activity.
4. After entering the number of subawards, select the **ellipses** (or **three dots** “...”) next to each subaward to open the Add SF424RRBudget window.
5. Complete the mandatory fields in the Add SF424RRBudget window:
 - a. UEI – enter the subrecipient Unique Entity Identifier (UEI) – this UEI should match the UEI that is entered on the Subaward R&R Budget form.
 - b. Budget Type – for a subaward, select Subaward/Consortium.
 - c. Enter Name of Organization – enter the subrecipient name.

- d. Number of Budget Periods – enter the number of periods in which the subrecipient budget is active.

 **Note:** This step is required even if you have updated the R&R Subaward Budget within the Subaward Budget SmartForm pages.





6. On the SF424 Workspace, select the **Import Subaward** activity.
7. In the Import Subaward window, select a subaward for Question 1 and upload the completed Subaward R&R Budget PDF form for Question 2. Select **OK**.

 **Important:** The period dates entered in the Subaward R&R Budget PDF form must match the budget periods of the primary budget.

4.4 How to Validate a SF424 Application

RAMP can check (or validate) a SF424 application for submission errors and warnings using the validate function. Errors and warnings reflect problems (errors) and potential problems (warnings) with the SF424 application.

- Errors reflect problems that will impose a rejection at Grants.gov or the funding agency. Errors must be corrected and are designated with a red circle .
- Warnings are recommendations that will not stop proposal submission to Grants.gov but highlight situations that may cause issues when your proposal arrives at the funding agency. Certain warnings must be

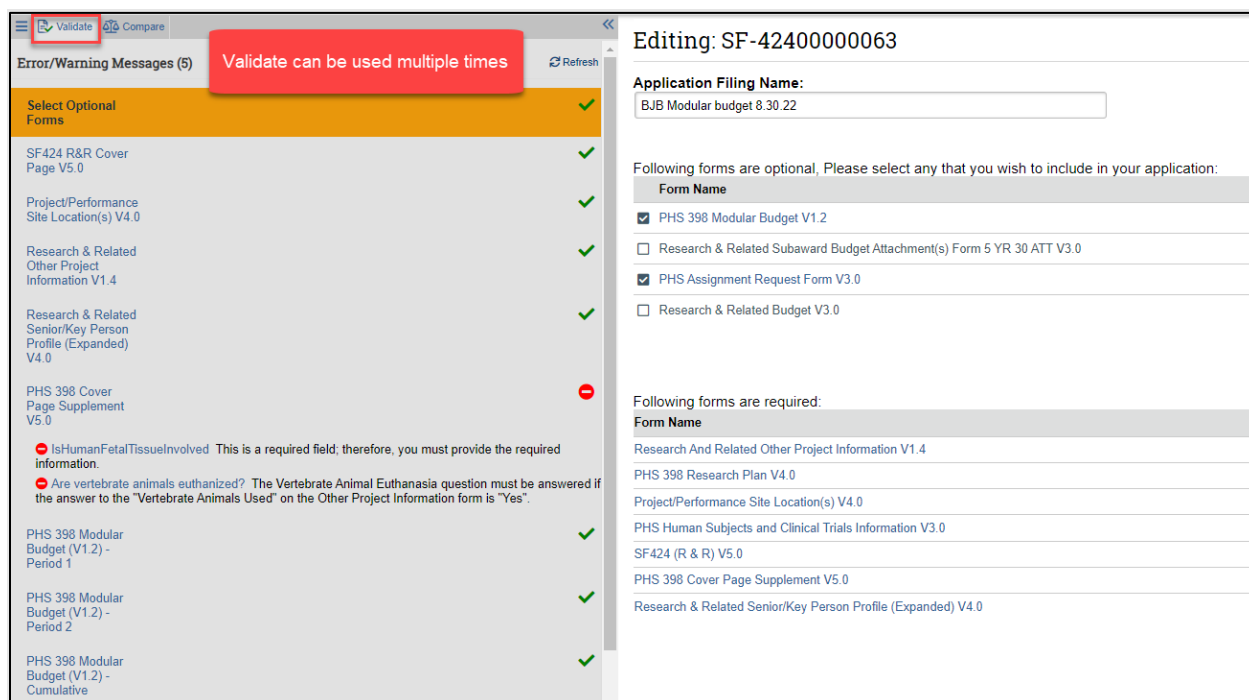
addressed to ensure compliance with sponsor guidelines. Warnings are designated with a yellow triangle .

There are two methods to check for errors and warnings:

- Method 1: Validate function within the SF424 SmartForm
 - This function should be used to check an application that is in pre-submission. This function can be used multiple times until you have resolved all errors and applicable warnings in the application.
 - This is the **only method the campus community should use** to validate the SF424.
- Method 2: Validate Submission activity on the SF424 Workspace
 - This activity also checks the SF424 application for errors and warnings. If errors or warnings appear, you can navigate back to the SF424 SmartForm to address the issues. **Campus units should not use this method.**
 - If you use this function and your SF424 passes the validate check, your SF424 application will **lock to edits** and become ready for submission to Grants.gov. For this reason, **RSP will use this activity for a final validation** when the SF424 record is ready for submission to Grants.gov.


Follow the steps below to validate your SF424 for errors and warnings:

1. On the SF424 Workspace, select the **Edit Grant Application** button to open the SF424 SmartForm.
2. On the SF424 SmartForm select the **Validate** button at the top of the left navigator panel. This button will perform a validation of your application and generate a list of errors and/or warnings if present in your application.



The screenshot displays the SF424 SmartForm interface. On the left, a sidebar lists various forms with status indicators: green checkmarks for optional forms and a red minus sign for required forms. A red callout box highlights the 'Validate' button, stating 'Validate can be used multiple times'. The main content area shows the 'Editing: SF-4240000063' form, including the 'Application Filing Name' field and sections for optional and required forms.

3. Select the **page name** or **question name** in the left navigator to navigate directly to that location within the SF424 SmartForm.
4. Re-run the validation from within the SmartForm as many times as necessary to eliminate all errors and applicable warnings.
5. Optional step. If desired, select the **Generate PDF Version** activity to save a PDF of the SF424 submission at this stage.

 **Note:** Your funding proposal and budget records should also be submitted and with RSP (or your Division for those Division with Grants.gov signature authority) for review if the SF424 is ready for submission as outlined in the [Routing a Proposal for Review](#) section of this guide.

4.5 How to Export a Subaward Budget to a Grants.gov PDF Form




When UW-Madison is a direct Grants.gov awardee, the system can generate the required SF424 forms from the data you enter in a funding proposal. Similarly, when UW-Madison is an indirect Grants.gov awardee (also known as a

subrecipient) through another institution, the system can generate the required Grants.gov subaward budget form.

Before you can export a subaward budget to a Grants.gov form, you must first ensure the funding proposal specifies both the Direct Sponsor (the organization from which UW-Madison receives project funding), and the Prime Sponsor (the Grants.gov agency that published the original Funding Opportunity Announcement and is the originating source of the project funding). Also, while not a technical requirement, it is assumed financial data has been entered into the funding proposal's budget.

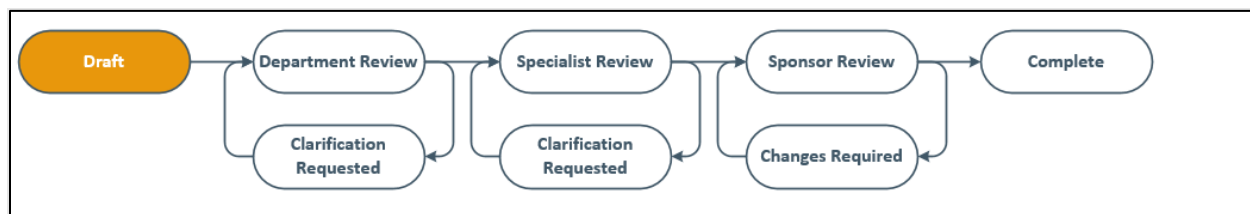
Follow the steps below to export a subaward to a Grants.gov PDF form:

1. From the Proposal Workspace, select **Export Budget to Subaward PDF**. If this activity is not listed in your Workspace, it is because you have not specified both the Direct Sponsor and the Prime Sponsor in the funding proposal.
2. On the resulting dialog box, select **OK**.
A success message indicates the PDF form has been created.
3. To view or download the completed form, select **Subaward Budget Export.pdf** on the History tab.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	Submission Instructions and Misc.
Activity								Author	▼ Activity Date
	Budget Exported to Subaward PDF						PI (1), Test	9/14/2022 1:13 PM	
Latest Subaward PDF version is available here									
	Subaward Budget Export.pdf								
	Created						PI (1), Test	9/14/2022 1:00 PM	

5 Routing a Proposal for Review

RAMP funding proposals will route (or move) through a review process (or workflow) to allow UW-Madison units and RSP to review a proposal before it is sent to a sponsor. The Proposal Workspace contains a workflow map showing where a proposal is in the workflow.



This section provides a general overview of the review workflow.

5.1 Prior to Routing a Proposal for Review

To prepare for proposal routing, review sponsor and internal deadlines and make sure there is enough time to route the proposal for review and meet the deadlines.


Follow the tips below to ensure your proposal is complete and follows UW-Madison proposal preparation guidelines:

1. Communicate the submission time and method to RSP.
 - Special instructions must be entered in Question 9 (Submission Information) on the General Proposal Information page. This includes providing information on the deadline time and method of submission (and responsible submitter if not system-to-system).
 - i. The Budget Period and Key Dates page contains the sponsor deadline and internal deadline. The SmartForm does not provide a field for the time of day the submission is due. If the proposal is due prior to 4:30 PM Central, enter the submission instructions in the Submission Information question.
 - ii. If the proposal will not be submitted with system-to-system submission, make sure the submission information is included in the comments of the proposal. RSP will need to know how the proposal will be submitted and any relevant information about the submission portal (if applicable).
2. After completing the Proposal SmartForm, budget(s), and SF424 forms (if applicable), the proposal is ready for routing.

3. Validate the SmartForms to ensure all required fields have been completed.
4. Validate the SF424 (if applicable), both within the SmartForm and using the Validate Submission activity.
5. Add [Ancillary Reviewers](#) if required.

5.2 Ancillary Review

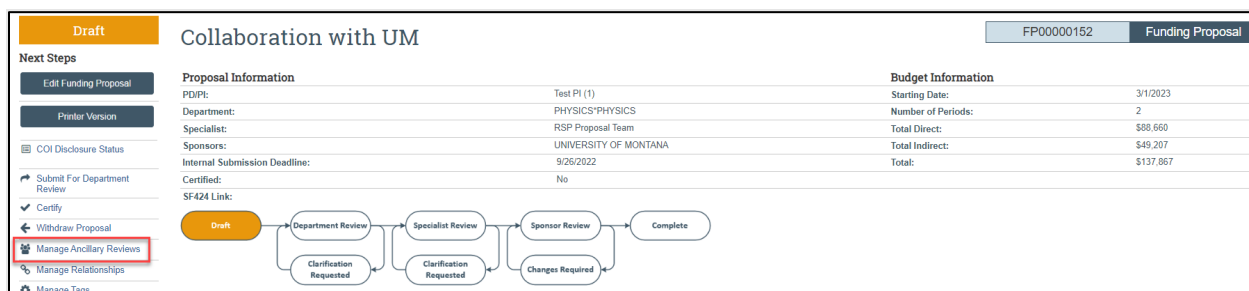
UW-Madison uses the Ancillary Review functionality to add various approvals to projects in RAMP. The directions in this section apply to Funding Proposals.

 **Tip:** Reference the Ancillary Review reference guide for general information on assigning and completing ancillary reviews. The guide also contains details on all the ancillary reviews required at UW-Madison.

5.2.1 [How to Create \(or Manage\) an Ancillary Review](#)

Follow the steps below to create and assign an ancillary review on a proposal:

1. Navigate to the appropriate Proposal Workspace.
2. In the Workspace, select **Manage Ancillary Reviews**.



Proposal Information

PDI/PI:	Test PI (1)
Department:	PHYSICS/PHYSICS
Specialist:	RSP Proposal Team
Sponsors:	UNIVERSITY OF MONTANA
Internal Submission Deadline:	9/26/2022
Certified:	No
SF424 Link:	

Budget Information

Starting Date:	3/1/2023
Number of Periods:	2
Total Direct:	\$88,660
Total Indirect:	\$49,207
Total:	\$137,867

The workflow diagram shows the following steps: Draft (orange box) → Department Review (white box) → Specialist Review (white box) → Sponsor Review (white box) → Complete (white box). There are feedback loops from Department Review, Specialist Review, and Sponsor Review back to their respective preceding steps, labeled 'Clarification Requested' and 'Changes Required'.

