Major URFO Proposal Creation, Development, and Submission

Creating a New Proposal

Getting to the Create Screen
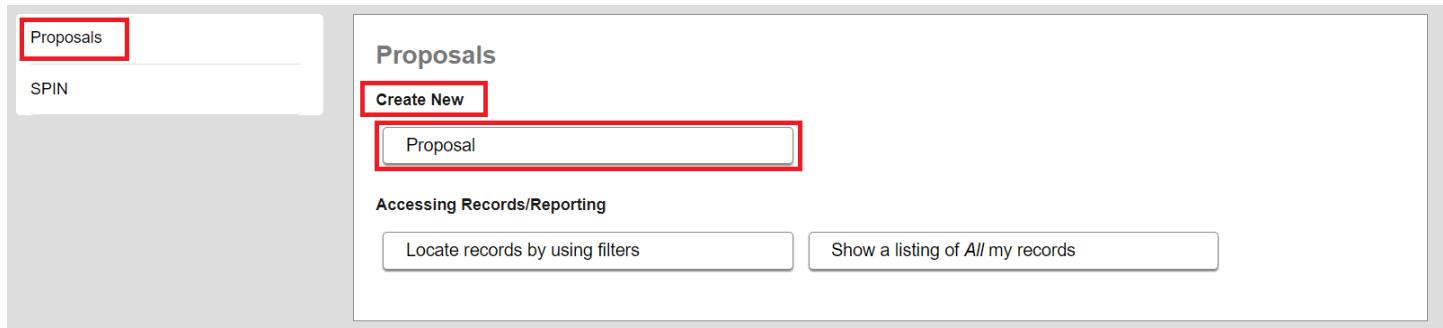
1. From the left navigation menu of the Portal, click "Proposals."
2. Under the Create New section, click the "Proposal" button.

Create New Proposal Screen

The create screen has eight required fields. Once all fields are completed, click "Create Proposal" in the lower right corner to create a proposal record and move on to the Setup Questions screen.
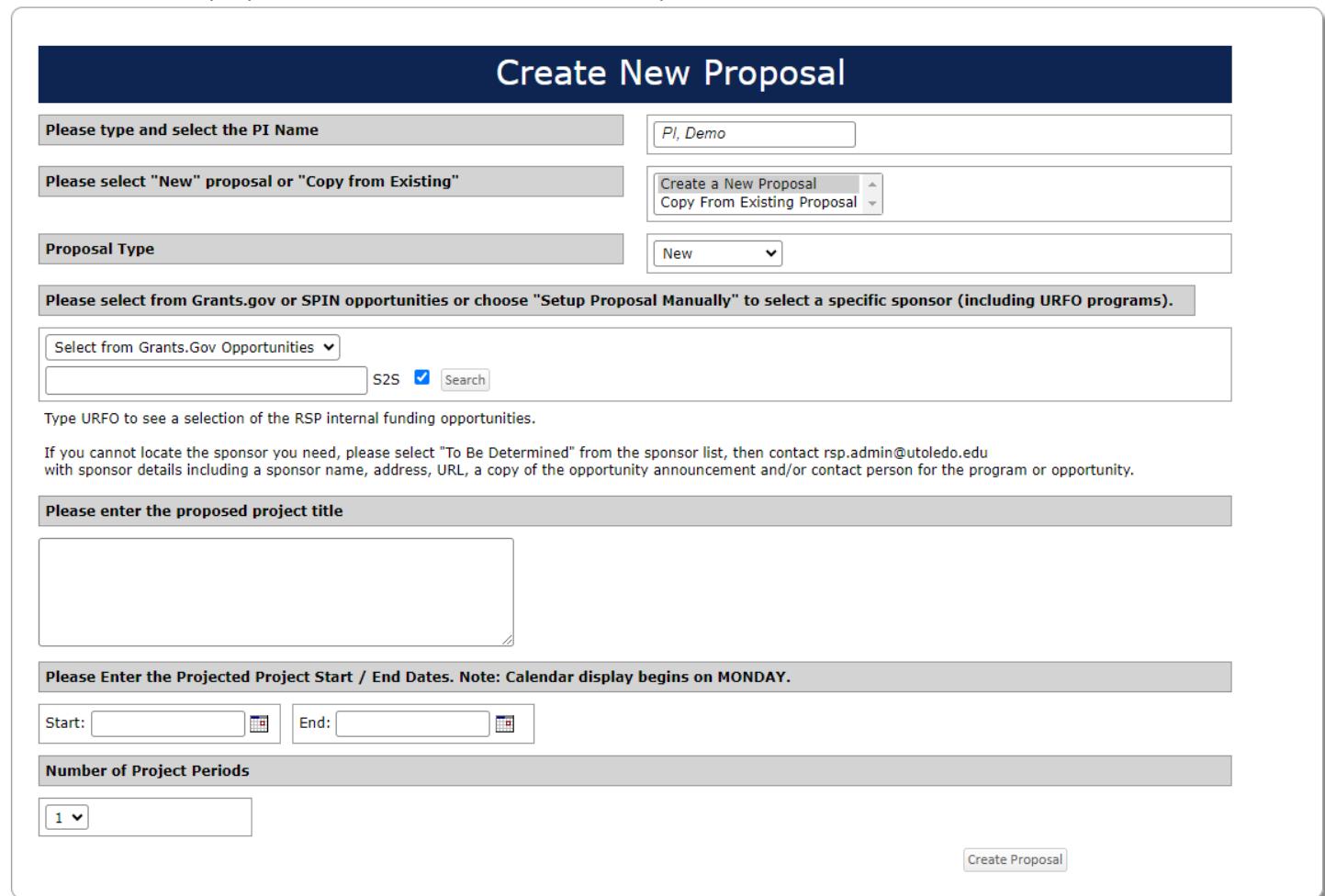
PI Name: This field defaults to the logged in user. If the logged in user is not the PI, begin typing the PI's name in the text box and select the appropriate person from the list.

