MOREHOUSE SCHOOL OF MEDICINE

Grants Management Office

Research Administrator Engagement Checklist

This checklist is designed to guide Research Administrators in the effective engagement and management of proposals throughout the research proposal application process. It ensures compliance with institutional policies, supports Principal Investigators (PIs), and facilitates proposal tracking.

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e-ITS Date: **Prepared by:**

Proposal ID#: **PI:**

Solicitation Link:

GMO Due Date: **OSP Due Date:** **Sponsor Due Date:**

Proposal Preparation
1. Once the PI has submitted the e-ITS form, the assigned GMO Research Administrator should set up a meeting or communicate via email with the PI to discuss and complete elements of the proposal (listed below):
a. Confirm that the PI is eligible per sponsor guidelines and MSM definitions of eligibility.
b. Check with the PI to see if they have considered having sufficient effort for project.
c. If opportunity is a limited submission, notify PI, GMO will not proceed until ORD issues a notice to proceed for the PI.
e. Review sponsor requirements and take note of any red flags – special conditions.
f. Determine if prior approval is necessary from the sponsor (please note that prior approval is required for some application with large direct costs in any year).
g. Determine if prior approval is necessary from MSM (please note that prior internal approval is required for cost share, other than over- the-salary-cap, and F&A reduction requests).
h. Identify and discuss proposal specific information (i.e., required letter of intent, submission deadlines, key personnel effort percentage, other personnel, F&A allowance, cost share requirements).
i. Identify any subawardees.
j. Define budget elements needed to accomplish research.
k. Determine timeline and assignment of responsibility for completing the necessary proposal components, including uploading to sponsor system within GMO 10-day rule.
2. If a Letter of Intent for proposal is required, the GMO Research Administrator will assist in developing a budget and obtaining institutional signatures, if required by sponsor, from Office of Sponsored Programs (OSP).

	3. Prepare and Compile Proposal Elements
	a. PI or GMO Research Administrator (as applicable) initiates application in sponsor's portal.
	b. GMO Research Administrator completes general administrative information in sponsor's portal using MSM Profile Info Sheet.
	c. GMO Research Administrator works with the PI to ensure that the following required documents, that are relevant to submission and/or required by sponsor, are included:
	i. Budget and Justification, use MSM F&A Rate Agreement and Fringe Benefit for reference. Always complete MSM internal budget and sponsor requested budget template; i.e. R&R Budget Form. – *GMO Research Administrator works with PI to finalize and uploads to sponsor's portal.*
	ii. Statement of work – *PI completes and uploads to sponsor's portal.*
	iii. Research Plan – *PI completes and uploads to sponsor's portal.*
	iv. Resources page – *PI completes and uploads to sponsor's portal.*
	v. Subawardee package: SOW, Budget, Budget Justification, Biosketch, MSM Subrecipient Agreement if institution is not a member of Federal Demonstration Partnership (FDP), Other. – *GMO Research Administrator works with PI and Subawardee to finalize and uploads to sponsor's portal.*
	vi. Proposed Clinical Trial Agreement (CTA), if needed.
	viii. Additional items required by OSP or the sponsor.

Proposal Review and Routing

	1. GMO Research Administrator validates that proposal data has been properly entered into the sponsor's portal with no warnings **(can be routed)** or errors **(can NOT be routed).**
	2. GMO Research Administrator saves and routes the proposal to OSP at least 5-business days before the sponsor's due date. If MSM PI will be a subawardee, route the full subaward package to OSP contact for final review and submission to the lead institution.
	3. Monitor proposal and update Smartsheet Status upon submission to the sponsor. Respond to OSP administrative and budget questions and make adjustments, as necessary.
	4. Contracts are **NOT submitted via e-ITS**. These are uploaded to Agiloft system by Department Finance & Business Official (DFBO). A draft, editable copy of the sponsor-provided contract should be obtained from the sponsor.
	5. Clinical Trial Agreements are **NOT submitted via e-ITS**. If a clinical trial, the sponsor-provided budget, and protocol/informed consent documents, if applicable, need to be included in proposal routing for OSP review and negotiation.

Submission

	1. OSP will review the proposal, contact **GMO Research Administrator** with any **administrative and/or budget questions or concerns** and the **PI** for o**ther proposal component questions or concerns**. When final, OSP will submit to the sponsor.

	2. Proposal submission to sponsor will be occur as follows:
	   a. Electronic Submissions; NIH ASSIST, Research.gov, etc: OSP will submit the final proposal package to the sponsor and send an email confirmation to GMO Research Administrator and PI.
	
	   b. Other Electronic Submissions: Other sponsors require institutional submission through their own electronic system. If PI submission necessary, OSP will notify and provide

| | | required documentation to PI and cc: GMO Research Administrator when the proposal has been approved. |
| | c. | Email: If MSM PI will be a subawardee, OSP will complete final review and submit via email to the lead institution. |

GMO Comments:

OSP Comments: