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| **ORIS TipSheet**  **Copying Cautions** |

2017

Copying proposals can be a useful convenience, although problems arise at an increasing rate as proposals are copied, recopied and even “passed” from one user to another within departments over time. The degree of difficulty in diagnosing and solving those problems increases with the number of times the proposal has been copied.

In an effort to clarify best practices in copying proposals to reduce potential system errors, ORIS offers these guidelines.

# ****copy functionality is designed for two types of submission events****

Copying in the following circumstances rarely causes system problems:

* Grants.gov change/corrected submissions, and
* Submitting the identical proposal to multiple sponsors.

# When copying for other purposes, avoid problems by:

Immediately Removing the Grants.gov Link.

Ensure that your opportunity is current and has not been re-issued by the sponsor under a different opportunity number. Go to the Grants.gov window (Action>Grants.gov) and use the “Delete Opportunity” button.

If you simply delete the funding opportunity number on the Proposal Details window, the active link with Grants.gov is NOT removed.

#### Choosing Not to Copy:

* **Budget**, especially if the Project Dates have changed. This sometimes causes calculation errors, especially if the budget has been copied multiple times from proposal to proposal. This is not the same as versioning a budget within the same proposal.
* **Attachments**, especially if the science will change. If the original proposal is older, there also is a good chance that departmental roles will have changed, causing Narrative editing rights to become confused.
* **Questionnaires**, especially if the original proposal is older. Questions may have been changed or added and the system can get “stuck” on the old answers.

#### If you must copy the Budget:

* Consider creating a new Budget Version, rather than editing a copied version.
* For a copied budget,
  + **Sync the Budget Periods** if the proposal project dates have altered, then save.
  + **Sync the Budget Rates** to bring in the most recent applicable rates, then save.
  + **Maintain Budget Persons**: delete those who are not applicable to the budget any longer. Make sure they also have been removed from the Investigator and/or Key Persons tab, then save.

#### If you must copy the Questionnaires:

* Review and/or edit every question to conform to new project requirements.
* Make sure all questionnaires are answered: there may be a new question-set or questionnaires now applicable that were not for the original proposal.