Create a New Proposal or Copy from Existing: For an URFO proposal, accept the default value **Create a New Proposal**.

Proposal Type: For an URFO proposal, accept the default value of **New**.

Funding Selection: For an URFO proposal, choose the third option in the pulldown menu: **Setup Proposal Manually**.

In the text box below, type "urfo" to then select either **URFO – Major Programs** or **URFO – Minor Programs**. All the programs with January deadlines are Major Programs. The only Minor Programs are Small Grants and Publication Subvention. You will have a chance to select the specific major or minor program on a later screen.

Project Title: Enter at least a working title to start but it should identify your project. Changes to the title can be made if needed.

Project Start/End Dates: Follow the rules below to enter the correct start and end date for your URFO proposal. You may use the calendar or type it in in one of these formats: 03/09/26, 03/09/2026, 030926, 03092026, or 09-Mar-2026.

> **Major Program Start and End Dates**
>
> Research Awards and Fellowships, Archaeological Research Endowment Fund: May 15, 2026, to December 31, 2026 (use calendar or type 05152026 to 12312026)
>
> deArce-Koch: May 15, 2026, to June 30, 2027 (05152026 to 06302027)
>
> Interdisciplinary Research Initiation, Research Innovation Program: May 15, 2026, to December 31, 2027 (05152026 to 12312027).
>
> **Minor Program Start and End Dates**
>
> Small Grants and Publication Subvention Program: estimate the start date (normally at least 30 days from submission) and end date (not to exceed 180 days from start date).

Number of Project Periods: **All URFO programs should use ONE project period!** For project periods over 12 months it will change to 2; you should change to ONE project period before the next step.

Click the Create Proposal button: It will take a moment to complete the steps to create a record.

Setup Questions Screen: URFO – Major Programs

Major Programs Instructions Page

> Complete the questions on this page and then click "Save and Continue" at the bottom.
> Click on the Major Programs tab in the left menu to continue working on your application.
> Click on the Budget tab to add your budget and justification.
> Click on Personnel to add any personnel not included on the Budget.
> Click on Finalize to route the application for administrative review and subsequent chair endorsement.
> You will receive confirmation of your submission via email. Key personnel and chair(s) will receive a request to endorse the application.
> After all chairs have approved, the submission goes to the URFO administrator for final review.
> If you don't receive notification or have system questions, contact InfoEd@utoledo.edu.
> If you have questions about program (e.g. eligible expenses etc.) please contact URFO@utoledo.edu.

Deadline Information
The deadline date will be pre-populated as shown below.

General Proposal Properties
Answer the four questions below.