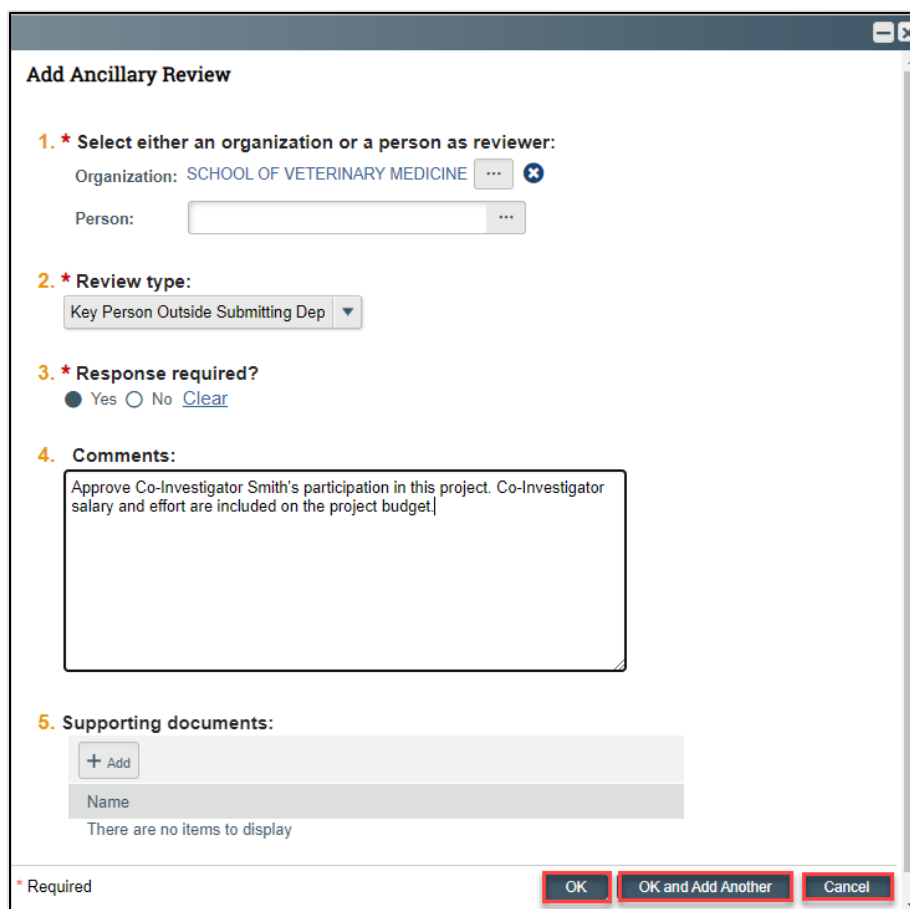
3. In the Manage Ancillary Reviews form, select **Add** .

Manage Ancillary Reviews

1. Identify each organization or person who should provide additional review.

Review Type	Org	Person	Reqd	Accepted	Notified	Comments	Docs
There are no items to display							

4. On the Add Ancillary Review form, select an organization or person to do the review (the Ancillary Review guide specifies the appropriate contact for all ancillary review types).
5. Select the Review Type, select whether this ancillary review is required, and select **OK** or **OK and Add Another to add an additional ancillary review**. Select **Cancel** to close the window and discard the information that was entered.



Add Ancillary Review

1. * Select either an organization or a person as reviewer:
Organization: SCHOOL OF VETERINARY MEDICINE ... +
Person: [input] ...

2. * Review type:
Key Person Outside Submitting Dep ▾

3. * Response required?
 Yes No [Clear](#)

4. Comments:
Approve Co-Investigator Smith's participation in this project. Co-Investigator salary and effort are included on the project budget.

5. Supporting documents:
+ Add
Name
There are no items to display

* Required

OK OK and Add Another Cancel

6. You are returned to the project Workspace. The assigned ancillary reviewer(s) receives an e-mail notification, and the project appears in the reviewer's Dashboard.

5.2.2 [How to Check the Progress of an Ancillary Review](#)

Follow the steps below to check the progress of an ancillary review:

1. Navigate to the Workspace for the project with the ancillary review you want to check.
2. Select the **Reviewers** tab.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	...
Contacts									
Name	Organization	Phone	Email						
Test PI (1)	PHYSICS*PHYSICS	608-555-1258	PI1@hurontest.com						
Reviewers									
The following people will review this proposal and provide organizational approval									
Current Step: 0									
Approval Step 1									
JOHN VARDA KELLY MALLON TERESA KIDD Test Dean Reviewer (1) SHEILA HAYDEN BREEANA HUBBARD									
Ancillary Review									
Review Type	Person	Organization	Required	Completed	Accepted				
Additional Department Review	KATHERINE MOLLEN		yes	no					
Grants Administrative Editors									
JOHN VARDA	ADMINISTRATION*ADMIN	608/890-1810	john.varda@wisc.edu						

3. Examine the Ancillary Review area at the bottom of the page to understand:

- All ancillary reviews assigned for this project.
- Whether they were assigned to individuals or organizations.
- Whether they are required.
- Whether they have been completed.
- Whether the reviews found the projects to be acceptable.

5.3 Submitting for Department Review

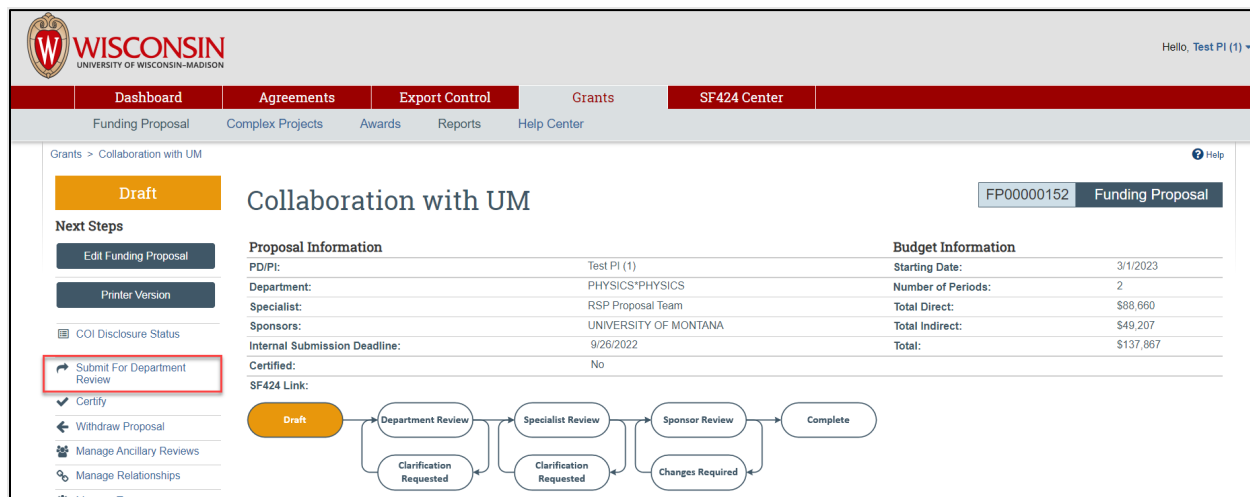


Note: RAMP uses the term “department review” to indicate the school/college/dean’s level approval that occurs before RSP review and approval. The review that is labeled as “department review” in RAMP is considered “division review” at UW-Madison.

Follow the steps below to submit a funding proposal for department review:

1. Navigate to the Workspace for the project that is ready to route for review.


2. Select the **Submit for Department Review** activity and then select **OK** on the Submit for Department Review slide-in window.



The screenshot shows the 'Collaboration with UM' funding proposal workspace. The 'Submit For Department Review' button is highlighted with a red box. Below the table, a flowchart illustrates the review process: Draft (orange) leads to Department Review, which can lead to Specialist Review or Clarification Requested. Specialist Review can lead to Sponsor Review or Clarification Requested. Sponsor Review can lead to Complete or Changes Required. Changes Required leads back to Specialist Review.

Proposal Information		Budget Information	
PD/PI:	Test PI (1)	Starting Date:	3/1/2023
Department:	PHYSICS*PHYSICS	Number of Periods:	2
Specialist:	RSP Proposal Team	Total Direct:	\$88,660
Sponsors:	UNIVERSITY OF MONTANA	Total Indirect:	\$49,207
Internal Submission Deadline:	9/26/2022	Total:	\$137,867
Certified:	No		
SF424 Link:			

3. The funding proposal transitions to the Department Review state and is no longer editable for the PI and the other listed proposal editors.
4. Optional step. To identify the assigned reviewer(s) named on a proposal, select the **Reviewers** tab on the Proposal Workspace. This tab will also tell you how many steps are required in the review process (the number of steps vary by division).

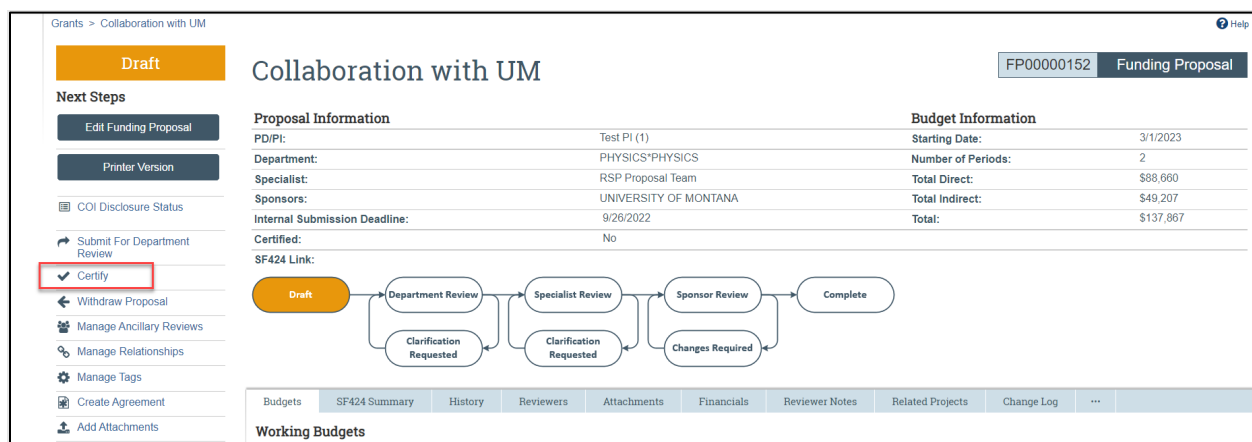
 **Note:** When the user submits for department review, an automatic notification will route to Step 1 of the reviewers listed in the Reviewers tab. Additionally, an automatic notification will route to the PI for [PI Certification](#) if the PI has not already certified the funding proposal record.

5.4 How to Complete the PI Certification Process

The PI Certify function is available to PIs in states before Pending Sponsor Review state and allows the PI to certify that the proposal meets institutional and sponsor requirements and is ready for submission. **PI certification is required for all proposals.**

Note: The PI certification process applies only to the contact PI for a multiple PI (MPI) submission. Additional UW-Madison personnel with the PI role (Multiple PI) on a proposal must certify the proposal using the Ancillary Review process. The Ancillary Review guide contains instructions for creating the MPI ancillary review. Follow the steps below to perform the PI certification:

1. Navigate to the Proposal Workspace.
2. On the Proposal Workspace, select the **Certify** activity to start the certification process.



The screenshot shows the 'Collaboration with UM' proposal workspace. The 'Next Steps' sidebar on the left has the 'Certify' button highlighted with a red box. The main content area displays 'Proposal Information' and 'Budget Information' tables, along with a process flow diagram.

Proposal Information		Budget Information	
PD/PI:	Test PI (1)	Starting Date:	3/1/2023
Department:	PHYSICS*PHYSICS	Number of Periods:	2
Specialist:	RSP Proposal Team	Total Direct:	\$88,660
Sponsors:	UNIVERSITY OF MONTANA	Total Indirect:	\$49,207
Internal Submission Deadline:	9/26/2022	Total:	\$137,867
Certified:	No		

The process flow diagram shows the following steps: Draft (orange oval) → Department Review (white oval) → Specialist Review (white oval) → Sponsor Review (white oval) → Complete (white oval). There are also feedback loops: Clarification Requested (white oval) from Department Review back to Department Review; Clarification Requested (white oval) from Specialist Review back to Specialist Review; and Changes Required (white oval) from Sponsor Review back to Sponsor Review.

3. Review the certification language, add any needed comments and attachments, and s **OK** to complete the certification.

Certify

I certify that I am the Principal Investigator (PI) on the above-referenced proposal/award and I understand that, notwithstanding any comments or attachments inserted below, by clicking on the OK button below I certify compliance with the following obligations.

I certify that I have identified all space, personnel, equipment, and budgetary needs associated with the proposal, and that the proposal/award and this record are accurate and complete in all regards, including technical matters, adherence to the sponsor's guidelines, budget, and required clearances.

I certify (1) that all the information submitted within the proposal/award is true, current, complete, and accurate to the best of my knowledge; (2) that any false, fictitious, or fraudulent statements or claims in the proposal may subject me to criminal, civil, or administrative penalties; and (3) that I accept responsibility for the scientific conduct and overall oversight of the project and to provide the required progress reports or other deliverables if an award is received as a result of the proposal.

