UAccess Research (UAR) Proposal Data Guide

Minor - Sponsored Projects & Contracting Services (SPCS) may make routine corrections in UAR with a note about the changes. Minor changes to proposal content for sponsor submission, including the budget and justification, are discussed and executed with the PI, initiator or business officer. SPCS may use data override, replace existing attachments or Return for Edit via Super User approval. No re-routing is required.

Major - SPCS will return the return the proposal to the initiator to make changes & re-route for all approvals. Submission queue priority is not retained.

* Asterisk indicates system-validated UAR data is required to route the proposal.

? Question mark indicates a possible categorization, depending on the situation. Refer to the Additional Guidance column for more information.

UAR Panel	UAR Field Label	Minor (SPCS may correct, without re-routing)	Major (must be re-routed)	Additional Guidance
Proposal tab				
Required Fields for Saving Document	* Sponsor Code	X		Enter the pass-through entity if UA is a subrecipient, not the prime applicant.
	* Proposal Type	X		See Types of Proposals for descriptions.
	* Lead Unit		X	To change the Lead Unit, copy the proposal and re-route for all approvals.
	* Activity Type	X		
	* Project Title (Title Case formatting is recommended for high quality reporting)	?		**Do not recall for title changes** during routing. Add a note and SPCS can edit during final review. SPCS will not correct formatting or title changes after review.
	* Project Start Date	?		SPCS will not correct Project Start/End Dates if duration is accurate and within 6 months of submitted application dates.
	* Project End Date	?		
Institutional Fields Conditionally Required	Award ID	X		Enter for ***Revision*** , ***Renewal*** or ***Admin Change*** Proposal Types.
	Original Institutional Proposal ID	X		Enter for a ***Resubmission*** Proposal Type.
Sponsor & Program Information (Most data on this panel is optional and immaterial but helpful during SPCS final review and submission.)	Sponsor Deadline Date	X		Hard ***Receipt*** deadlines are prioritized if all **UAR approvals and final forms/submissions reach SPCS 3 business days before the UA deadline**. If ***Target*** , add a UAR note explaining the UA hard deadline. If a Sponsor Deadline Date changes, contact SPCS to update UAR.
	Sponsor Deadline Time (Arizona Time)	X		Enter deadline time if it is before SPCS close of business.
	Sponsor Deadline Type	X		**Receipt** = sponsor-required. If date is a **Target**, add a UAR note to provide the hard deadline after which submission will not be accepted.
	Notice of Opportunity	X		Select if applicable; ex: CAREER, DURIP, MRI, SBIR, STTR, SIG, YIP...
	Prime Sponsor ID	X		Enter if UA Sponsor funds originate from a different entity.
	CFDA Number			Enter for federal/sub-federal projects if CFDA is known.
	* NSF Science Code			Self-identify all projects for the NSF HERD Survey.
	Does this proposal include subaward(s)?			Check this box if project budget includes an outgoing subaward.
	Opportunity Title			It is helpful to provide the funding program name and/or URL.
Key Personnel tab				
Person Details	Person		X	1 PI (NIH PI/Contact) is required. **Include all Sr. Key Personnel.**
	Proposal Person Role Non-NIH: PI, Co-I or Key Person (enter role **and Unit Details for routing**.). NIH: PI/Contact, Co-I (Multi-PI checkbox), Key Person (enter role **and routing depts.**).	?	X	SPCS will fix with no re-route if a Co-I should be an NIH Multi-PI. Changes to Co-I(s) with Award Credit and/or F&A Revenue must re-route. Removing Co-Is with 0% Award Credit and 0% F&A Revenue may not re-route. A **Key Person** entered with a custom role description **must have manually-added Unit Details** in order to route correctly to departments/colleges if the key person is mentoring or devoting project effort.
	(Person) Percentage Effort			Campus may choose to enter data but SPCS will not make corrections or verify accuracy. **This data is imported into UA Vitae.**
	eRA Commons User Name (used for S2S)			SPCS finds this data helpful if the Sponsor is NIH.
Unit Details	Unit Number/Name		X	Fields are required for PI & Co-Is but optional for Key Persons. Add Unit Details manually to route to Key Person Units and Colleges. **Collaborating faculty may have multiple units** or special credit splits. Verify in advance with all collaborating business offices. **Any change to credit splits requires re-routing** OR add a note that an *Administrative Change ($0)* proposal will route before an award is accepted.
Combined Credit Split	Credit for Award		X	
	F&A Revenue		X	
Special Review tab				
Special Review	Special Review Type (Human or Animal)	X		Add Human or Animal Subjects and a UA protocol number, if applicable . SPCS may note in Proposal Development and fix in Institutional Proposal if there is no other reason to 'return for edit.'
	(Sp Rvw) Approval Status/Protocol Number	X		

UAccess Research (UAR) Proposal Data Guide

Minor - Sponsored Projects & Contracting Services (SPCS) may make routine corrections in UAR with a note about the changes. Minor changes to proposal content for sponsor submission, including the budget and justification, are discussed and executed with the PI, initiator or business officer. SPCS may use data override, replace existing attachments or Return for Edit via Super User approval. No re-routing is required.

