

Purpose

The following guide is intended for those who are looking to review and certify a proposal.

Review and Certify a Proposal: Instructions

1. Open the Proposal

Click the proposal ID link provided in the PI Certification Required email notification.

Alternatively, from your PAM inbox, click the name of the proposal you want to open.

My Inbox		
Filter by ?	ID	Enter text to search
ID	Name	Date Created
FP00000003	BD SF424 Test 10.29.24	10/29/2024 9:51 AM

2. Review the Proposal

Review the tabs on the proposal workspace, including the:

- Attachments tab (e.g., Statement of Work)
- Financials tab to review the budget summary
- Related Projects tab to ensure any IRB or IACUC protocols associated with the funding proposal are present

Click **View Funding Proposal** to review detailed information included in the proposal SmartForm.

Budgets

SF424 Summary

History

Reviewers

Attachments

Working Budgets

Financials

Reviewer Notes

Related Projects

Change Log

...

Draft

Next Steps

[View Funding Proposal](#)

[Printer Version](#)

[COI Disclosure Status](#)

[Submit For Department Review](#)

[Certify](#)

- Instructions continued on next page -

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3. Click Certify

Once you complete your review of the proposal, certify that it is complete and accurate.

On the proposal workspace, click Certify.

The image shows a 'Draft' proposal workspace. It has a yellow header with the word 'Draft'. Below it, under 'Next Steps', are two buttons: 'View Funding Proposal' and 'Printer Version'. Further down is a link for 'COI Disclosure Status'. At the bottom, there are two links: 'Submit For Department Review' and 'Certify'. The 'Certify' link is highlighted with an orange box and a red circle with the number 3.

4. Submit Certification

Read the attestations in the Certify form.

Click OK.

The image shows the 'Certify' form. It has a title bar 'Certify'. Below it is a note: '(This is the default language that is updated on Grants>Settings>General)'. The main text says 'As PI for this project, I certify the following:'. There are six numbered statements for certification. Below the statements is a '1. Comments:' section with a text box. Then there is a '2. Attachments:' section with an '+ Add' button and a table with a 'Name' header. Below the table, it says 'There are no items to display'. At the bottom right, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with an orange box and a red circle with the number 4.

5. Check Certification Status

In the Proposal Information summary, verify the Certified field updated to **Yes**.

If more than one person is required to certify, the status will show how many certifications are complete.

The image shows a 'Proposal Information' summary table. It has a title bar 'Proposal Information'. The table has two columns. The first column lists fields: 'PD/PI:', 'Department:', 'Specialist:', 'Sponsors:', 'Internal Submission Deadline:', and 'Certified:'. The second column lists the corresponding values: 'David Mayo', 'Office of Research Administration', 'David Mayo', 'NATIONAL INSTITUTES OF HEALTH', '11/26', and 'Yes'. The 'Certified:' row is highlighted with an orange box and a red circle with the number 5. Below the table, there is a 'Certifications Complete:' section with a progress bar showing '1 of 2' and a red circle with the number 5.

✓ You have now completed the Review and Certify a Funding Proposal process.