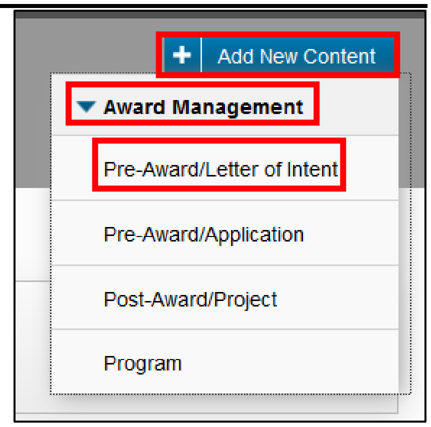
Creating a Pre-Award/Letter of Intent (LOI)

Purpose: Some grants require prospective applicants to submit a letter of intent prior to submitting a full grant application. In these cases, the LOI may be prepared and submitted using RMS. Note: not all every grant requires a LOI. Check the grant description for specific requirements and deadlines regarding LOI.

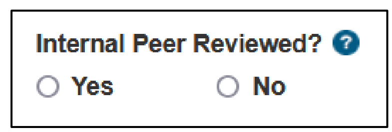
Audience: PI, Co-I , Designate or Team Member

Note: This process can be done on behalf of the PI by team members or designates with a few minor differences which are identified throughout this document.

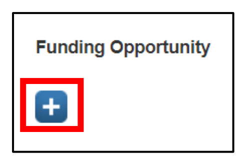
Step 1:
Click **Add New Content → Award Management → Pre-Award/Letter of Intent**



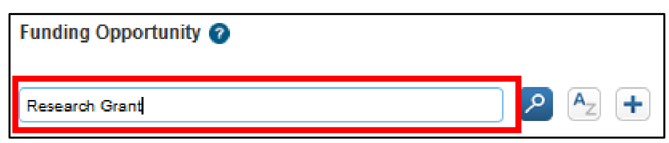
Step 2: (Optional)
Answer the Internal Peer Reviewed question. This is not a mandatory field.



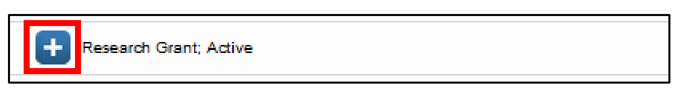
Step 3:
Click the **plus icon** under Funding Opportunity to add the Funding Opportunity.



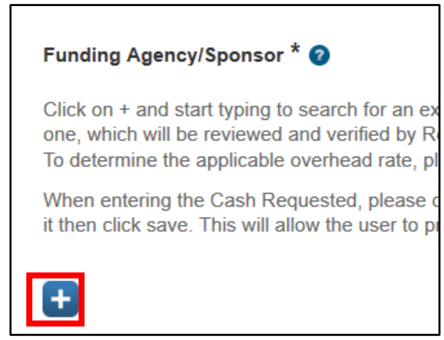
Search for the funding opportunity. You can type the name in the search field, or to browse all funding opportunities, click the **A-Z icon**. The list is sorted alphabetically by funding opportunity, not the agency or sponsor.



Click the **plus icon** beside the funding opportunity to add it to the record.

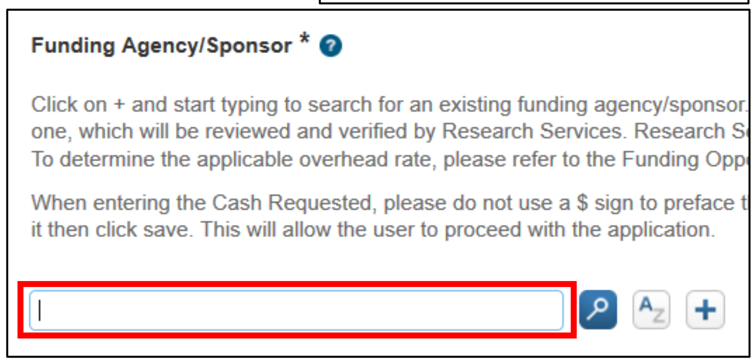


Note: If the Funding Opportunity has a Funding Agency/Sponsor connected to it already, the <u>Funding Agency/Sponsor</u> section will autopopulate and you do not need to add one. If it does not autopopulate, click the Save button to force that function.



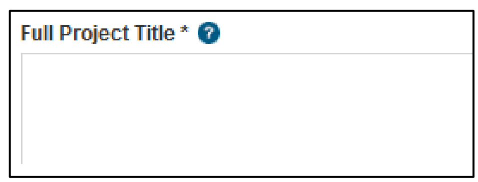
Step 4:
To manually add a Funding Agency/Sponsor, click the **plus icon** under Funding Agency/Sponsor to add the source of funds.