Deadline Information

Deadline Date   15-Jan-2026

General Proposal Properties

Will your proposal involve the use of Human Subjects?   ○ Yes ○ No

Will your proposal involve the use of Laboratory Animals?   ○ Yes ○ No

Will your proposal involve multiple principal investigators?   ○ Yes ○ No

Will your proposal be a training grant?   ○ Yes ○ No

Click the Save and Continue Button

**Note: If applying to an external sponsor you would be assigned a grants coordinator at this point. However, Grants coordinators are not assigned to URFO proposals. **

Navigation Menu

The proposal navigation menu is on the left and includes the following page tabs:
- Setup Questions
- Major Programs
- Budget
- Personnel
- Finalize

✓ Setup Questions

▶ Major Programs

Budget

Personnel

Finalize

Major Programs

<div style="border:1px solid #ccc">
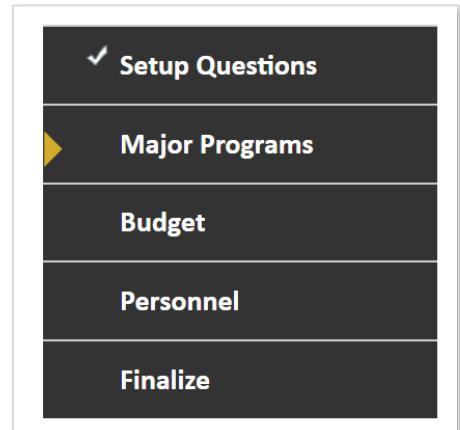
Major Programs

[Validate] ☐ **Complete**

Proposal Cover Sheet

PI:

| **Full Name** | **Title** | **Address 1** | **Address 2** | **Department** |

* Project Title:

[   ]

* Select Major Program: [⌄]

Abstract and Project Description

* Project Abstract (single spaced – 250 words maximum):

A) A statement of the significance of the problem and its impact on the field of study
B) A statement describing the interdisciplinary aspects (for the Interdisciplinary Research Initiation Award Program) or the innovative aspects (for all other major programs) of the proposed studies
C) A section outlining the specific goals of the project and how they will be accomplished
D) A description of the studies to be completed, including preliminary results if any
E) Expected outcomes
F) Plans for seeking additional funding

* Upload Project Description:

Other Required File Uploads

* Cited Literature References (2 single-spaced pages maximum):

Final Reports for any URFO awards for the past five years:

Additional Funding Questions

* Please describe your start-up package, if any (graduate students, postdocs, equipment, summer support, laboratory renovation, amount remaining, time remaining, etc.)

[   ]

* Please describe any additional non-URFO internal funding, current or closed, during the past three years.

[   ]

</div>

Proposal Cover Sheet
The PI's name, title, address and department information will automatically populate. The project title designated in the setup questions is editable here.

Select Major Program:
Chose the program you are applying from the dropdown menu:
- deArche Memorial Endowment Fund
- Research Awards and Fellowships – Arts, Music, History, Humanities
- Research Awards and Fellowships – Natural Sciences, Mathematics, Engineering, Technology
- Research Awards and Fellowships – Social Sciences, Social Services, Business, Economics, Education, Law
- Interdisciplinary Research Initiation Award Program
- Research Innovation Program

Abstract and Project Description

Click the upload image:

A popup window will appear, choose the file you want to upload then click the "Upload" button.
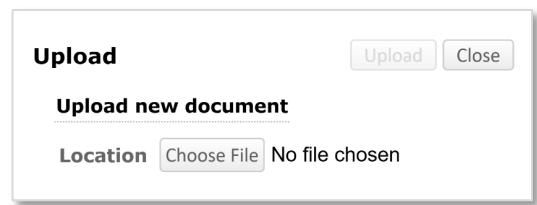
Other Required File Uploads

Upload your document(s) following the same steps as the Abstract and Project Description process above.

Additional Funding Questions

Answer the last two questions:

- Please describe your start-up package, if any (graduate students, postdocs, equipment, summer support, laboratory renovation, amount remaining, time remaining, etc.)
- Please describe any additional non-URFO internal funding, current or closed, during the past three years.

Click the "Validate" button and check the "Completed" box at the top right of the page.

Budget Navigation Menu

From the home menu, click "Budget." A new window will open with budget navigation menu on the left and includes the following page tabs:
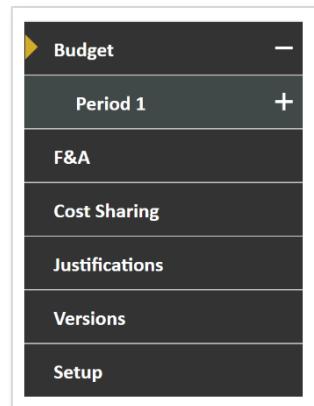
- Period 1
- F&A
- Cost Sharing
- Justifications
- Versions
- Setup

