Iterative Review Process – Instructional Guide

Table of Contents

1. Replace an existing file with a new file for Iterative Review

Validate	**Upload New Files**	

Uploaded Files

File Name	File Type	Uploaded Date	Uploaded By	Actions
▼ Attachments (5)				
projnarrative.pdf	Project Narrative	2/2/2021, 04:07:55 PM (EST/EDT)	Robinson-PI	•••
supportingdocs.pdf	Supporting Documentation	2/2/2021, 04:08:31 PM (EST/EDT)	Robinson-PI	•••
techabstract.pdf	Technical Abstract	2/2/2021, 04:08:31 PM (EST/EDT)	Robinson-PI	•••
layabstract.pdf	Lay Abstract	2/2/2021, 04:07:54 PM (EST/EDT)	Robinson-PI	•••
sow.pdf	Statement of Work	2/2/2021, 04:07:55 PM (EST/EDT)	Robinson-PI	

Replace File ①

Edit File Info

► **Key Personnel (4)**

► **Budget (2)**

► **Performance Sites (1)**

► **Other (0)**

① If you have received an email stating that your application is opened for iterative review, go to your application and open the "Full Application Files" tab. If you need to replace a file that you previously submitted, click on the actions icon ••• and click on "Replace File". The Replace File Section will open.

Full Application Deadline: 2/2/2021, 04:15:59 PM (EST/EDT) **Verification Deadline:** 2/2/2021, 04:16:00 PM (EST/EDT)

| Summary | Contacts | Full Application Files | Application and Budget Data | Verify Full Application | Requested Info |

Full Application BG200077   **Status: DRAFT**

Application Title: Basic Research Award-CSL for Iterative Review
Award Mechanism: Basic Research Award
Mechanism Option: Basic Research

Review each category to verify accuracy. New files can be uploaded, and any file can be deleted, replaced, or edit file category. Select the "Validate" button to check that all required files conform to the specifications of the Funding Opportunity/(Program Announcement)   [Validate]

Replace File   ✕

NOTE: The newly uploaded file will replace the version previously uploaded.

	File Type: **Statement of Work** File Group: **Attachments** ②
⬇️ Drop File Here OR (Choose File)	**ProjectNarrative.pdf 85 KB** ✕

3 page limit - Allowed File format: PDF - Required
Maximum File Size: 90 MB   [Cancel] [**Upload**]

---

② In the Replace File Section, select a file to upload. The selected file will appear on the right side and the File Type and File Group will be preselected. Click the **Upload** button. When the upload is complete, you will see a message on screen that your upload was successful.

Uploaded Files

File Name	File Type	Uploaded Date	Uploaded By	Actions
▼ **Attachments (7)**				
ProjectNarrative.pdf Revised!	Project Narrative	2/2/2021, 05:23:08 PM (EST/EDT)	helpdesk	⋯
projnarrative.pdf Original!	Project Narrative	2/2/2021, 04:07:55 PM (EST/EDT)	Robinson-PI	
supportingdocs.pdf	Supporting Documentation	2/2/2021, 04:08:31 PM (EST/EDT)	Robinson-PI	⋯
techabstract.pdf	Technical Abstract	2/2/2021, 04:08:31 PM (EST/EDT)	Robinson-PI	⋯
layabstract.pdf	Lay Abstract	2/2/2021, 04:07:54 PM (EST/EDT)	Robinson-PI	⋯
▶ **Key Personnel (4)**				
▶ **Budget (2)**				
▶ **Performance Sites (1)**				
▶ **Other (0)**				

3 The uploaded file will be displayed in the **Uploaded Files** section at the bottom of the screen. The file that was replaced would have an "Original" label next to it. This file will not have any edit functions available. The new file will have a "Revised" label next to it. The Revised file will have the edit option available until the revised full application deadline.

4 This completes "Replace an existing file with a new file for Iterative Review"

2. Upload new file which was not included in the original application submission

1 If you need to upload a brand-new file which was not included in the original application submission, you can click the "Upload New Files" button.

Full Application Deadline: 10/16/2020, 11:59:59 PM (EST/EDT) **Verification Deadline:** 10/19/2020, 05:01:00 PM (EST/EDT)

Summary	Contacts	Full Application Files	Application and Budget Data	Verify Full Application	Requested Info

Full Application BG200047   **Status: DRAFT**

Application Title: app pkg log number BG200047
Award Mechanism: Basic Research Award
Mechanism Option: Basic Research

Review each category to verify accuracy. New files can be uploaded, and any file can be deleted, replaced, or edit file category. Select the "Validate" button to check that **1** all required files conform to the specifications of the Funding Opportunity/(Program Announcement)

[Validate] [**Upload New Files**]

Uploaded Files

File Name	File Type	Uploaded Date	Uploaded By	Actions
▶ Attachments (7)				
▶ Key Personnel (2)				
▶ Budget (2)				
▶ Performance Sites (1)				
▶ Other (0)				