To search for a specific source, type the name in the search field, or to browse all sources, click the **A-Z icon**.



Click the plus icon beside the source to add it to the record.

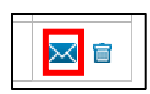
Step 5:
Enter the title of the project.



Step 6:
If you are the PI, verify your name and affiliation is correct under **Principal Investigator/Lead UofC Applicant.**

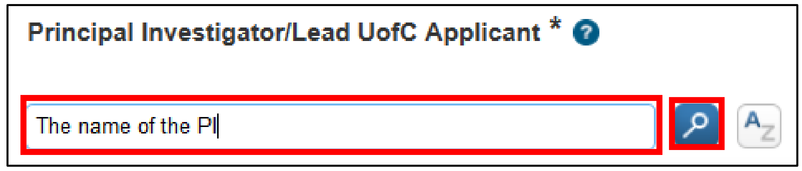
Note: If you are not the Principal Investigator, remove yourself from the PI position by clicking the trash can icon to the right of your name.

If you are creating this award on behalf of the PI, or if you need to change your affiliation, remove yourself from the Principal Investigator role by clicking the **trash can icon** to the right of your name. (The system automatically puts the creator of the record in the PI spot.)

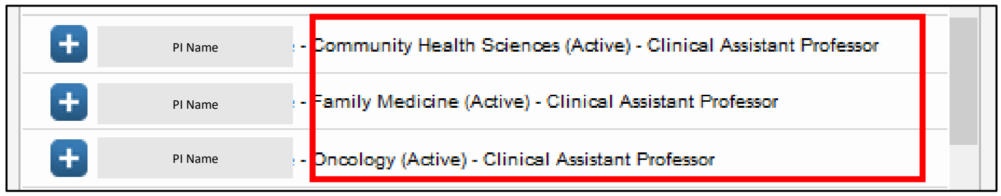


Step 7:
To add the correct PI, click the **plus icon** under Principal Investigator/Lead UofC Applicant.

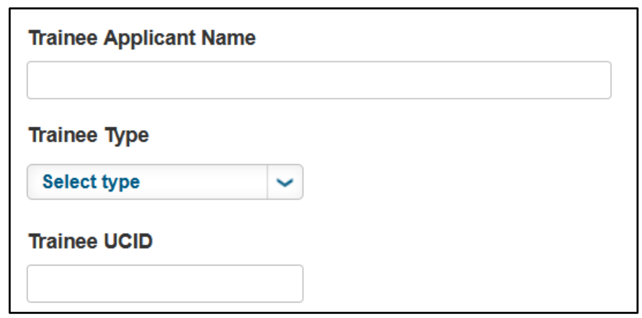
Type the name of the PI and click the **search icon**.



In the list of names, choose the name with the correct work affiliation for this project. Click the **plus icon** beside that name.

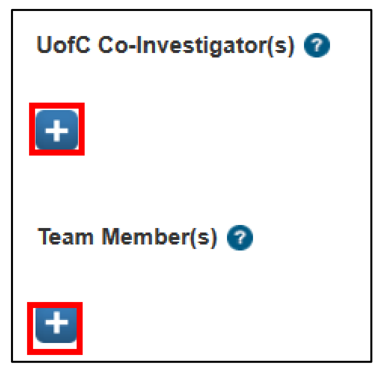


Step 8:
If the award is in a trainee's name, e.g., a studentship or fellowship, provide information about the trainee. Otherwise, leave these fields blank.

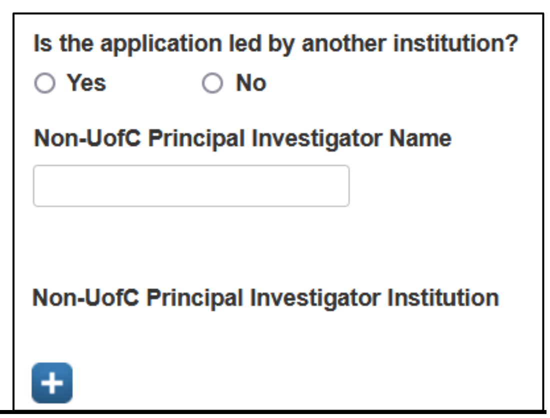


Step 9:
Add any UofC Co-Investigator or UofC Team Members. Use the same method as above to add people.

