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 the **Maintain Proposal Development** icon .

2. Enter search criteria.

3. Click **Find**.

4. Select the proposal to copy by single-clicking anywhere in its row.

5. Click the **Copy Proposal** icon .

6. Make your selections for Budget, Narrative and Questionnaire.

   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.

7. Click <**OK**>.

8. Select the unit that will process this proposal and click <**OK**>.

9. A line for the copied proposal displays in the **DEVELOPMENT PROPOSAL LIST,** but not necessarily in the top position. To find the new proposal, sort the list in reverse order by clicking in the list header next to "Proposal Number."
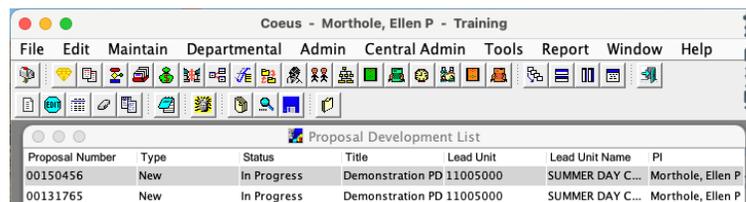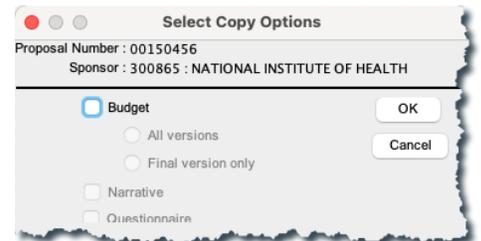
10. Select the line in the Development Proposal List for the new proposal. Click the **Edit** icon .

11. Make changes to the proposal.

12. Click the **Save** icon