

Creating a New Proposal by Copying

Can I create a new record from a proposal I already submitted so that I don't have to enter all the information from scratch?



NOTE: ORIS strongly recommends NOT copying attachments and/or budget information, as these usually change. An exception to this rule would be if you are copying a PD for submission around the same time to an additional sponsor.

When copying a proposal, it is important to note that some data maintenance will need to be done, for example:

Certain items are not copied:

- Investigator Certifications: Go to the Investigator Tab, highlight name and click "Certify" button.
- Proposal access roles granted for the original proposal.

Also, certain changes will need to be made:

- Original proposal number, if applicable. Be sure this number is accurate.

TO COPY THE PROPOSAL

1. Click on <Copy Proposal> in the menu on the left side of the screen.
2. Make your selections for Budget, Narrative and Questionnaire. See information below about choices:

A screenshot of the ORIS system interface. The top navigation bar includes 'All Proposals', 'Proposals In Progress', 'Create New Proposal', 'Proposal Search', and 'Grants.gov Opportunity Search'. The main content area is divided into a left sidebar and a right main panel. The sidebar contains a list of menu items with checkmarks: 'Proposal Summary', 'General Info', 'Organization', 'Investigators/Key Persons', 'Special Review', 'Others', 'Proposal Roles', 'Questionnaire' (highlighted), 'CCQ Conditional Compliance Questionnaire', 'MIQ Mandatory International Questionnaire', 'MCQ Mandatory Compliance Questionnaire', 'Budget', 'Upload Attachments', 'Validate', and 'Approval Routing'. The 'Copy Proposal' button is at the bottom of the sidebar. The main panel displays the 'Copy Proposal' options: 'Copy Budget' (checkbox), 'Copy All Budget Versions' (radio), 'Copy Final Version Only' (radio), 'Copy Attachments' (checkbox), and 'Copy Questionnaire' (checkbox). A 'Copy Proposal' button is also visible in the main panel.

If you chose any of these pieces to be copied be sure to verify the following in the new proposal:

Questionnaires: Questionnaires must contain current information and should not be copied.

Budget: Copying the budget often causes errors and it is recommended to input a new budget.

Narrative: Check that all narratives have copied, are relevant and are marked as complete.

3. Click <Copy Proposal>.
4. Select the unit that will process this copied proposal from the dropdown.
5. Make changes in record as needed and verify all components.