I certify that I and all persons participating in the project, other than clerical or nontechnical persons, prior to commencing work will become familiar with the terms and conditions in the resulting agreement between the extramural sponsor and the University and will have executed the University's intellectual property certification form: <http://go.wisc.edu/bayhdole>. I certify that I have not entered, and will not in the future enter, into any agreement or other obligation to another person, company, or extramural sponsor with respect to any rights in inventions, discoveries, or copyrightable material which are in conflict with the obligations contained in the resulting agreement.

I agree that any IRB application(s) identified in this record accurately and fully describes the subject populations, subject interventions, collaborators, performance sites, and general scope of work supported by the award resulting from the above-referenced proposal and that I will not initiate any human subjects research until IRB approval is received.

I agree that I will comply with the provisions of the resulting agreement with the extramural sponsor and will cooperate in assuring that the University's obligations to fulfill those terms are met.

1. Comments:

2. Attachments:

+ Add

Name
There are no items to display

OK
Cancel

4. The activity shows in the History tab and disappears from the Proposal Workspace upon execution of the activity.

Grants > Collaboration with UM
Help

Department Review

Collaboration with UM


FP00000152
Funding Proposal

Next Steps


- View Funding Proposal
- Printer Version
- COI Disclosure Status
- Manage Ancillary Reviews
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Export Budget to Subaward PDF
- Send Email
- Manage Access
- Add Comment

Proposal Information		Budget Information	
PDI/PI:	Test PI (1)	Starting Date:	3/1/2023
Department:	PHYSICS*PHYSICS	Number of Periods:	2
Specialist:	RSP Proposal Team	Total Direct:	\$88,660
Sponsors:	UNIVERSITY OF MONTANA	Total Indirect:	\$49,207
Internal Submission Deadline:	9/26/2022	Total:	\$137,867
Certified:	Yes		

SF424 Link:



Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	...
		Activity		Author		Activity Date			
		✓ Certified		PI (1), Test		9/26/2022 2:57 PM			
		Submitted for Department Review		PI (1), Test		9/26/2022 2:27 PM			


 **Note:** The notification prompting the PI to certify will automatically be sent when the funding proposal is submitted for department review (if the PI has not already certified). Only the PI can execute the PI Certify activity, the activity will not display for other users. Users may also request PI certification outside of the automated email by using the “send email” activity in RAMP.

5.5 Department Review

Department Reviewers review the records that comprise a proposal: the funding proposal, budget(s), and if applicable, the SF424.

Below are some tips on best practices for performing and responding to a department review:

1. Review the History tab before starting a review.
2. Confirm the PI certified and the Ancillary Reviews are complete before submitting to the RSP Specialist.
3. If the Department Reviewer finds a missing Ancillary Review, they will need to add the Ancillary Review or Request Changes to have the Administrative Contact add the Ancillary Review.
4. Department Reviewers will not have the ability to add an Ancillary Reviewer unless they are listed on the proposal with edit rights.
5. After the review is complete, the Department Reviewer will either Approve or Request Changes on the proposal to keep the proposal moving in the review process.
 - a. Approve sends the proposal to the Specialist Review state (RSP review).
 - b. Request Changes sends the proposal back to the PI and the Administrative Contact (proposal preparers).




 **Note:** The proposal review and change/update process will vary among UW-Madison units. Some Department Reviewers may make changes directly to the proposal in collaboration with the PI and Administrative Contact (if

applicable) while others may send the proposal back to the Administrative Contact for requested changes.

6. The Department Reviewer will need to provide feedback when asking the PI or Administrative Contact to make changes to the proposal. Feedback to the PI and Administrative Contact can be communicated in three ways:
 - a. Through the reviewer note (comment bubble) function within the SmartForm,
 - b. On the Workspace by using the Add Comment or Send Email activities, or
 - c. When you Approve or Request Changes.

5.6 Responding to Department Review Requested Changes

Follow the steps below to respond to requested changes:

1. From the Funding Proposal Workspace, select Edit Funding Proposal.
2. Make the requested changes to the funding proposal, budget record and SF424 record (if applicable). Save all changes.
3. If responding to reviewer notes:
 - a. The left navigator will use a review note icon  to indicate if the page contains reviewer notes. Navigate to a page containing reviewer notes and select **a note icon** to open it.
 - b. Review comments marked “Response Required” require a response comment within the review note conversation. Updating the proposal to make the requested changes alone will not allow the proposal to move forward, a response to the reviewer note is also required. Select **Reply**  to open the note text box and select **OK**  to record your note reply.
 - c. Proposal attachments should not be uploaded within the reviewer note comment bubble on the SmartForm but instead by using the Add Attachments activity.

4. When updates are completed, return to the Funding Proposal Workspace and select the **Submit Changes to Department Reviewer** activity to return the updated record to the Department Reviewer.
5. The Department Reviewer will receive the proposal on their dashboard and can approve or request further changes.
6. If it is a multi-step Department Review, approving will move it to the next step in the process.
7. If only a single step Department Review, approving will move it to Specialist Review.

5.7 Specialist Review

The proposal moves to the Specialist Review state after the Department Reviewer approves the proposal. RSP performs the Specialist Review and during this review, the RSP Specialist will:

1. Review the proposal against sponsor and UW-Madison guidelines.
2. Confirm PI Certification and all required Ancillary reviews are complete.
3. Request changes if necessary and confirm all requested changes have been addressed. Changes in Specialist Review are requested as described in the [Department Review](#) section. RSP will be using Reviewer Notes in RAMP.
4. Mark the funding proposal record as Final Review using the Final Review activity.
5. Submit the proposal to the sponsor or alert the submitter that the proposal is approved for submission if RSP is not the submitter (submission information is listed on the General Proposal Information SmartForm page).


5.8 Responding to Specialist Review Requested Changes

The process for responding to Specialist Review are the same steps as described in the Responding to Department Review Requested Changes, except the proposal team is responding to the RSP Specialist instead of the Department Reviewer. As noted above, RSP will be using Reviewer Notes.

6 Post-Proposal Activities


6.1 How to Initiate a JIT Request

When a sponsor needs time-sensitive additional information that isn't part of the original application or a change to a submission, the sponsor will issue a Just-In-Time (JIT) request to either the PI, study team, or RSP. If the PI or study team receives notification that JIT information is needed, they will need to request that RSP mark the Funding Proposal as JIT Changes Required.

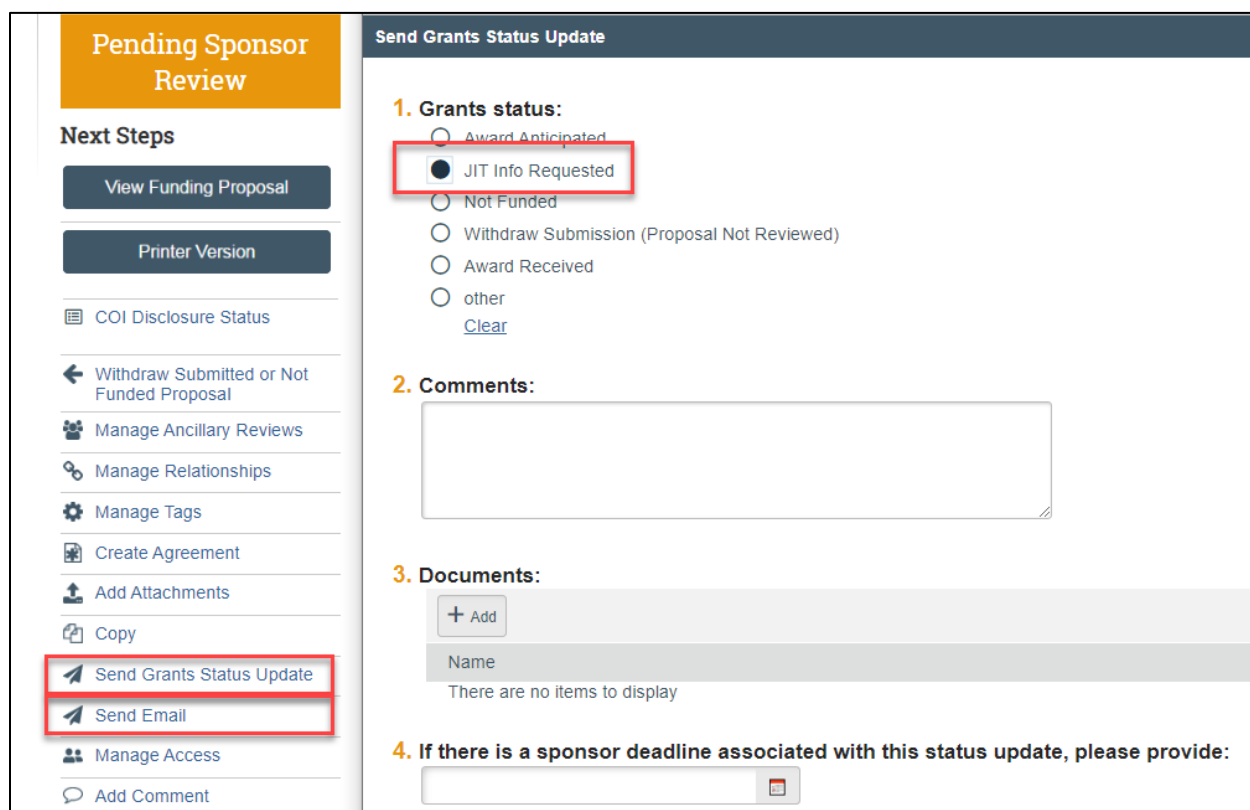
 **Note:** "JIT" is an NIH term but UW uses it for all sponsors when they request additional information before issuing an award. RAMP "JIT" should only be used for true JIT requests. This process should not be used for any post-submission material request. At UW-Madison, materials submitted after submission of the grant application but prior to initial peer review, such as Publications, Patents, Biographical Sketches, or Videos are considered non-JIT post-submission material requests.

Follow the steps below to send a JIT Changes Required request to RSP:

1. Navigate to the related funding proposal record.
2. Execute either the Send Grant Status Update activity or, if that is not an option available, the Send Email activity.

 **Note:** The Send Grants Status Update can only be used once. Additional updates on the Funding Proposal will need to be sent via the Send Email activity.

3. For the Send Grants Status Activity, fill out the pop-up form with the Grants status (select JIT Info Requested), any comments, documents, and the sponsor deadline. If the PI prepared the JIT materials and they are ready to submit, they can be uploaded here. Select **OK** to complete the update. If JIT Info Requested was selected, the funding proposal record will transition to the Proposal Status confirmation state.



6.2 How to Respond to a JIT Request

The assigned RSP Specialist will use the JIT Changes Required activity to move the proposal to the JIT Response Required state, which sends an email notification to the assigned PI and the Administrative Contact.

The RSP Specialist will complete the required steps in RAMP, in addition to submitting the JIT information directly to the sponsor. If the RSP Specialist does not need additional information from the PI or Administrative contact to complete the JIT request, the Specialist will complete the JIT request directly. If the Specialist requires additional information to complete the JIT request, the PI or Administrative Contact can respond to the Specialist in RAMP using the steps below.

Follow the steps below to respond to a JIT Request:

1. Access the proposal in one of two ways:

- a. From the system generated email, select the **“FP” link**.
 - b. Select the **proposal name** on the Dashboard or Grants Module page.
2. On the Proposal Workspace, navigate to the History tab to review the comments and/or attachments from the assigned Specialist.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	...
Activity			Author		Activity Date				
JIT Changes Requested			Beattie, Buffy		1/30/2023 10:52 AM				
Sponsor has requested human subjects training certificate and updated current & pending support.									

3. When you are ready to submit the updates to the RSP Specialist, select the **Submit JIT Response** activity on the Workspace.
4. In the JIT Changes Required window, enter any necessary comments, attach relevant document(s), and select **OK**.

JIT Response
Required

Next Steps

Edit Funding Proposal

Printer Version

- [COI Disclosure Status](#)
- [Manage Ancillary Reviews](#)
- [Manage Relationships](#)
- [Manage Tags](#)
- [Create Agreement](#)
- [Submit JIT Response](#)
- [Add Attachments](#)
- [Copy](#)
- [Update PreAward Personnel](#)
- [Export Budget](#)

Submit JIT Response

1. Comments:

Updated Current & Pending support and human subject training certificates attached.

2. Attachments:

+ Add

	Name	
	Human Subjects Training Cert.pdf(0.01)	...
	Other Support.pdf(0.01)	...

OK

Cancel

5. The system updates the proposal state to Pending Sponsor Review Award Anticipated. The proposal, including the attached JIT documents, will appear in the assigned RSP Specialist's Dashboard and RSP will also receive an email notification.
6. The RSP Specialist will then forward the JIT information to the sponsor or request additional information or changes from the PI or Administrative Contact if necessary.

6.3 How to Withdraw a Proposal or Mark as Not Funded

Proposals may be withdrawn or marked as not funded in various states throughout the workflow. Follow the steps below to withdraw a proposal or mark it as not funded:

1. On the Proposal Workspace, select the **Withdraw Submitted or Not Funded Proposal** activity.
2. In the Withdraw Submitted or Not Funded Proposal window, select **Not Funded** to change the status to Not Funded and select **Withdrawn from Sponsor** to transition the record to Withdrawn from Sponsor.
3. To close the window, select **OK**. After the system refreshes, the proposal state is updated.