Budget Summary

Budget Summary							**Edit Mode**

Project Period: 15-May-2026 to 31-Dec-2026

Source View: Sponsor

Rollup subprojects: Not Rollup

Proposal Structure Import/Export Complete Budget

	Periods [hide]		Sponsor [show]	Cost Sharing [show]	Project [hide]		
Year/Period	Start	End	Total	Total	Directs	F&A	Total
1	15-May-2026	31-Dec-2026	-	-	-	-	-
			$ 0	$ 0	$ 0	$ 0	$ 0

Personnel

Add personnel:

In "Begin typing to select Personnel Name…" text box, type personnel name. A list of suggested names will appear, select the correct person you wish to add. If the personnel's name does not appear email InfoEd@UToledo.edu to have the person added to the system.

Once you select the appropriate person, select their type from the drop down menu:

- Key
- Non-Key

Then select their role:

- PD/PI
- Co-PD/PI
- Faculty
- Post Doctoral
- Post Doctoral Associate
- Post Doctoral Scholar
- Other Professional

- Graduate Student
- Undergraduate Student
- Technician
- Consultant
- Co-Investigator
- Other (Specify)

Click the "Add Person" button to add this person to your personnel budget. Their name will appear in the budget above with a "Detail" button to the left of their name.

Edit Personnel Budget Details

Next to the personnel's name click the "Detail" button. A new window will open:

Base salary, fringe benefits, and net salary will automatically be populated.

URFO Fellowships

Click the "Appointments" tab (see red box above), type the number of months to be paid and, from the dropdown menu, change the Fringe Benefits to OPERS/Part time/Fellowships (see red box above) to ensure a fringe benefits rate of 16%, as shown above.

When budget is complete, click the "Complete Budget" button at the top right corner of the page.

Click the "Save and Close" button to return to the Budget Summary page.

Non-Personnel

Multiple non-personnel items can be added through the "Add Bulk Entry" button (see red box above) or items can be added one at a time from this screen. Select the Budget Category from the drop-down menu:

- Publication Costs
- Purchased Services
- Supplies
- Travel-Domestic
- Travel-Foreign

Then select the Object Code from the drop-down menu.

**Note: Un-mapped object codes will not reconcile into budget categories.*

Click the "Save" button then click the "Done" button to return to the Major Programs Page.

Personnel

On the main navigation menu, click the "Personnel" tab.

The personnel information added through the Budget page should appear here. Review to ensure everything is correct, then check the "Completed" box in the top right corner (see red box above).

Click the "Save" button then click the "Done" button to return to the Major Programs Page.

Finalize

Once all documents are uploaded and the budget is complete, with all sections checked 'complete', the application can be finalized.

On the main navigation menu, click the "Finalize" tab.
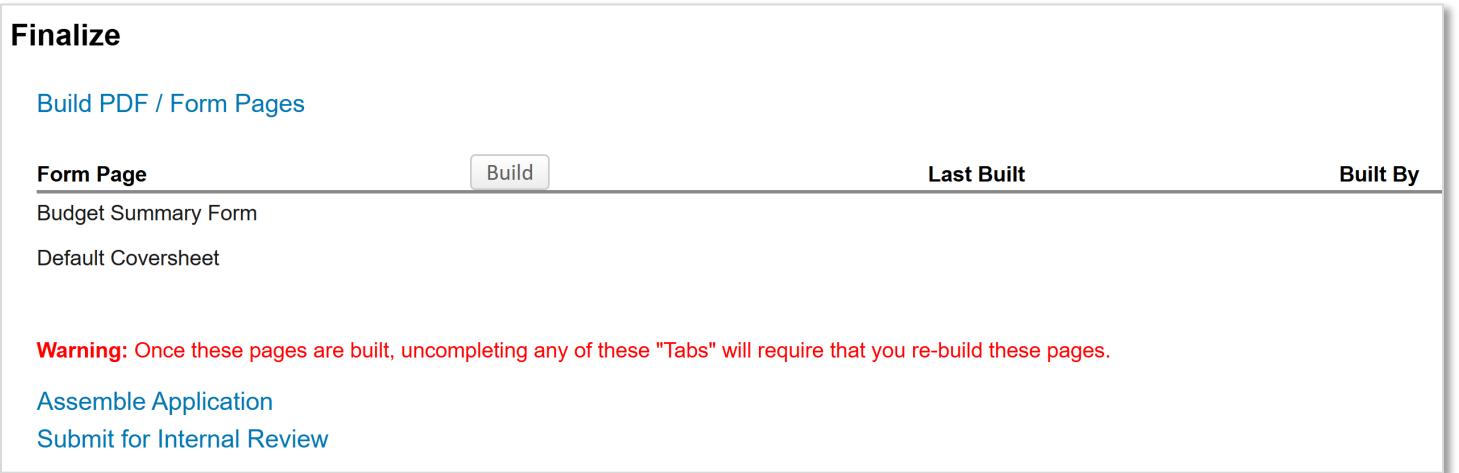
Build Application

