Part 1: Creating the Funding Proposal and Budget in RAMS-SPOT

1) First, create a **funding proposal** in RAMS-SPOT

![SF 424 - Test for Mapping](image)

2) On the **Sponsor Information Smart Form**, the PI/Study Staff will want to select a **government sponsor** such as NIH.

![Sponsor Information](image)

3) On the **General Proposal Smart Form**, the PI/Study Staff will answer #4, “**Electronic via grants.gov.**”
4) On the **Federal Grant Information Smart Form**, the PI/Study Staff will 1) enter the **Opportunity ID** and then 2) click on **Find**. 3) This will prompt RAMS-SPOT to bring in the specific **forms set** and **instructions** for that particular Opportunity ID.

![Federal Grant Information Smart Form](image)

5) Next, the PI/Study Staff should enter the **Primary Budget** and any additional budget information in RAMS-SPOT.

![Proposed Budget](image)

**Part 2: Running the Create-Update SF424 Process**

1) After entering the funding proposal and relevant budget information in RAMS-SPOT, the PI/Study Staff should run the **Create-Update SF424** process by clicking on **Create-Update SF424** under **My Current Actions**.

![My Current Actions](image)
2) When initiating the **Create-Update SF424** process, the PI/Study Staff will need to check all **mandatory** and **optional forms**. Note: A **budget** form is not automatically selected. All **budget** forms are listed as optional but, at least one **budget**, must be included in the **SF424** package. At this point, the PI/Study Staff should select a **budget(s)** by entering a checkmark(s) next to the relevant selection(s).

![Image of checklist with boxes checked for forms]

3) The **link** to the **SF424** will now be available in the middle of the main workspace. The PI/Study Staff should click on the **link** to access and complete the **SF424**.

![Image of SF424 workspace with link highlighted]

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4) Next, the PI/Study Staff will click on *Edit Grant Application*.

5) The PI/Study Staff will again select the correct **mandatory** and **optional forms**.
Part 3: Completing the SF424

1) Now that the SF424 has been created. The next step is to go through the SF424 page by page and enter the necessary information. The PI/Study Staff can use the Jump To menu to move throughout the SF424 or click Continue.

2) At times, the PI/Study Staff will need to upload documents by clicking on Add and selecting the correct file.

Part 4: Editing in RAMS-SPOT / SF424

1) When updating the SF424, the PI/Study Staff must carefully consider the source of the information that they would like to edit.

2) If the information that they would like to update was originally entered in the RAMS-SPOT funding proposal or budget, then the PI/Study Staff must update the information on the RAMS-SPOT funding proposal or budget. Next, the PI/Study staff must re-run the Create-Update SF424 process again.

3) If the information that the PI/Study Staff would like to update was entered manually directly on the SF424, then the PI/Study Staff may edit the information directly on the SF424.
Part 5: Validating and Routing for Approval

1) At any time, the PI/Study Staff can click **Hide/Show Errors**.

2) The **errors** will show in **red** and **must** be resolved before the Funding Proposal and **SF424** can be routed for approval.

   ![Error/Warning Messages]

   - This is a required field; therefore, you must provide the required information.

3) The **warnings** will be next to the **yellow caution symbol**. It is recommended for the PI/Study Staff to resolve as many warnings as possible before routing the Funding Proposal and **SF424** for approval.

   ![Error/Warning Messages]

   - The Human Subject Assurance Number may be requested later as part of the eRA Commons Just In Time (JIT) process. (NIH 3.1)
   - In most cases, a Bibliography & References cited attachment should be included. (NIH 3.15.1)
   - Direct cost requests of $250K or less each year on the R&R Budget form must be in modules of $25K, use the PHS 398 Modular may be delayed in the peer review process or rejected. (NIH 7.15.3)

4) Next, the PI/Study Staff will **validate** the **SF424** by clicking on **Validate Submission**.

   ![Activities]

   - Validate Submission
   - Assign Editors and Readers
   - Log Comment
   - Import Subaward
   - Create Pre-submission PDF
At this time, it is recommended that the PI/Study Staff generate a .pdf of the SF424 to review all of the information.

The PI/Study Staff will have the option of whether or not they would like to include attachments when generating the .pdf.

After clicking Generate PDF Version, there will be a link on the screen for the PI/Study Staff to view the .pdf.
6) The next step is to click on **Submission Pre-Check** which checks for missing information that is critical to the SF-424.

![Activities]

7) After the submission pre-check is complete, the next step is to **route** the proposal on to **approval** by clicking **Route for Approval**.

![My Current Actions]