Pending Sponsor Review

Next Steps

View Funding Proposal

Printer Version

COI Disclosure Status

Withdraw Submitted or Not Funded Proposal

Manage Ancillary Reviews

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

Send Grants Status Update

Send Email

Manage Access

Add Comment

Withdraw Submitted or Not Funded Proposal

1. * Reason for withdrawal:

PI Leaving Institution

Opportunity Closed Select if Not Funded

Not Funded

Withdrawn From Sponsor Select to Withdraw

Other

[Clear](#)

2. Comments:

The following reasons are for RSP use only:

- PI Leaving Institution
- Opportunity Closed
- Other

OK

Cancel

! Important:

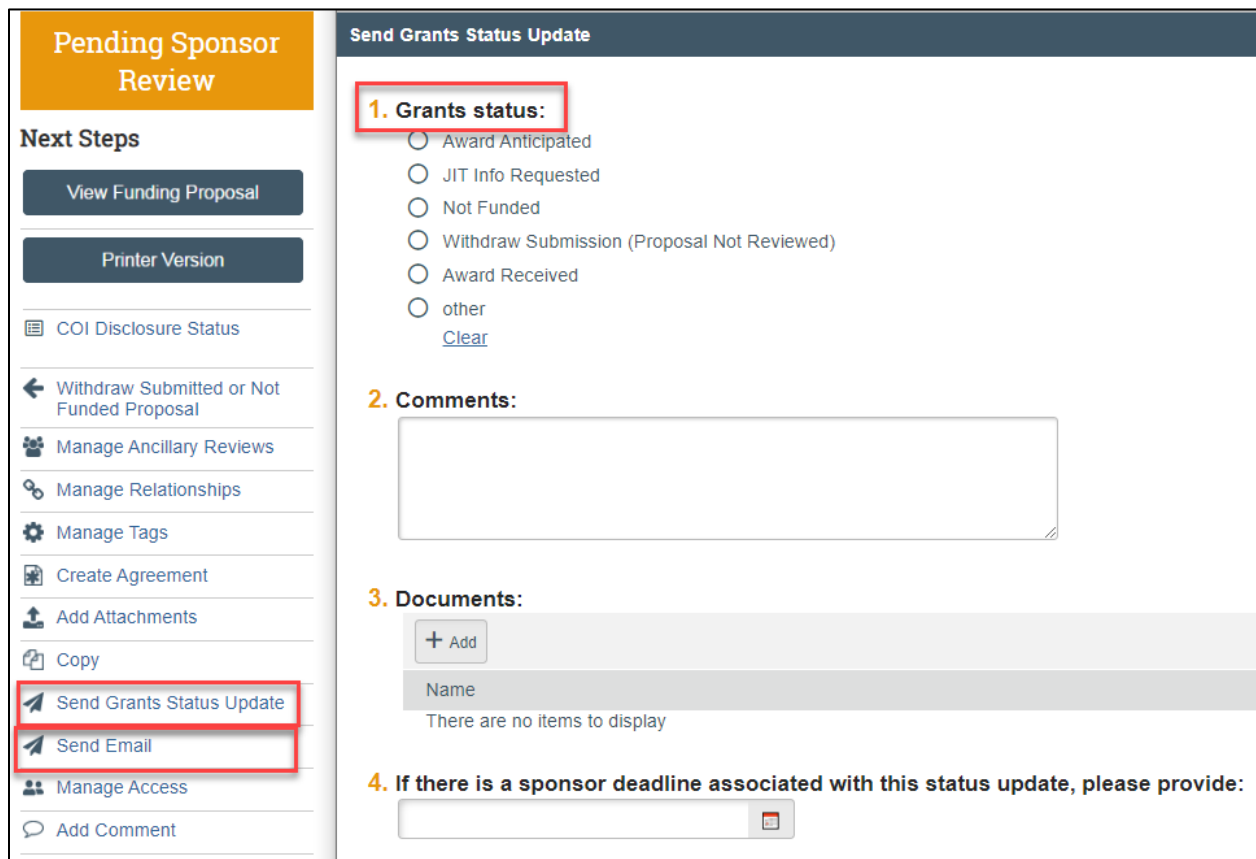
- **Withdrawn proposals cannot be reintroduced to the workflow.** A new proposal record will need to be created. Reference [How to Copy a Proposal](#) for additional information.
- Three withdrawal reasons (PI Leaving Institution, Opportunity Closed, and Other) are for **RSP use only**. Campus users should use Withdraw From Sponsor to withdraw a record.

6.4 How to Update the Proposal with the Sponsor Determination

When you receive a decision from the sponsor, you can use the proposal record to send a notification to the assigned RSP Specialist.


Follow the steps below to update the proposal with the sponsor determination:

1. On the Proposal Workspace, select the **Send Grants Status Update** activity.
2. In the Send Grants Status Update window, select the **Grant Status** that describes the determination you received. Add comments and attach relevant attachments as necessary.



The screenshot shows the 'Send Grants Status Update' interface. On the left, a sidebar under 'Pending Sponsor Review' lists 'Next Steps' including 'View Funding Proposal', 'Printer Version', and 'Send Grants Status Update' (highlighted with a red box). The main content area is titled 'Send Grants Status Update' and contains four sections: 1. 'Grants status:' with radio button options: Award Anticipated, JIT Info Requested, Not Funded, Withdraw Submission (Proposal Not Reviewed), Award Received, other, and a 'Clear' link. 2. 'Comments:' with a text input field. 3. 'Documents:' with an '+ Add' button and a table header 'Name' showing 'There are no items to display'. 4. 'If there is a sponsor deadline associated with this status update, please provide:' with a date input field.

3. When complete, select **OK**. The state is updated to Proposal Status Confirmation and an email notification is sent to the assigned RSP Specialist.
4. Based on the Grant Status and other information provided to RSP, the RSP Specialist will decide how to proceed.

 **Note:** The Send Grant Status Update activity can only be used once. If additional Grant Status updates are needed, use the [Send Email activity](#).

7 Additional Proposal Tasks

The following subsections describe how to complete additional tasks that may be necessary as the proposal submission progresses through the workflow.

7.1 How to Export the Budget

Follow the steps below to export the budget to Excel format:

1. On the Funding Proposal Workspace, select the **Export Budget** activity. Please note the budget must not contain any special characters (: \ / ? * [or]) to execute this activity.
2. After the screen refreshes, navigate to the **History** tab. The Excel file can be accessed under the Exported Budget activity.

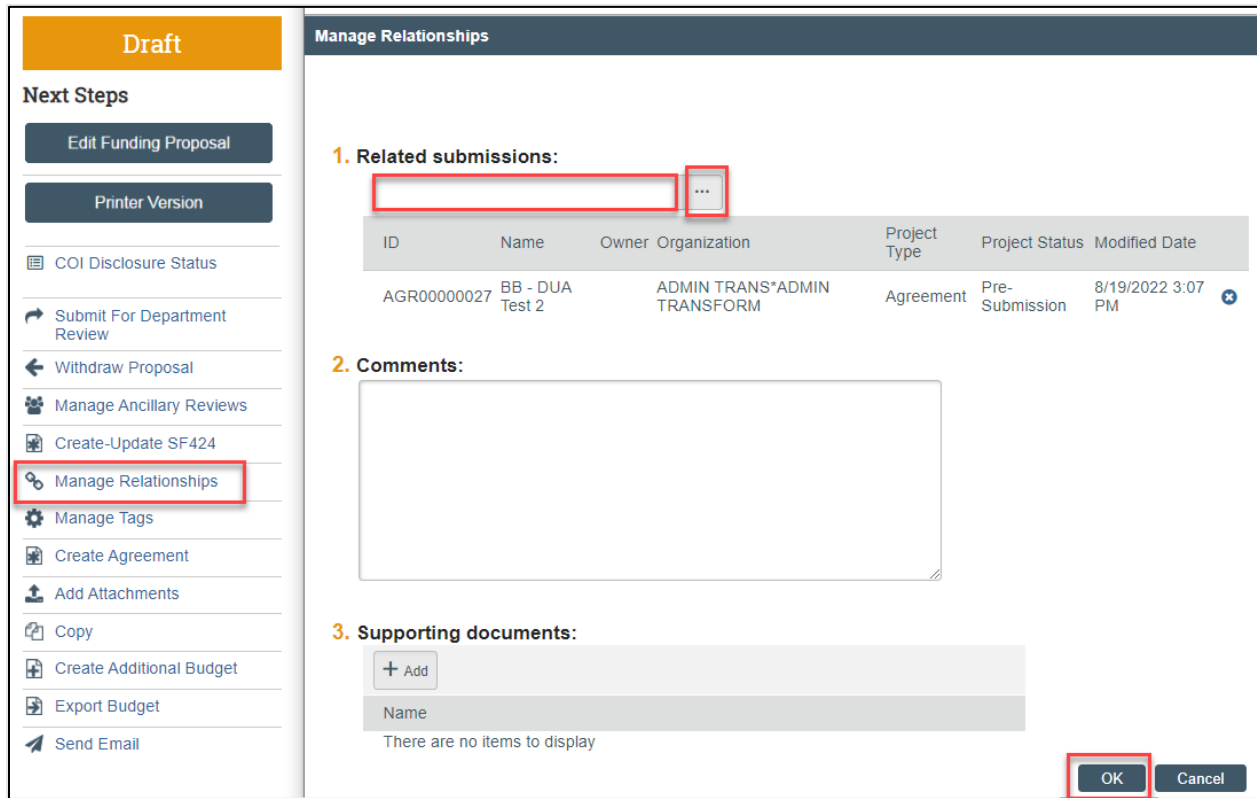
Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	...
Activity			Author			Activity Date			
Exported Budget			PI (1), Test			1/30/2023 12:11 PM			
Budget Spreadsheet_BB Short Title for FP#1 instructor script									

7.2 How to Manage Relationships

Funding proposal records can be linked to Agreements using the Manage Relationships activity.

Follow the steps below to associate a proposal with an agreement:

1. Navigate to the Proposal Workspace.
2. On the Proposal Workspace, select the **Manage Relationships** activity.



Draft

Next Steps

- Edit Funding Proposal
- Printer Version
- COI Disclosure Status
- Submit For Department Review
- Withdraw Proposal
- Manage Ancillary Reviews
- Create-Update SF424
- Manage Relationships**
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget
- Send Email

Manage Relationships

1. **Related submissions:**

Search:

ID	Name	Owner	Organization	Project Type	Project Status	Modified Date
AGR00000027	BB - DUA Test 2		ADMIN TRANS*ADMIN TRANSFORM	Agreement	Pre-Submission	8/19/2022 3:07 PM

2. **Comments:**

3. **Supporting documents:**


+ Add

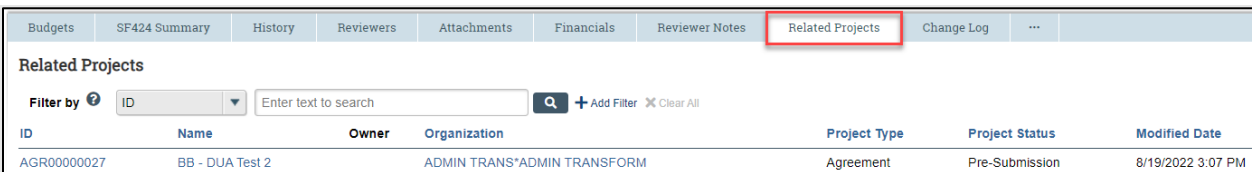
Name
There are no items to display

OK Cancel

3. In the Manage Relationships window, search for the related submission(s) you would like to link. Select the appropriate project and select **OK**.

4. When complete, select **OK**.

 **Note:** Linked Agreements are displayed on the Related Projects tab of the Workspace.



Budgets SF424 Summary History Reviewers Attachments Financials Reviewer Notes **Related Projects** Change Log ...