Click the "Build" button. The system will build the application pages with a hyperlink "view" option to review and ensure everything is correct. If anything needs to be updated or corrected, you will need to go back uncheck the "completed" box, make the edits, re-check the "completed" box, then return to the finalize tab to rebuild the pages.

Assemble Application

Assemble Application
Submit for Internal Review

Once your proposal has been completed, it can be electronically routed internally for approval. This section potentially supports both Pre-Review and Final routing. The Submit button for Final routing appears when the record has not been submitted for final review and is not visible when the record is in final review.

Current Proposal Status: **Initiated in PD (GC Unassigned)**

Components for **Initial Application**   Pre-Review Route: [URFO Maj Progs Chair/Dean End. ∨] [Submit]
                                                              Current Submission

FORM/DOCUMENT NAME	VIEW	STATUS	UPLOAD	REMOVE
Assembled Doc	🔍	Completed	🔃	

Add Institution Forms/Supporting Documents

Click "Assemble Application" hyperlink.

Submit for Pre-Review Route

Click the "Submit" button Pre-Review Route (see red box above).

Certification

A certification window will open.

Certification   [Close]

I certify by signing below that:

- In the case of submissions to the National Institutes of Health, I have read and agree to abide by the NIH Grants Policy Statement (GPS), Section 2.5.1 "Just-in-Time Procedures", and understand the Other Support disclosure requirements. I understand my responsibility to disclose all resources made available to me in support of and/or related to all of my research endeavors, regardless of whether or not they have monetary value and regardless of whether they are based at The University of Toledo.
- In the case of submissions to the NSF, DOE, or NIH, I have completed the relevant CITI Research Security training.
- I have read and agree to abide by current University policies on conflicts of interest (3364-70-01), patents (3364-70-04), biohazardous materials (3364-70-06), and the use of human subjects (3364-70-05)/vertebrate animals (3364-70-10) in research, cost-sharing, and other University research policies as appropriate. I certify that the required actions regarding compliance with these policies have been taken.
- I have read and agree to abide by the University Policy on Integrity in Research and Scholarship and Procedures for Investigating Allegations of Misconduct in Research and Scholarship (3364-70-21).
- I will refrain from knowingly conducting activities that may constitute or result in the infringement of any patent, copyright, or other legal right during the project.
- I agree to provide a complete, accurate and truthful disclosure for this project as required by current UToledo policy and/or other regulations. I agree to disclose promptly to the Research and Sponsored Programs Office (i) any significant financial interest, as defined in chapter 510 of the National Science Foundation Grant Policy Manual, that would reasonably appear to be affected by the sponsored

○ Accept   ○ Decline

[Continue]

Make your selection then click the "Continue" button.

Routing for Internal Review

Proposal **P-601325 -**   "Project Title" (Initiated in PD (GC Unassigned))

Refresh Route

Route Path - **URFO Maj Progs Chair/Dean End.** Add New Person to Review Path   Submit

Step 1	Submission Received to PI	Information Only	Insert After
Step 2	Administrative Review	Approval Required	Insert After
Step 5	Chair(s)/Dean(s) Endorsement	Information Only	Insert After
Step 6	Endorsement Comment Check	Approval Required	Insert After
Step 7	Inform PI	Information Only	Insert After

No comments have been recorded yet

Click the "Submit" button (see red box above) to begin the routing process for Internal Review. You will be taken back to the Finalize page. From here you will be able to check where the applications is at in the routing process (i.e., what step/who is next to approve).

You will receive a confirmation email:

Greetings

Your URFO major program proposal P-601325 titled "Project Title" has been received. The next step will be a pre-endorsement review by the URFO administrator to ensure compliance with program guidelines, followed by endorsement steps for you (if you did not submit it), your key personnel, and your department chair and the department chairs of your key personnel. Associated deans will receive an FYI email.

Upon completion of all endorsement steps the proposal will be considered submitted. You will be notified promptly upon completion of endorsement review. During the endorsement process you can track the progress of the proposal on the "Finalize" tab.