



Section 300: Proposal Development and Submission

OSR Policy 300.3 – Pro.1 — Preparing, Submitting, Routing and Certifying an eIPF in Proposal Dashboard

Corresponding with:

[OSR Policy 300.3](#)

[Deadlines for Proposal Submission to University Offices](#)

Procedure Statement

The Research Administration Management System and eSubmission (RAMSeS) is the repository for all sponsored research financial information including both proposal and award data.

The Proposal Dashboard within RAMSeS creates the University's official record for each sponsored research project. The electronic Internal Processing Form (eIPF) is required for each research proposal of a grant, contract or cooperative agreement and it is used to collect financial and compliance information and documentation needed for internal review and approval.

An eIPF is prepared when a PI plans to compete for or receive any funding from an agency. For example, it is necessary to prepare an eIPF for the following:

- A new proposal requesting new dollars not associated with an existing award.
- A proposal supplement requesting additional dollars to an existing award.
- A continuation proposal, both competing and non-competing (e.g., NIH SNAP or eSNAP).
- An incoming subcontract, where funds are directed to the University from the prime recipient of an award.
- The prime contract directly awarded from a Federal, industry, foundation, non-profit or State agency.
- A Master Agreement and initial task order. (Subsequent task orders each have their own unique account numbers that contain the master account number for easy identification.)

Once completed, the eIPF is submitted and electronically routed to the appropriate University officials for review and approval. Lastly, it must be electronically certified by the Principal Investigator (PI), before a proposal is submitted for funding.



Note: Several funding [agencies](#) now require electronic submission of proposals. These types of submissions are agency-specific operations separate from the University's record-keeping systems. Completion of an eIPF through RAMSeS is necessary prior to submitting an electronic application or a paper application.

The following procedures are performed in Proposal Dashboard:

1. Preparing and Submitting an eIPF.
2. Approving and Routing an eIPF.
3. PI Certification of an eIPF.

Instructions for each appear below.

Forms/Instructions

 [Research Administration Glossary at Carolina](#)

I. Preparing and Submitting an eIPF

1. [OSR](#) should be contacted with any questions regarding the preparation of an eIPF.
2. Prior to submitting the eIPF, the individual completing the eIPF should have in hand:
 - a. General proposal information.
 - b. Research team information.
 - c. A completed budget plan and budget justification.
 - d. Regulatory requirements fulfilled.
 - e. Key proposal data and compliance information.
 - f. Subcontractor/s information including a statement of work, budget and budget justification as well as specific sponsor requirements (i.e., [NIH](#)).
 - g. A completed proposal packet, produced using the method and guidelines as required by the sponsoring agency.
3. Login to [RAMSeS](#) using your [ONYEN](#) or SOMID.
4. Select "Start New Proposal" to begin filling in the general proposal information. Once these fields are completed and saved, RAMSeS automatically generates a proposal number and initiates access to an itemized list of additional required information. To assist you in completing the eIPF, a 'HELP' feature is provided within RAMSeS.
5. Once all sections are completed on the eIPF, the preparer submits it for internal approval by selecting the button marked "Submit Proposal." At any time during preparation, an eIPF can be saved for later completion.

II. Approving and Routing an eIPF

1. Upon submission of a proposal, the designated departmental eIPF Approver is responsible for reviewing and approving the eIPF before it is routed for additional approvals, prior to being



sent to the Office of Sponsored Research (OSR), the Sponsored Programs Office (SPO), or the Office of Clinical Trials (OCT) for final approval.

Note: In the event that signature authority has been delegated to another person for purposes of approving the eIPF, a copy of this delegation should be kept on file in the department.

2. The eIPF is first electronically routed to the Administering Award Department for approval by the appropriate dean, director, or chair to confirm the following:
 - a. The PI is appropriately qualified for performance of the project.
 - b. The PI has available time to commit to the project.
 - c. The proposed project is an appropriate activity within the the Department/Center/Institute.
 - d. Determine if additional space or other resources are needed.
 - e. Agree to provide any resources identified in the application (i.e. cost sharing, costs sponsor is unable to pay).
3. The eIPF is then routed to other departments listed in the “Approving Departments” section of the eIPF for approval by the appropriate dean, director, or chair to confirm the following:
 - a. Accurate personnel wages and effort committed.
 - b. Availability and use of space or equipment if requested.
4. Once the eIPF has been approved at all necessary levels, it is electronically routed to OSR, SPO or OCT for final review and institutional signature.

III. PI Certification of an eIPF

Note: Before a proposal can be institutionally signed and submitted to a funding agency, the PI is required to certify the eIPF.

1. When the eIPF is submitted internally, the PI listed on the eIPF receives email notification to certify the eIPF in [RAMSeS](#) by locating the proposal in their PI Certification Inbox. The PI certifies the following:
 - a. The information submitted with the application is true, complete and accurate.
 - b. The PI accepts responsibility for the scientific, fiscal and ethical conduct of the project.
 - c. The PI will comply with all relevant state and federal regulations, University policies and contractual obligations.
 - d. The PI has reviewed all pre-submission compliance requirements.

Revision History

Prior Revisions: The policies in the *Office of Sponsored Research Policies & Procedures Manual* supersede any OSR policies, procedures and appendices previously included in the *University Business Manual*, a publication of UNC Chapel Hill’s [Division of Finance](#).