Related Projects

Filter by ID Enter text to search + Add Filter X Clear All

ID	Name	Owner	Organization	Project Type	Project Status	Modified Date
AGR00000027	BB - DUA Test 2		ADMIN TRANS*ADMIN TRANSFORM	Agreement	Pre-Submission	8/19/2022 3:07 PM

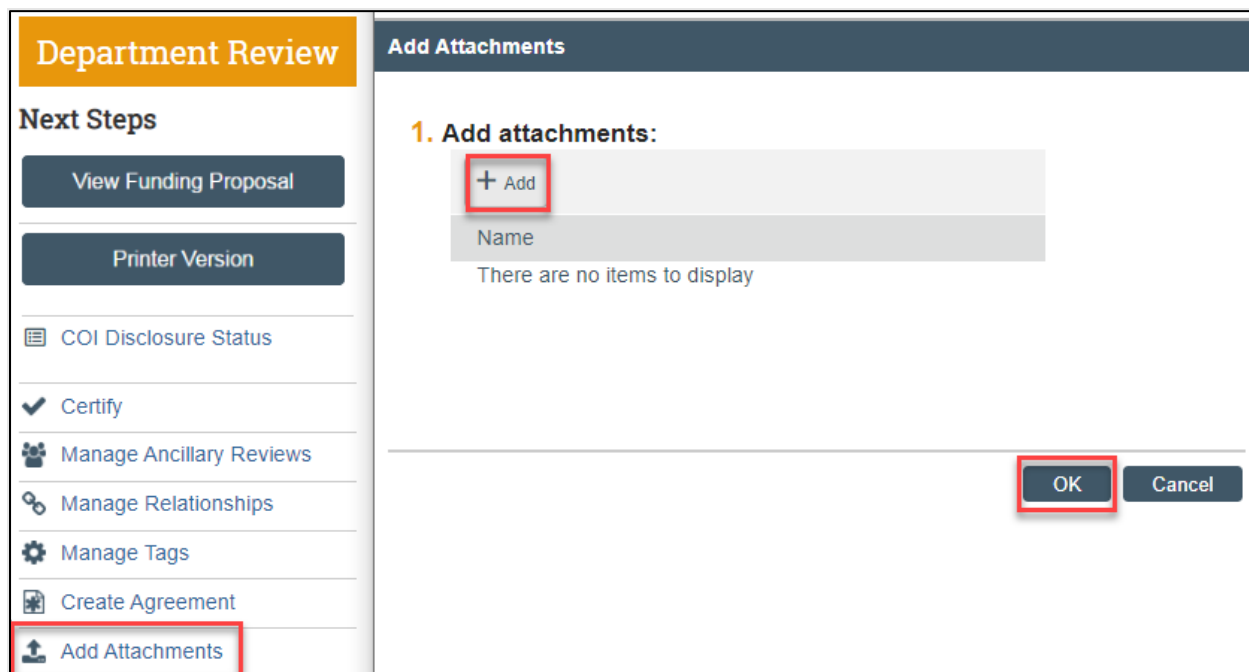
7.3 How to Add Attachments to a Proposal

The Add Attachments activity can be used to upload new or revised documents to the proposal record when the Proposal SmartForm is not editable.

 **Note:** Uploading an attachment does not send a notification that a new or updated attachment has been included with the record. Use the [Send Email](#) function if you would like to send a notification of an updated attachment.

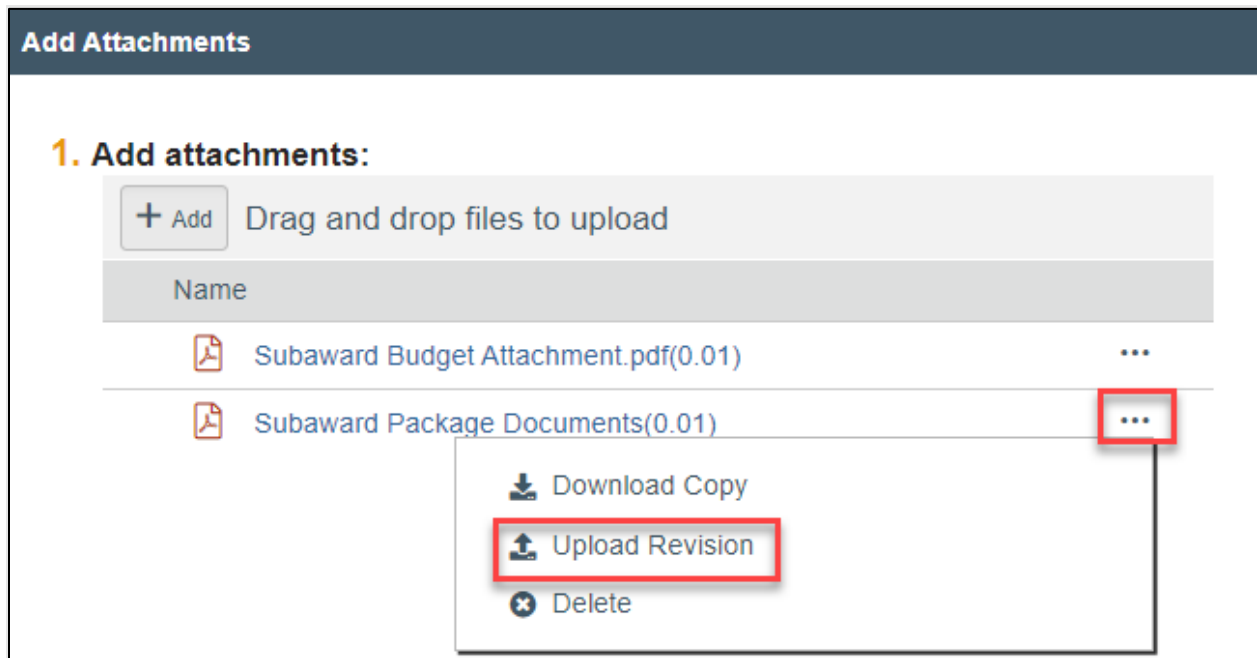
Follow the steps below to add an attachment:

1. On the Proposal Workspace, select the **Add Attachments** activity.
2. To add a new document, select the **Add** button search and select your document and select **OK**.



The screenshot shows a web interface for 'Department Review'. On the left, a sidebar lists 'Next Steps' including 'View Funding Proposal', 'Printer Version', 'COI Disclosure Status', 'Certify', 'Manage Ancillary Reviews', 'Manage Relationships', 'Manage Tags', 'Create Agreement', and 'Add Attachments' (which is highlighted with a red box). The main content area is titled 'Add Attachments' and contains the heading '1. Add attachments:'. Below this is a '+ Add' button (highlighted with a red box), a 'Name' input field, and the text 'There are no items to display'. At the bottom right of the main area are 'OK' and 'Cancel' buttons (both highlighted with red boxes).


3. To upload a revised document, select the **ellipses** (or **three dots "..."**) and select Upload Revision.



4. When complete, select **OK** to return to the Proposal Workspace.

7.4 How to Manage Access to the Proposal

The Manage Access activity is used to manage the list of individuals who have either edit or read-only access to the proposal submission. The Manage Access activity can be used to update the administrative contact and funding proposal editors and readers when the Proposal SmartForm is not editable.

 **Note:** This activity contains the same list of editors and/or readers as those listed as administrative personnel on the Personnel page of the Proposal SmartForm.

Follow the steps below to manage access to the proposal record:

1. On the Proposal Workspace, select the **Manage Access** activity.
2. In the Manage Access window, enter the individual's name or use the ellipses (or three dots "...") to search for an individual to be added as an Administrative Contact (under Question 1), editor (under Question 2) or as a reader (under Question 3).

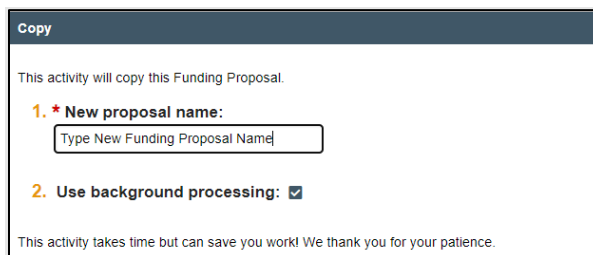
3. When complete, select **OK** to return to the Proposal Workspace.


7.5 How to Copy a Proposal

A proposal can be copied to create a new proposal, and the new proposal retains some information from the copied proposal. The new proposal will be in a Draft state until submitted for department review and must undergo the full proposal review workflow.

Follow the steps below to copy a proposal:

1. On the Proposal Workspace, select the **Copy** activity.
2. In the Copy window, enter the new proposal name (this name becomes the proposal short title) and check the **Use background processing** checkbox. When complete, select **OK** to return to the Workspace.



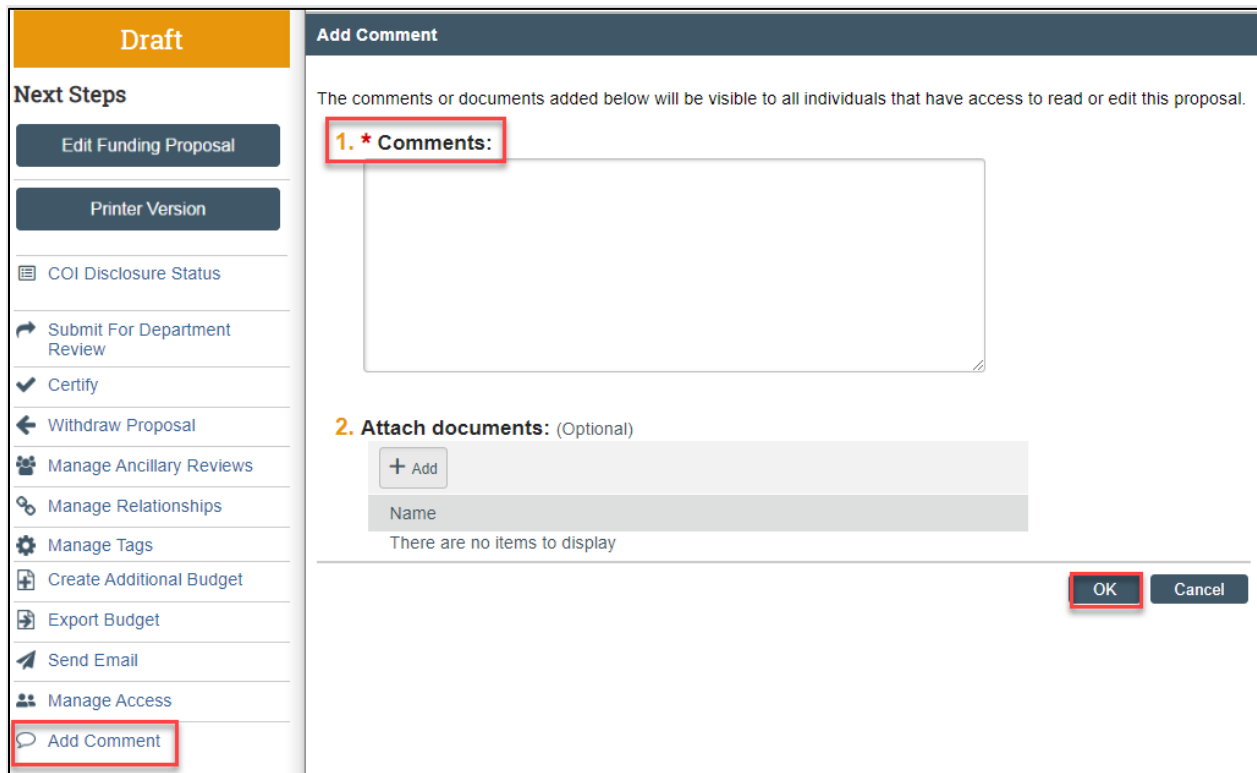
 **Note:** Copied records are not linked as a Related Project. You do not need to use the Copy feature to complete a resubmission. Proposals marked as Not Funded will allow you to create a Resubmission.

7.6 How to Add a Comment

Comments can be added to a proposal and are visible to all individuals that have access to read or edit the proposal.

Follow the steps below to add a comment to the Proposal:

1. On the Proposal Workspace, select the **Add Comment** activity.



Draft

Add Comment

The comments or documents added below will be visible to all individuals that have access to read or edit this proposal.

1. * Comments:

2. Attach documents: (Optional)

+ Add

Name

There are no items to display

OK Cancel

Next Steps

Edit Funding Proposal

Printer Version

COI Disclosure Status

Submit For Department Review

Certify

Withdraw Proposal

Manage Ancillary Reviews

Manage Relationships

Manage Tags

Create Additional Budget

Export Budget

Send Email


Manage Access

Add Comment

2. In the Add Comment window, enter your comments and any attachments. When complete, select **OK** to return to the Workspace.

3. Navigate to the **History** tab to review the comments.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log	...
Activity			Author			Activity Date			
Comments Added			PI (1), Test			1/30/2023 3:24 PM			
Adding a comment to a funding proposal.									