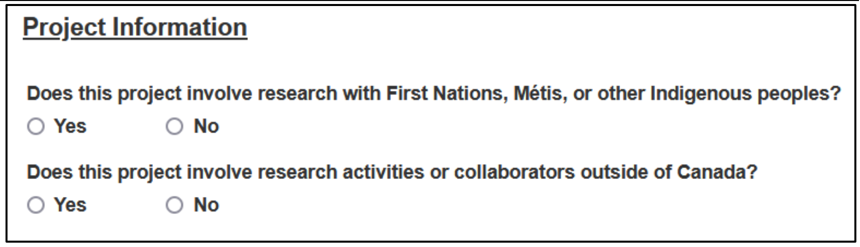
Note: If you are not the PI, you need to add yourself to the record as a Co-I or Team Member in order to maintain access to the record after saving or submitting it.



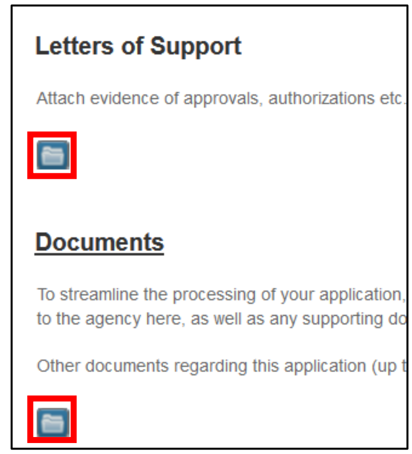
Step 10:
If the application is led by another institution, provide information about the non-UofC principal investigator. Otherwise, leave these fields blank.



Step 11:
Answer the two Project Information questions.

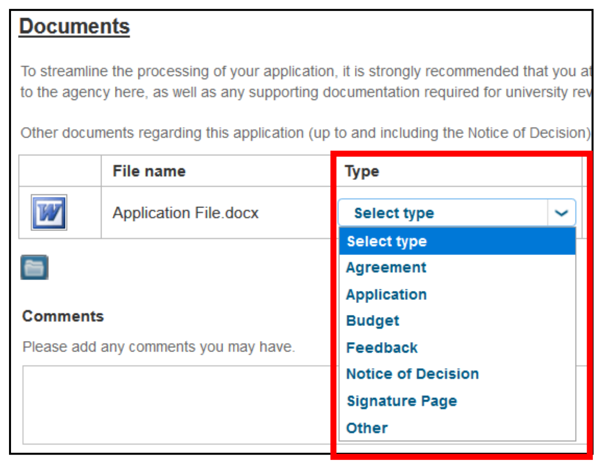


Step 12:
Upload any Letters of Support and/or Documents that need to be attached with your LOI. Upload files by clicking the **folder icon** under the appropriate heading.



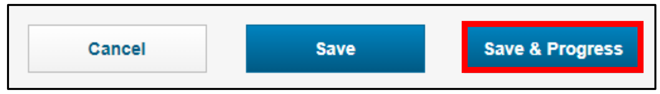
From the file upload pop-up, select the file you want to upload.

For files uploaded to the Document section, select the appropriate file type under the **Type** drop-down menu.



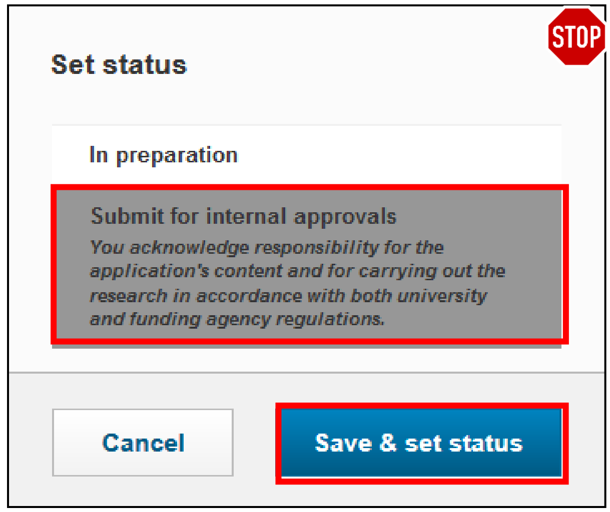
Step 13:
You can add cooments about your application/LOI to the Comments section. These can be seen by anyone who has access to the record including Co-Investigators, Team Members, Approvers, RSO, etc.

Step 14:
When all required information is added, click S**ave & Progress.**



Step 15:
Set the status to Submit for internal approvals. Then click **Save & set status.**

Note: Ensure you click "Submit for internal approvals" before Save & set status or the record will remian "In preparation"



The Pre-Award/LOI will be sent for academic review and approvals. You can check back on the status of the approvals by returning to the record and clicking on the **Approvals & review** tab.

Note: If this record was created by and/or submitted for approvals by anyone but the PI, the PI will also need to provide approval prior to it going for Academic Approvals.