



ONLINE PSR USER GUIDE

Help icons are available within the Online PSR for more detailed information.

Initiating Online PSR

- Access Online PSR by logging into *infoEd*: era.cu.edu.
 - Choose Boulder campus from the dropdown menu and enter the user's identikey credentials.
- Select "Sponsored Projects" from the left navigation
- Select "Create New: Proposal Submission Request (PSR)" and enter the following information:
 - **PI Name - type and select PI name**
 - Select the listing for PI that corresponds to the unit that will be managing the award. This selection determines routing of the Online PSR form to the correct Proposal Analyst.
 - **Proposal Type - select the proposal type**
 - **Sponsor – enter the name of the organization that will directly fund CU**
 - If applying directly to the Sponsor, indicate the Sponsor's name.
 - If this is a subaward from another organization, indicate that organization's name.
 - If the appropriate sponsor is not found, select "Default Sponsor" and notify your Proposal Analyst.
 - **Proposal Title**
 - Enter the complete proposal title, making sure to follow any naming instructions from the funding announcement. If the title changes after submission of Online PSR form, please inform your Proposal Analyst.
 - **Project Start/End Dates**
 - Enter the project start and end dates, mm/dd/yyyy, and verify these are compliant with sponsor guidelines.
 - If the project period is adjusted after submission of Online PSR, please inform your Proposal Analyst.
 - **Select "Create Proposal" button**
 - The record is not initiated until this step is completed

Instructions Tab– Setup Questions

- **Human Subjects** – Yes or No
 - If Yes, additional questions requiring answers will appear in the Compliance Tab.
- **Laboratory Animals** – Yes or No
 - If Yes, additional questions requiring answers will appear in the Compliance Tab.
- **Associated Departments**
 - Associated department will default to PI department selected during initiation process.
 - Click "Add" if indirect costs will be allocated to any unit in addition to the PI's primary department and begin typing the additional department name or org code. Select correct additional department.

Click the "Complete" checkbox at the top right of the screen when page is completed.

Budget and Project Information Tab

Submission Information

- Information provided during initiation will display including Title, Sponsor and Project Dates.
 - The above fields are editable until completion of the "Build and Submit" step.
- **Funding Opportunity Number**

- List funding opportunity number (ex: PA-23-272, NSF 23-506, etc.).
- **Program/Opportunity Title**
 - Enter title of opportunity announcement (ex: NIH Research Project Grant (Parent R01 Clinical Trial Not Allowed), Faculty Early Career Development Program (CAREER), etc.).
 - Enter “N/A” if there is no program descriptor or if this is an unsolicited opportunity.
- **Project Sponsor**
 - Enter name of funder that will directly fund CU.
- **Prime Sponsor**
 - Enter name of Prime Sponsor (where funding originates) if CU is participating as a subrecipient.
- **NSF Collaborative Proposal** – Yes or No
 - If Yes, identify the institution which will submit the most substantive portion of the proposal to the sponsor. This is the organization that will be in charge of submitting the primary proposal documents. NOTE: a collaborative proposal is NOT a subaward to/from CU.
- **Firm Deadline** – Yes or No
 - Enter submission deadline to CU’s sponsor. For proposals where CU will be a subrecipient, enter the date by which the lead institution needs all subaward documents.
- **Submission Method**
 - Select how proposal will be submitted. For proposals where CU will be a subrecipient, select Email.
- **Project Topical Field**
 - Make most appropriate selection from the dropdown.

Budget Information

- **Indirect Cost Rate Cap** – Yes or No
 - If Yes, enter sponsor’s rate.
- **Cost Share** – Yes or No
 - If Yes, select Mandatory or Voluntary.
- **Course Buy-outs** – Yes or No
- **Fabrication** – Yes or No
- **Indirect Cost Recovery Split** – Yes or No

Project Information

- **Research Activity** – Yes or No
 - If No, categorize the majority of the work.
- **Off-Site Research** – Yes or No
- **Space changes, renovations or additional infrastructure** – Yes or No
- **Financial Interest** – Yes or No
- **Controlled Unclassified Information** – Yes or No
- **Submitted to Other Sponsors** – Yes or No
 - If Yes, indicate sponsor.
- **Historic Place** – Yes or No
 - If Yes, indicate location.
- **Impact on Environment** – Yes or No
 - If Yes, indicate impact.
- **International Collaborators** – Yes or No
 - If Yes, indicate collaborators.

Subrecipients

- Does project involve participation of **Subrecipients**
 - If Yes, provide organization and contact information (email) for Subrecipient PI and administrative contact.

Other Information

- Add any additional details in comments box as needed.

Click the “Complete” checkbox at the top right of the screen when page is completed.

Compliance Tab

Compliance Considerations

- **Human Subjects** – Yes or No
 - Indications made on Instructions Tab will display here and can be modified.
 - If Yes, answer/enter additional pop-up questions.
- **Vertebrate Animals** – Yes or No
 - Indications made on Instructions Tab will display here and can be modified.
 - If Yes, answer/enter additional pop-up questions.
- **Intellectual Property (IP) and Confidential/Proprietary Information (CI)** – Yes or No
 - Indicate IP considerations associated with project activities.
- **Environmental Health and Safety (EH&S)** – Yes or No
 - Enter additional information as necessary.
- **Controlled Substances Used for Research** – Yes or No
 - Indicate any controlled substances or industrial help identified in the proposal.
- **Export Control Assessment**
 - Identify if the project has any Restricted or Controlled activities that would warrant export control review.

Click the “Complete” checkbox at the top right of the screen when page is completed.

Personnel Tab

- **Add only CU Boulder Co-PI(s) or Co-I(s)**
 - Add additional CU Investigators by entering last name.
 - Select appropriate profile with correct org code and role (Co-PI or Co-I only)
 - Do not add any other role
 - To remove personnel, select the “Remove” icon in the far-right column of the personnel row.
 - Do not upload documents to CV/Biosketch or Current/Pending Support fields.
 - Select the “Save” button to add personnel to the Online PSR record.

Click the “Complete” checkbox at the top right of the screen when page is completed.

Sponsor Assurances Tab

- **Disclosure of External Professional Activities (DEPA) and Other Support Assurances**
 - Acknowledgements about required DEPAs, responsible conduct of research trainings, and disclosure of Other Support is required for PSR submission. It is the responsibility of the PI to ensure appropriate disclosures and trainings are completed. If the PSR is submitted by someone other than the PI, the PI accepts these acknowledgements when they certify/approve the Online PSR
 - The questions identifying NASA funding or NIH fellowship activity must be answered and additional questions will appear if the response is “Yes”.

Click the “Complete” checkbox at the top right of the screen when page is completed.

Attachments Tab - optional

- **Draft documents including Statement of Work and Budget, Funding Opportunity and other supporting documents may be uploaded, but are not required.**
 - NOTE: Draft documents and final proposal documents must be emailed directly to the Proposal Analyst.

Click the “Complete” checkbox at the top right of the screen when page is completed.

Build and Submit PSR Tab

- All pages must be completed with checkmarks before completing this step.
- Under “Assemble Application”, click the “Build” button.
- Under “Submit for Internal Review”, click the yellow thumbs up icon next to “Submit Final Review”.

- **Complete certifications and once Accepted, click “Continue”.**
- **Check Route Path to ensure Online PSR is routing to correct individuals:**
 - **Route to the PI if being filled out by someone other than the PI for certification/approval, or**
 - **Route to OCG-assigned Proposal Analyst based on primary org code identified on the Online PSR. If correct Proposal Analyst is not listed, go back to Instructions Tab and correct the Primary Department listed within Associated Departments.**