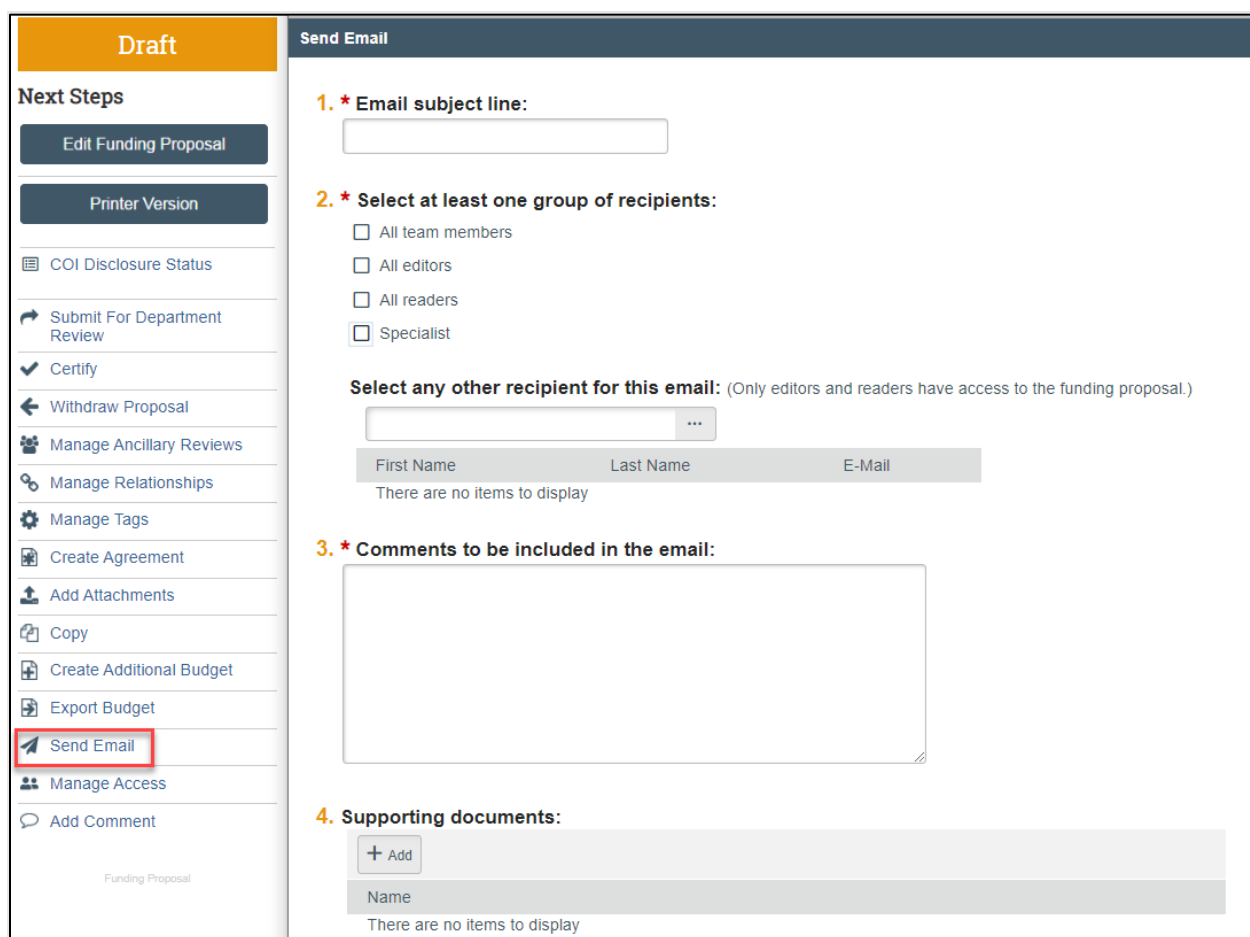
 **Note:** Adding a comment to a record does not send a notification that a comment has been added. Use the [Send Email](#) function if you would like to send a notification.

7.7 How to Send an Email

Emails can be sent (using RAMP) from the proposal to other users at UW-Madison. All emails are tracked within the History tab of the proposal and are available to anyone with access to the record. If you use the Send Email feature within RAMP, note that it will be specific to the record. Do not include information about other

proposals, awards, or agreements in the email if they are unrelated. Follow the steps below to send an email from the Proposal:

1. On the Proposal Workspace, select the **Send Email** activity.
2. In the Send Email window, complete the required fields and add documents if needed. If you would like to send the email to a recipient that is not included in one of the groups selected in required Question 2, type the additional recipient's name(s) in the person selector in Question 2.



Draft

Send Email

Next Steps

Edit Funding Proposal

Printer Version

COI Disclosure Status

Submit For Department Review

Certify

Withdraw Proposal

Manage Ancillary Reviews

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

Create Additional Budget

Export Budget

Send Email

Manage Access

Add Comment

Funding Proposal

1. * Email subject line:

2. * Select at least one group of recipients:

All team members

All editors

All readers

Specialist

Select any other recipient for this email: (Only editors and readers have access to the funding proposal.)

First Name	Last Name	E-Mail
There are no items to display		

3. * Comments to be included in the email:

4. Supporting documents:

+ Add

Name
There are no items to display

3. When complete, select **OK** to send the email and return to the Workspace.
4. Navigate to the **History** tab to review the comments entered in the activity.


8 How to Manage Follow-On Proposal Types

RAMP allows a user to create follow-on proposals that originate with another proposal record instead of starting with a new record.

Continuation applications that require institutional signature, such as those used for Research Performance Progress Reports (RPPRs), are created from an active Award record. For this reason, Continuation application directions are included in both the Funding Proposal and Award user guides.

The following types of follow-on proposals can be created:

- **Renewal** – Create a renewal for a proposal in the Awarded state.
- **Revision** – Create a revision (also called a supplement) for a proposal in the Awarded state.
- **Resubmission** – Create a resubmission from a proposal in the Not Funded or Withdrawn states. These states occur only after the proposal has been in the Pending Sponsor Review state.

 **Important:** When editing a follow-on proposal, **verify you are in the follow-on proposal and not the original proposal** before making edits or updates. The sections below provide follow-on proposal numbering conventions that will help you identify the type of proposal.

The subsections below describe how to create each of these follow-on proposal types.

8.1 [How to Create a Renewal Proposal](#)

Follow the steps below to create a renewal proposal:

1. On the Proposal Workspace of a proposal in the Awarded state, select the **Create Renewal** button.
2. The Proposal SmartForm displays. Notice Question 1 “Type of application” indicates a type of Renewal.
3. Update the questions as necessary and use the **Continue** button to navigate through the SmartForm. On the last page, select the **Finish** button.

4. When returned to the Proposal Workspace, note the state is Draft and the proposal type is indicated as Renewal.

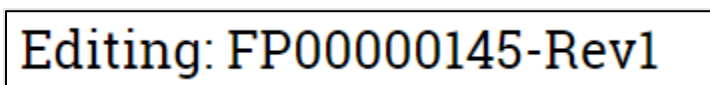


5. Complete the Budget, the SF424 if applicable, and any other necessary activities and/or tasks.
6. When the submission is complete, select the **Submit for Department Review** activity.
7. The renewal proposal follows the same workflow as the primary proposal.
8. If resubmitting a renewal proposal that was not funded, create the resubmission from the Not Funded or Withdrawn renewal proposal.

8.2 How to Create a Revision to a Proposal

Follow the steps below to create a revision to a proposal:

1. On the Proposal Workspace of a proposal in the Awarded state, select the **Create Revision** activity.
2. In the Create Revision window, enter the **Revision name** (this name becomes the proposal short title) and select **OK**.
3. The Proposal SmartForm displays. Notice the **ID** has been amended with "Rev" and the number of the revision.



4. Update the questions as necessary and use the **Continue** button to navigate through the SmartForm. On the last page select the **Finish** button.
5. When returned to the Proposal Workspace, note the state is Draft and the proposal type is indicated as "Revision."



6. Complete the Budget, the SF424 if applicable, and any other necessary activities and/or tasks.
7. When the submission is complete, select the **Submit for Department Review** activity.
8. The revision proposal follows the same workflow as the primary proposal.
9. If creating a subsequent revision, create all other proposals from the main awarded funding proposal.

8.3 How to Create a Resubmission Proposal

Follow the steps below to create a resubmission from a proposal in the Not Funded or Withdrawn states. Note that these states occur only after the proposal has been in the Pending Sponsor Review state.

1. On the Proposal Workspace of a proposal in the Not Funded or Withdrawn state, select the **Create Resubmission** activity.
2. In the Create Resubmission window, enter the **Resubmission name** (this name becomes the proposal short title) and select **OK**.
3. The Proposal SmartForm displays. Notice Question 1 “Type of application” indicates a type of “Resubmission.”
4. Update the questions as necessary and use the **Continue** button to navigate through the SmartForm. On the last page select the **Finish** button.
5. When returned to the Proposal Workspace, note the state is Draft and the proposal type is indicated as “Resubmission.”



6. Complete the Budget, the SF424 if applicable, and any other necessary activities and/or tasks.
7. When the submission is complete, select the **Submit for Department Review** activity.

8. The resubmission proposal follows the same workflow as the primary proposal.
9. If creating a subsequent resubmission, create all other resubmission proposals from the main Not Funded or Withdrawn funding proposal.

8.4 How to create a Continuation Proposal

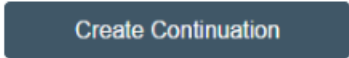
Continuation Funding Proposals are created from active award records. Continuations should be used for progress reports requiring authorized official or RSP involvement that are not for new time periods or funds outside of the original proposal. Examples on when to use and not use a continuation proposal:


- Use continuation for NIH RPPRs and other federal or non-federal sponsor progress reports needing authorized official signoff.
- Do not use for non-institutionally endorsed technical reporting (this can be submitted directly by the PI).
- Do not use for competing continuations or requests for new project periods (use renewal instead).

Follow the steps below to create a continuation Proposal.

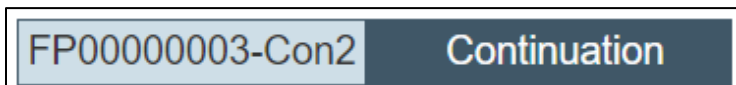
1. Navigate to Award Workspace for an award in the Active state and select the

Creation Continuation button.



2. The Continuation Funding Proposal SmartForm displays. Notice that this is a short form and is different from the Funding Proposal SmartForm used for New, Resubmission, Renewal, and Revision applications. The top portion of the form provides reminders about when to use and not use the form.
3. Complete the form as necessary, attaching a copy of the supporting documentation (e.g., a copy of the progress report and sponsor directions) and adding submission information (select the **help text icon**  for more information about what to include in this field).
4. Use the **Continue** button to navigate to the Completion Instructions page. Select the **Finish** button on this page to return to the Award Workspace.

5. When returned to the Award Workspace, note the state is Draft and the proposal type is indicated as Continuation.



6. When the submission is complete, select the **Submit for Department Review** activity.
7. The continuation proposal follows the same workflow as a new funding proposal record.

9 RAMP Glossary

The RAMP glossary is available on the RED website and can be accessed here: <https://rsp.wisc.edu/training/atp-ramp-resources.cfm>.

10 Appendix

10.1 Other Funding Proposal Uses

In addition to funding proposals for external sponsors, RAMP will also be used for limited submission competitions and certain pre-proposals that require RSP review and signature. Follow the directions below to initiate, complete, and submit these types of funding proposal records.

10.1.1 [Internal Competitions for Limited Opportunities](#)

Submissions for Office of the Vice Chancellor for Research and Graduation Education (VCRGE) limited opportunities will be entered in RAMP.

Follow the steps below to create a proposal for a limited opportunity:

1. On the Dashboard or Grants Module page, select the **Create Funding Proposal** button.
2. Complete the mandatory questions on the [Funding Proposal SmartForm pages](#) and complete the [Budget SmartForm](#) using the directions in this guide except for these alternate directions:

- a. General Proposal Information
 - i. **5. Select the direct sponsor** – use “**ADMINISTRATION*RSRCH SERV**” (org ID A340256). Do not use the external sponsor for the limited opportunity.
 - ii. **10. Is this a limited submission?** – select Yes.
 - iii. **11. Select the opportunity** – select the appropriate opportunity for the limited opportunity. VCRGE maintains and updates this list.
 - b. Submission Information
 - i. **4. Add any general submission documents** – select **+Add** and attach your limited opportunity proposal here.
 - c. Budget Periods and Key Dates
 - i. **1. Application submission deadline** – enter the limited opportunity due date (do not enter the sponsor due date).
3. **Do not** create a SF424 record for limited opportunities that will ultimately be submitted to Grants.gov as a system-to-system submission. The SF424 will be created as part of a separate proposal record if selected for a full proposal.
 4. Certify the proposal using the directions in this guide and then select the Submit for Department Review activity to submit the proposal for the limited submission review process. Submitters will be notified if they are selected to submit a full proposal.
 5. Principal Investigators (PIs) selected by VCRGE to submit a full proposal to the sponsor should [copy](#) the limited opportunity proposal and update the copied proposal as appropriate to reflect the correct answers for an extramural submission.

10.1.2 [Pre-Proposals](#)

Pre-Proposals (also known as a preliminary proposal, white paper, letter of intent, or concept paper) must be entered into RAMP ***if the pre-proposal requires institutional approval/endorsement, includes a detailed budget, or commits University resources***. Do not submit the pre-application to the sponsor until it has been reviewed and approved using the process below:

1. On the Dashboard or Grants Module page, select the **Create Funding Proposal** button.
2. Complete the mandatory questions on the Proposal SmartForm pages as [outlined in this guide](#).
3. Complete the mandatory questions on the [Funding Proposal SmartForm pages](#) using the directions in this guide except for these alternate directions:
 - a. General Proposal Information
 - i. **11. Is this a pre-proposal, white paper, or letter of intent to submit?** – select Yes.
 - b. Submission Information
 - i. **3. Will this submission be submitted system-to-system** – select **No** for all pre-proposals.
 - ii. **4 or 6** (numbering varies depending on sponsor selected). **Add any general submission documents** – select **+Add** and attach your pre-proposal documents, the Funding Opportunity Announcement (FOA), and any specific instructions regarding the pre-proposal.
 - c. Budget Periods and Key Dates
 - i. **1. Application submission deadline** – enter the pre-proposal due date (do not enter the full proposal due date).

