Research Administration Services

RAS Proposal Preparation Toolkit Introduction

In an effort to continue to standardize best practices across all of Research Administration Services (RAS), we have developed a Proposal Preparation Toolkit. This toolkit is designed to be used for training, best practices and standardization within each RAS Unit and across all RAS Units.

The items in the toolkit are very NIH centric due to Emory University's research portfolio being 80% NIH funded. Many of the items in the toolkit are customizable for any sponsor or for your specific Unit's needs. The toolkit is designed to provide guidance and tools to be utilized throughout the entire proposal preparation process. The toolkit consists of the following items to assist in the proposal preparation process:

Document Title	Description/Purpose	Relevant SOP	Source
1. Proposal Preparation Email Templates **a. New PIs** **b. Current PIs**	Follow up email templates to send a PI once the intent to submit is received.	SOP 1001	Best practice tool created based on sample proposal preparation emails provided by RAS Pre Award Administrators.
2. Proposal Preparation Checklist	Checklist for preparing a full grant/contract proposal.	SOP 1002 SOP 1003	Best practice tool created based on sample proposal checklists provided by RAS Pre Award Administrators.
3. Grant Proposal Budget Review Overview/Checklist **a. Federal Budget Template** **b. Non-Federal Budget Template** **c. NIH Budget Template**	Overview of how to create together a grant/contract budget with a checklist and sample federal, non-federal and NIH budget templates.	SOP 1004	Best practice tool commonly used by RAS Pre Award Administrators.
4. Comprehensive F&A Rate Guidance	Guideline to assist research administrators in selecting the appropriate F&A rate type.	SOP 1004 SOP 1005	Created by Finance - Cost Studies as an action item out of Pre Award Vision – updated March 2016
5. Subcontract Commitment Form and Institutional Profile	Form that must be completed at the proposal phase providing information on	SOP 1002 SOP 1003	Created by OSP as a part of the new Subrecipient Monitoring Program at Emory, effective October 1, 2015

	proposed subcontractors.		
6. EPEX Checklist	Checklist to assist in creating a new proposal in EPEX.	SOP 1002 SOP 1003	Best practice tool commonly used by RAS Pre Award Administrators.
7. EPEX Attachment Information	Guidance document to assist in defining what attachments are required in EPEX.	SOP 1002 SOP 1003	Developed by C&I RAS as a best practice and training tool.
8. Answering EPEX Questions Guidance	Guidance document to assist in answering the required questions in EPEX.	SOP 1002 SOP 1003	Developed by C&I RAS as a best practice and training tool.
9. High Level Proposal Review	Checklist for a final quality review of the proposal preparation process before submission through EPEX.	SOP 1002 SOP 1003	Best practice tool commonly used by RAS Pre Award Administrators.
10. NIH Proposal Submission Confirmation Email Template	Follow up email template to send to a PI once thee proposal has been submitted to ensure PI conducts a quality review of proposal document in eRA Commons.	SOP 1002 SOP 1003	Developed by C&I RAS as a best practice and training tool.
11. RAS/SOM Approval List (RAS SOM Units Only)	Detailed list of approvers for various pre and post award functions.	SOP 1002 SOP 1003 SOP 1004 SOP 1005	Developed by SOM Business and Finance Research office to provide guidance and clarification on when SOM needs to approve various functions.