Creating a New Proposal by Copying





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:

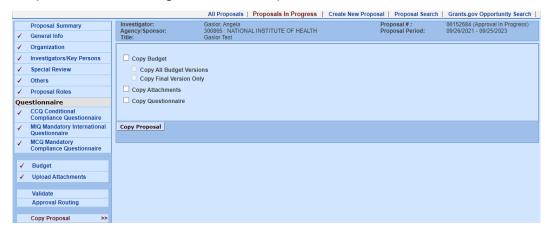
- Investigator Certifications: Go to the Investigator Tab, highlight name and click "Certify" button.
- Proposal access roles granted for the original proposal.

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:



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.