4. Do not complete a budget if not required for the pre-proposal. If the sponsor requires a detailed budget, complete the [Budget SmartForm](#) using the directions in this guide.
5. **Do not** create a SF424 record for a pre-proposal that will ultimately be submitted to Grants.gov as a system-to-system submission. The SF424 will be created as part of a separate proposal record if selected for a full proposal.
6. Route the proposal record through the [review and approval process](#) as outlined in this guide.
7. After RSP has endorsed the pre-proposal, submit the pre-proposal according to the sponsor instructions.
8. Use the **Add Attachments** activity on the Funding Proposal Workspace to add the final pre-application, submission email or confirmation, or other relevant documents.
9. If selected for a full proposal, you will make a new funding proposal record for the external submission to the sponsor. To ease data entry on the full proposal record, considering using the [copy](#) feature.

10.2 Other Budget Uses

The [budget section](#) of this guide covers the typical sponsor budget scenarios; however, RAMP includes other less frequently used budget functions that are outlined in this appendix section.

10.2.1 Detailed Travel Costs Budget

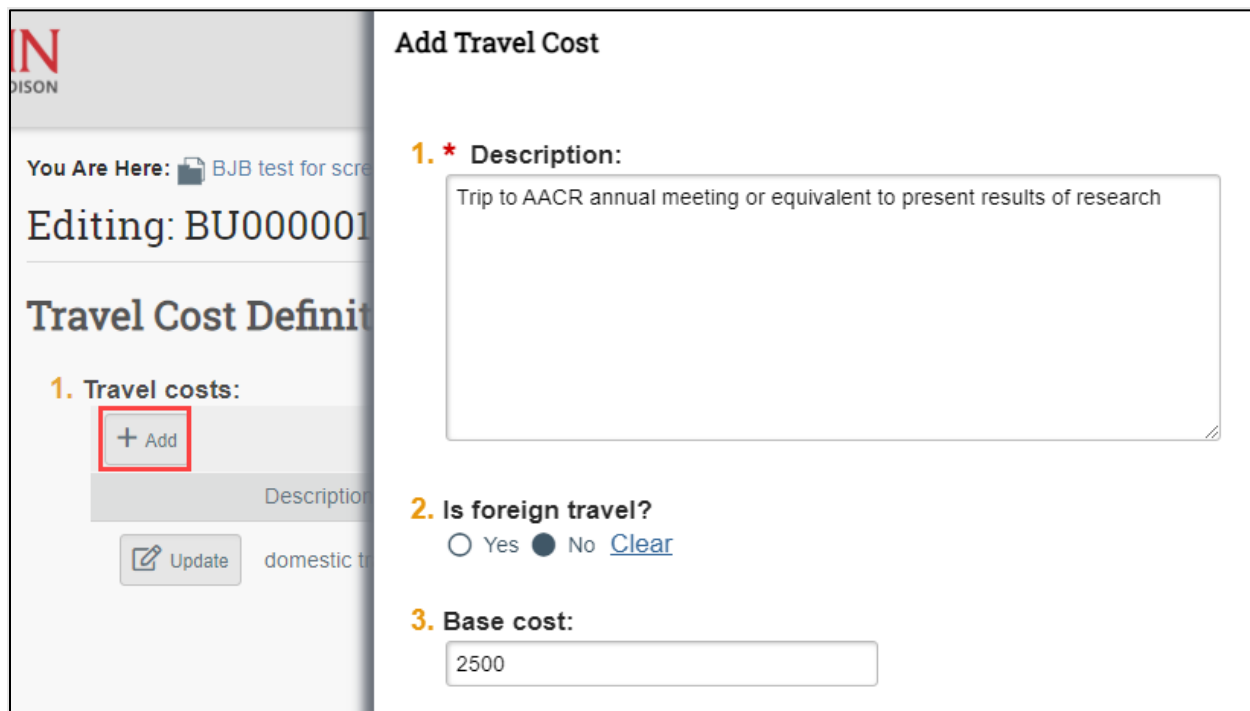
10.2.1.1 Travel Cost Definition Page

This page appears if you entered Yes to travel costs on Question 4 (Will you require detailed budget tables for this budget submission?) on the General Budget Information page.

Like the Personnel Costs pages, the General Cost tables consist of two pages. The first page, Travel Cost Definition, is for entering cost line items.

The second page, Travel Costs, is for entering the quantity per line item to calculate the total travel costs.

1. Travel Costs – Select **the Add** button to add new travel costs and repeat as necessary.



Add Travel Cost

1. * **Description:**

Trip to AACR annual meeting or equivalent to present results of research

2. **Is foreign travel?**

Yes No [Clear](#)

3. **Base cost:**

2500





In the Add Travel Cost window, answer the following questions:

1. **Description** – Description of travel event.
2. **Is foreign travel?** – Answer Yes or No.
3. **Base cost** – Enter the travel cost.

When complete, select **OK** or **OK and Add Another**.

Travel Cost Definition

1. Travel costs:

+ Add		Description of Travel	Is Foreign Travel	Base Cost
	Update	Travel to meet with collaborators at subaward performance site	no	\$1,000.00 
	Update	Trip to AACR annual meeting or equivalent to present results of research	no	\$2,500.00 

10.2.1.2 Travel Costs Page

This page consists of a Budget Summary table and a Travel Costs table that contains a row for each travel line item listed on the prior page.

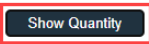
- i. Select the **Show Quantity** button to display data entry fields used to indicate the number of trips and number of people per trip. Select the **Show Totals** button to display the total travel costs (save the page to update budget calculations).

Travel Costs

Budget Summary

	Period 1 7/1/2024 6/30/2025	Period 2 7/1/2025 6/30/2026	Period 3 7/1/2026 6/30/2027	Period 4 7/1/2027 6/30/2028	Period 5 7/1/2028 6/30/2029	Budget Totals
Travel Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Travel Costs

		Period 1 7/1/2024 6/30/2025	Period 2 7/1/2025 6/30/2026	Period 3 7/1/2026 6/30/2027	Period 4 7/1/2027 6/30/2028	Period 5 7/1/2028 6/30/2029
Description: Travel to meet with collaborat...	Total Units: Unit Cost w/Inf: Total:	0 \$1,000.00 \$0.00	0 \$1,000.00 \$0.00	0 \$1,000.00 \$0.00	0 \$1,000.00 \$0.00	0 \$1,000.00 \$0.00
Description: Trip to AACR annual meeting or...	Total Units: Unit Cost w/Inf: Total:	0 \$2,500.00 \$0.00	0 \$2,500.00 \$0.00	0 \$2,500.00 \$0.00	0 \$2,500.00 \$0.00	0 \$2,500.00 \$0.00
Domestic Travel Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Foreign Travel Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Cost Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- ii. Enter the applicable **# Trips** and **# People per Trip** for each line item. If you expect these values to remain consistent across all periods, select the **small arrows** to copy the values to the later periods.

Travel Costs						
Show Totals	Period 1 7/1/2024 6/30/2025	Period 2 7/1/2025 6/30/2026	Period 3 7/1/2026 6/30/2027	Period 4 7/1/2027 6/30/2028	Period 5 7/1/2028 6/30/2029	
Description: Travel to meet with collaborat...	# Trips: <input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	# People per Trip: <input type="text" value="4"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Description: Trip to AACR annual meeting or...	# Trips: <input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	# People per Trip: <input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Domestic Travel Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Foreign Travel Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Cost Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- iii. Repeat this process for all travel costs. When complete, select the **Save** to update the totals fields in both the Budget Summary and Travel Costs tables.
- iv. Enter travel costs notes on the page if necessary.

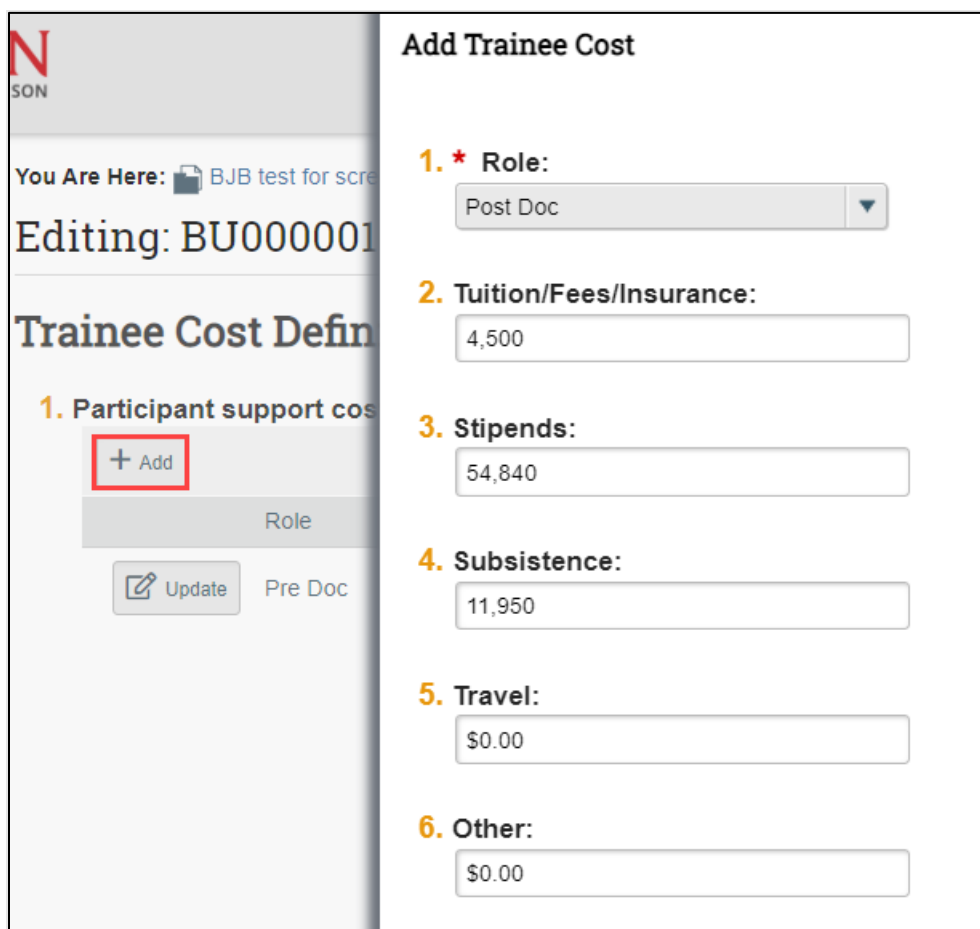
10.2.2 Detailed Participant Support Costs Budget

10.2.2.1 Trainee Cost Definition Page

This page appears if you entered Yes to participant support costs on Question 4 (Will you require detailed budget tables for this budget submission?) on the General Budget Information page. The terms participant support costs and trainee costs are interchangeable in RAMP and in this guide.

Like the Personnel Costs pages, the Trainee Cost tables consist of two pages. The first page, Trainee Cost Definition, is for entering trainee line items by trainee role. The second page, Trainee Costs, is for entering the number of trainees by role/level to calculate the total trainee costs.

Trainee Costs – Select the **Add** button to add new trainee costs for each trainee role/level and repeat as necessary.



Add Trainee Cost

- * Role:**
Post Doc
- Tuition/Fees/Insurance:**
4,500
- Stipends:**
54,840
- Subsistence:**
11,950
- Travel:**
\$0.00
- Other:**
\$0.00

In the Add Trainee Cost window, answer the following questions, using your funding opportunity announcement and sponsor guidelines:

1. **Role** – Enter the role using the drop-down
2. **Tuition/Fees/Insurance**
3. **Stipends**
4. **Subsistence**
5. **Travel**
6. **Other**

When complete, select **OK** or **OK and Add Another**.

Trainee Cost Definition

1. Participant support costs:

+ Add

Role	Per Person Cost Total
Pre Doc	\$46,752.00
Post Doc	\$71,290.00

10.2.2.2 Trainee Cost Page

This page consists of a Budget Summary table and a Trainee Costs table that contains a row for each trainee role/level listed on the prior page.

- i. Select the **Show Quantity** button to display data entry fields used to indicate the number of trainees for each trainee role/level. Select the **Show Totals** button to display the total trainee costs (save the page to update budget calculations).