Major - SPCS will return the return the proposal to the initiator to make changes & re-route for all approvals. Submission queue priority is not retained.

* Asterisk indicates system-validated UAR data is required to route the proposal.

? Question mark indicates a possible categorization, depending on the situation. Refer to the Additional Guidance column for more information.

UAR Panel	UAR Field Label	Minor (SPCS may correct, without re-routing)	Major (must be re-routed)	Additional Guidance
Custom Data tab				
Location of Research Activities	Banner - Tucson, South or Phoenix			SPCS does not verify accuracy of Banner location data.
Project Information	* F&A Rate % (ex: 53/53.5)	X		SPCS may add a Proposal Development note & correct the Institutional Proposal if there is no other reason to 'return for edit.' Enter the previous project account if a new, separate proposal is 'follow-on' work to a previous project.
	* Project Location (ex: Bldg-Rm-Other)	X		
	Follow-on to Account No.	X		
Abstracts & Attachments tab				
Attachments (all panels)	* Attachment Type (all)	X		Most proposals require an **abstract**, **budget** and **justification**. Attach the same for each **outgoing subaward**. Attach all letters of financial commitments (**cost share**). Attach any **documents for SPCS signature**; ex.: cover page, subrecipient commitment form, intent to subcontract, certs... Attach an **F&A waiver** request or published **stipulation** for any reduced rate.
Notes	Notes			Add notes as needed. Notes cannot be edited or deleted. Note the **UAR Negotiation ID** (NID) if the award is already received.
Questions tab				
Proposal Questions (Complete)	Proposal Questions (all)	X		Answer for each proposal. Verify answers in copied proposals. Add a Special Review entry for **Human or Animal Subjects** involvement. **Reduced F&A** rates require documentation in the Attachments panel.
(Budget) Parameters tab - 'Open' budget version(s) from the (Proposal) Budget Versions tab.				
Budget Overview	Project Start Date (defaults from proposal)	?		SPCS will not correct Project Start/End Dates if duration is accurate. Dates display as entered in proposal. Adjust budget period dates after making proposal date changes.
	Project End Date (defaults from proposal)	?		
	Budget Status			One budget version must be ***Final*** to turn on validation. Then **'save'** and budget status must be ***Complete*** before you can 'submit' to routing. Budget Status and *Final* can also be changed from the Budget Versions tab.
	Final?			UAR budget validation is turned on when this box is checked.
	Unrecovered F & A Rate Type			Always leave the default value of MTDC. SPCS will not correct errors.
	F&A Rate Type	X		Select MTDC or TDC as applicable. All UA federally-negotiated rates are MTDC.
	On/Off Campus	?	X	Re-route major budget differences if incorrect rates are used. SPCS may fix data entry errors if budget calculations are correct.
Budget Periods & Totals	Direct Cost (per period)	X		Enter Total Direct Cost (TDC) and F&A cost for each period. UAR automatically sums the Total Cost. Add and adjust default budget period row dates as needed.
	F&A Cost (per period)	X		
	Total Cost (per period, UAR calculation)	X		
	Cost Sharing (over cap or math errors)	X	?	See comments about cost sharing below.
(Budget) Rates tab				
Rates (all types)		?		SPCS reviews Budget rates only if UAR budget builder is used. SPCS corrects significant errors in Parameters tab totals if the UAR budget builder is not used. **'Sync all rates'** to fix budget rate warnings if Activity Type changes.
(Budget) Distribution & Income tab				
Cost Sharing (Cost Sharing amounts entered in Budget Periods & Totals must be distributed to valid Cost Sharing Source Units to be routed correctly.)	Source Account (text description)			This is optional. Ex.: 3rd Party, Forgone F&A
	Cost Sharing Amounts	?	X	Increases: SPCS may re-route only to depts & colleges of lead and increases. Decreases: SPCS will add a proposal note with no additional approvals if decrease is proportional across cost sharing units. Removal: SPCS can fix 100% cost share removal with no additional approvals. Source Unit: Use a lookup to search for cost share unit numbers. Examples: *3RDPARTY* , *RSDV* (not 9906 for RDI commitments)
	Cost Sharing Source Unit	?	X	
Permissions tab				
Assigned Roles and Users	User name, home unit and (proposal) role			These users and roles apply to one UAR proposal document. Aggregators can view or modify the entire proposal.