Quick Reference

PROCESSING A LETTER OF INTENT, PRE-APPLICATION, PRE-PROPOSAL, OR WHITE PAPER........................2-3
Processing a Letter of Intent, Pre-Application, Pre-Proposal, or White Paper

Where to start?

1. Click Create Funding Proposal. Complete the Funding Proposal SmartForms noting the information below.

How do I process my submission?

2. On the Proposal Description & Contacts SmartForm select New in question 4.

3. In General Proposal Information choose how the pre-proposal information will be submitted.

4. Select Other as the Instrument Type. In the text box specify Letter of Intent or Pre-Application.

5. On the Budget Periods SmartForm, if a budget is required by the sponsor, indicate the number of periods in the budget. If a budget is not required, remove all budget periods except one (the solution requires at least 1 budget period in every funding proposal).

6. Finish the Funding Proposal and enter the Budget Workspace.

7. Click Edit Budget.

8. If the Sponsor requires a budget complete the SmartForms as required for School and Department review.
9. If the Pre-Application does not require a budget, click “Edit Budget”, and select the following options in the Budget smart form:
   a. Select “Yes” to include a detailed budget
   b. Select “Yes” to include the budget in the funding proposal (the system requires at least one budget to be included) This budget however will be all zeros.
   c. The budget grids (Personnel and General Costs) can be left with zeros, and the budget smart forms should then be saved.

10. The remainder of the funding proposal and routing should follow the standard submission process.