Trainee Costs

Budget Summary

Period:	Period 1	Period 2	Period 3	Period 4	Period 5	Budget Totals
Start:	1/1/2024	1/1/2025	1/1/2026	1/1/2027	1/1/2028	
End:	12/31/2024	12/31/2025	12/31/2026	12/31/2027	12/31/2028	
Duration:	12.00	12.00	12.00	12.00	12.00	
Trainee Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Total:	\$16,500.00	\$16,500.00	\$16,500.00	\$16,500.00	\$16,500.00	\$82,500.00
Indirect Total:	\$9,158.00	\$4,718.00	\$0.00	\$0.00	\$0.00	\$13,876.00
Grand Total:	\$25,658.00	\$21,218.00	\$16,500.00	\$16,500.00	\$16,500.00	\$96,376.00

Trainee Costs

Period:	Period 1	Period 2	Period 3	Period 4	Period 5
Start:	1/1/2024	1/1/2025	1/1/2026	1/1/2027	1/1/2028
End:	12/31/2024	12/31/2025	12/31/2026	12/31/2027	12/31/2028
Duration:	12.00	12.00	12.00	12.00	12.00
Tuition/Fees:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Stipends:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subsistence:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Trainee Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- ii. Enter the applicable **# Trainees** as necessary. If you expect these values to remain consistent across all periods, select the small arrows to copy the values to the later periods.

Trainee Costs						
Show Totals	Period:	Period 1	Period 2	Period 3	Period 4	Period 5
	Start:	1/1/2024	1/1/2025	1/1/2026	1/1/2027	1/1/2028
	End:	12/31/2024	12/31/2025	12/31/2026	12/31/2027	12/31/2028
	Duration:	12.00	12.00	12.00	12.00	12.00
Role: Post Doc 1 Year	# Trainees:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Trainee Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- iii. Repeat this process for all trainee costs. When complete, select the **Save** to update the totals fields in both the Budget Summary and Trainee Costs tables.
- iv. Enter participant support costs notes on the page if necessary.

10.2.3 [Cost Share Budgeting](#)

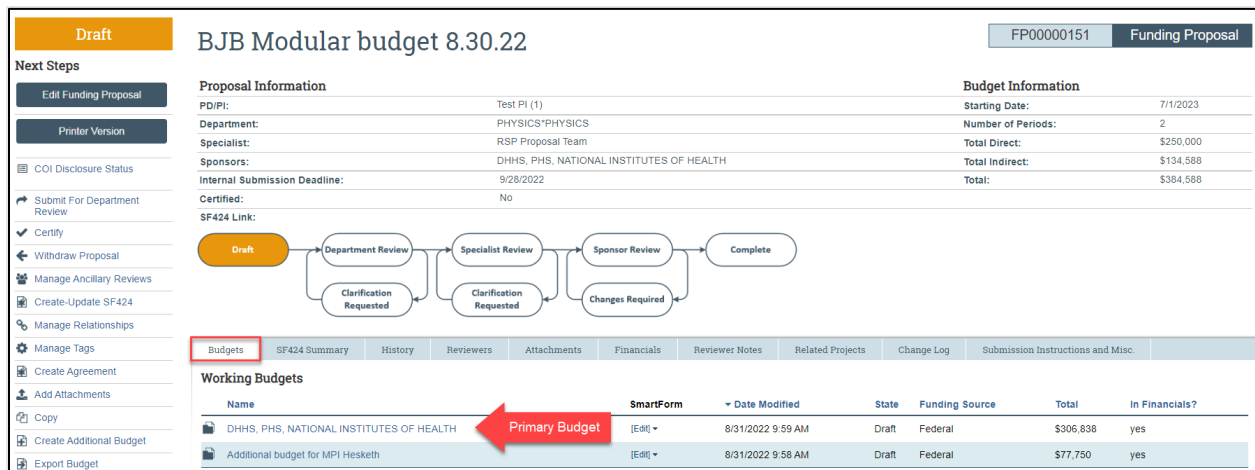
10.2.3.1 How to Create a Cost Share Budget

If applicable, create a cost share budget to reflect mandatory or voluntary committed cost sharing. Cost share budgets must be created after the primary budget associated with the proposal has been created.

Do NOT create a cost share budget for voluntary uncommitted cost sharing or for salary above a sponsor-imposed salary cap. The [next section](#) provides additional directions for how to manage cost share budgets for proposals with salaries over-the-cap and additional cost share.

Follow the steps below to create a cost share budget:

1. Navigate to the Proposal Workspace.
2. On the Proposal Workspace, under the Budgets tab, select the **primary budget name** to display the Budget Workspace.



Proposal Information		Budget Information	
PD/PI:	Test PI (1)	Starting Date:	7/1/2023
Department:	PHYSICS*PHYSICS	Number of Periods:	2
Specialist:	RSP Proposal Team	Total Direct:	\$250,000
Sponsors:	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	Total Indirect:	\$134,588
Internal Submission Deadline:	9/28/2022	Total:	\$384,588
Certified:	No		
SF424 Link:			

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	[Edit]	8/31/2022 9:59 AM	Draft	Federal	\$306,838	yes
Additional budget for MPI Hesketh	[Edit]	8/31/2022 9:58 AM	Draft	Federal	\$77,750	yes

3. On the Budget Workspace, select the Create Cost Share button.



Sponsor Information		Grand Total	
Sponsor:	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	Grand Total:	\$306,838
PI:	Test PI (1)	Budget Type:	Federal
Funding Proposal:	BJB Modular budget 8.30.22	Subaward Count:	0

4. Complete the Cost Share SmartForm pages. The Cost Share Information page is unique to the Cost Share SmartForm and the remaining pages are similar to primary Budget SmartForm.

a. Cost Share Information Page:

i. 1. **Cost share entities** – this question allows you to allocate your cost share budget among responsible entities. Select **Add** to open the Add UW Cost Share Entity window and complete the following questions for all entities:

a. **1. Is this cost share funded by University of Wisconsin or a third party** – select the appropriate answer.

b. **2. Who will provide funding** – search for the responsible department or division (for UW-Madison) or external party (for third party). Use

the text box to enter the entity name if it is not in the search list.

- c. **3. Cost share type** – select the appropriate type.
 - d. **4. Amount** – enter the amount of the cost share commitment.
 - e. **5. Description** – enter a description of the cost sharing provided by the entity if needed.
- b. General Budget Information page – enter No for Question 5
“Include in consolidated budgets.”
5. Complete the remaining Budget SmartForm questions/pages using the [How to Complete a Budget](#) section above.



Notes:

- Cost share is reviewed and approved by Deans and divisions at the time of workflow approval. Additional documentation is required for institution-level cost share or cost share from a department other than the owning level department, and must be uploaded to the funding proposal.
- Cost share budgets are reviewed along with project budgets by division and department reviewers during the funding proposal review and approval workflow. Division and department approval of a funding proposal containing cost share constitutes approval of the cost share attributed to the approving unit. Division approval is provided via the Approve activity for a funding approval in the Department Review state. Department approval is provided either via the Chair Approval ancillary review or via the Approve activity for those units that are using a two-step approval process.
- Approval for cost share provided by a third party, the institution, or a division/department other than the responsible department/division is typically requested in advance and


documentation of the approval should be attached to the funding proposal record.

- To add unrecovered F&A or subaward cost share, add them under General Costs as direct costs.
- For future reference, cost share budgets are displayed under the Budgets tab of the Proposal Workspace.

Budgets	Budget Summary	SF424
Working Budgets		
Name		
	Cost Sharing for National Institutes of Health	
	National Institutes of Health	

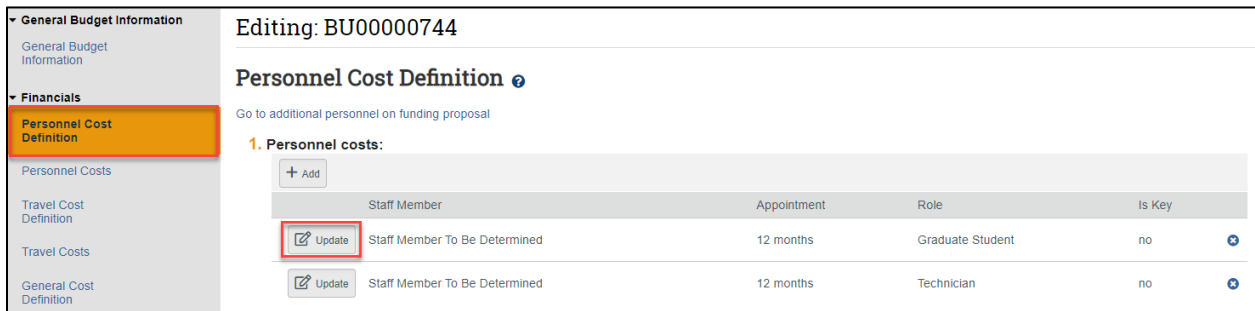
10.2.3.2 Over-the-Cap and Additional Cost Share

UW-Madison is not using a cost share budget to account for over-the-cap salary. If your primary proposal contains salaries over the cap and you create a cost share budget, the salary over the cap will display on the Personnel Costs – Cost Share page (it is automatically calculated). UW-Madison will update the base salary of individuals over-the-cap to equal the salary cap and not applying inflation to prevent over-the-cap salary from being reflected on a cost share budget.

 **Important:** This process should only be used for proposal records that include cost share budgets. **Do not update the base salary on budgets that do not involve cost sharing.** The goal of separating the costs is to account for the additional cost share only and exclude the over-the-cap amount.

Follow the steps below to update base salaries in RAMP:

1. Navigate to the sponsor budget record and select the **Edit Budget** button to open the budget SmartForm.
2. Use the left navigator to move to the Personnel Cost Definition page.
3. Select the **Update** button to the left of the staff member(s) with salary over-the-cap.







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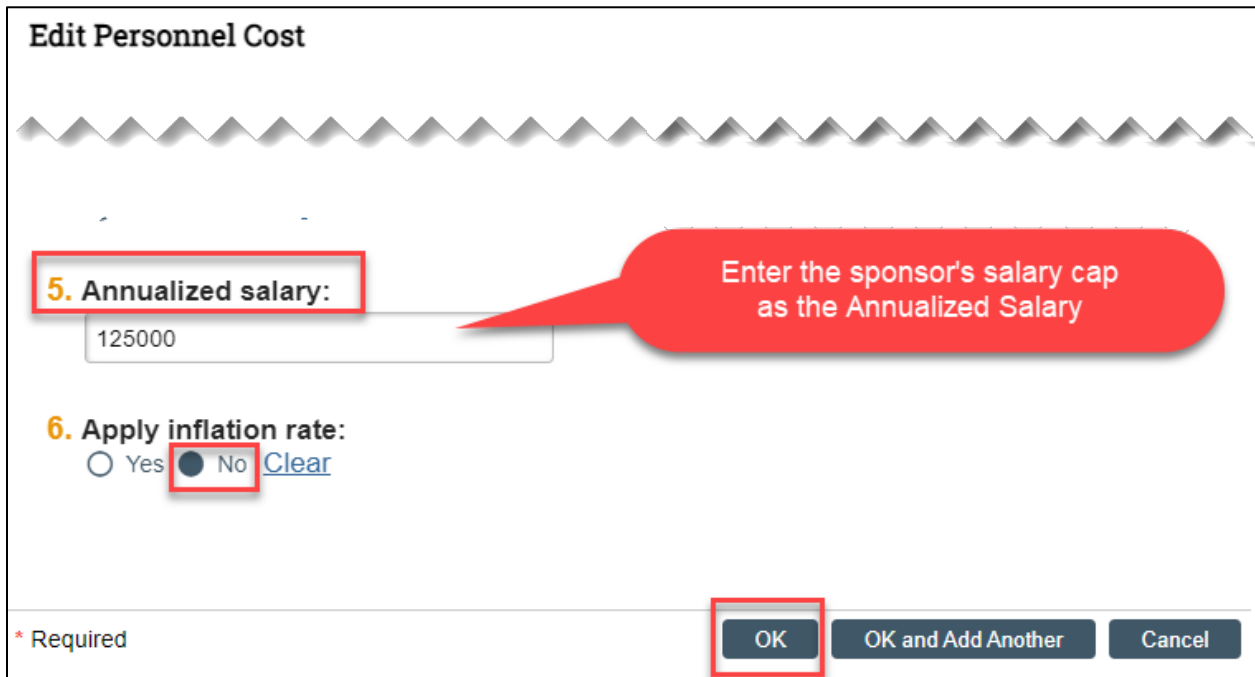
Personnel Cost Definition

Go to additional personnel on funding proposal

1. Personnel costs:

Staff Member	Appointment	Role	Is Key
 Staff Member To Be Determined	12 months	Graduate Student	no 
 Staff Member To Be Determined	12 months	Technician	no 

4. In the Edit Personnel Cost window, make the following changes:
 - a. Question 5: Annualized salary – enter the **sponsor’s salary cap**.
 - b. Question 6: Apply inflation rate – select **No**.
 - c. Select **OK** to close the window.



Edit Personnel Cost

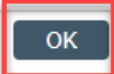
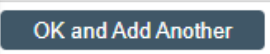
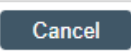
5. Annualized salary:

125000

Enter the sponsor's salary cap as the Annualized Salary

6. Apply inflation rate:

Yes No [Clear](#)

* Required   

5. Repeat as necessary for additional team members.