Summary Contacts **Full Application Files** Application and Budget Data Submit/Request Approval Full Application

Full Application BG210014   Status: **DRAFT**

Application Title: test
Award Mechanism: Basic Research Award
Mechanism Option: No Option

Review each category to verify accuracy. New files can be uploaded, and any file can be deleted, replaced, or edit file category. Select the "Validate" button to check that all required files conform to the specifications of the Funding Opportunity/(Program Announcement) | Validate |

Upload File   ✕

NOTE: For opportunities that require submission of a Key Personnel Form, please upload a completed Key Personnel Form before uploading any other Key Personnel Documents.

Select Files (Maximum 6 files at a time)

ProjectNarrative.pdf (85KB)

✓ | Project Narrative ▼ | ②   ✕

Allowed File format: PDF - Required

⬇
Drop Files Here   OR   (Choose Files)

Maximum File Size: 90 MB

| cancel | | upload |

---

② The **Upload File** section will open. Select the file you want to upload either by dragging and dropping or by browsing. Once you select the file, it will appear on the right side of the panel. Choose the file type for the selected file from the "File Type" drop down and click "upload". When the upload is complete you will see a message on screen that the upload was successful.

Full Application BG200047   **Status: DRAFT**

Application Title: app pkg log number BG200047
Award Mechanism: Basic Research Award
Mechanism Option: Basic Research

Review each category to verify accuracy. New files can be uploaded, and any file can be deleted, replaced, or edit file category. Select the "Validate" button to check that all required files conform to the specifications of the Funding Opportunity/(Program Announcement)

<div align="right">

[Validate] **Upload New Files**

</div>

Uploaded Files

File Name	File Type	Uploaded Date	Uploaded By	Actions
▸ Attachments (6)				
▸ Key Personnel (2)				
▾ Budget (2)				
BudgetNormal.pdf	Budget	10/15/2020, 12:59:35 PM (EST/EDT)	Robinson-PI	(•••)
BudgetJustification.pdf	Budget Justification	10/15/2020, 12:59:32 PM (EST/EDT)	Robinson-PI	(•••)
▸ Performance Sites (1)				
▸ Other (0)				

3 You can view your uploaded files in the **Uploaded Files** Section at the bottom of the screen.

4 The files will be listed under the corresponding file group. Each file group name will have a counter indicating the number of files underneath that file group. To view the files under each file group, you can click and expand each section.

5 This completes "Upload new file which was not included in the original application submission".

3. Move an existing file from one File Type/ File group to another

Uploaded Files

File Name	File Type	Uploaded Date	Uploaded By	Actions
▾ Attachments (5)				
projnarrative.pdf	Project Narrative	2/2/2021, 04:07:55 PM (EST/EDT)	Robinson-PI	•••
supportingdocs.pdf	Supporting Documentation	2/2/2021, 04:08:31 PM (EST/EDT)	Robinson-PI	•••
techabstract.pdf	Technical Abstract	2/2/2021, 04:08:31 PM (EST/EDT)	Robinson-PI	•••
layabstract.pdf	Lay Abstract	2/2/2021, 04:07:54 PM (EST/EDT)	Robinson-PI	•••
sow.pdf	Statement of Work	2/2/2021, 04:07:55 PM (EST/EDT)	Robinson-PI	Replace File ① Edit File Info
▸ Key Personnel (4)				
▸ Budget (2)				
▸ Performance Sites (1)				
▸ Other (0)				

Validate   **Upload New Files**

layabstract.pdf	Lay Abstract ▾	2/2/2021, 04:07:54 PM (EST/EDT)	Robinson-PI	💾 ✕

① If you need to move a file from one file group to another, click on the actions icon ••• next to the file you want to move and click on "Edit File".

② The File Type dropdown will become editable. Select the correct File Type/File Group and click the save button. The file will get moved to the correct File Type or File Group.

③ This completes "Move an existing file from one File Type/ File group to another".

4. Adding a Key Person using a Key Personnel Form

Full Application BG200077   Status: **DRAFT**

Application Title: Basic Research Award-CSL for Iterative Review
Award Mechanism: Basic Research Award
Mechanism Option: Basic Research

Review each category to verify accuracy. New files can be uploaded, and any file can be deleted, replaced, or edit file category. Select the "Validate" button to check that all required files conform to the specifications of the Funding Opportunity/(Program Announcement)   [Validate]

Upload File   ✕

Select Files (Maximum 6 files at a time)

NOTE: For opportunities that require submission of a Key Personnel Form, please upload a completed Key Personnel Form before uploading any other Key Personnel Documents.

Key Personnel Form_Smith L.pdf (42KB)

✓   Attachments ▸   ✕

Key Personnel ▾

⬇   OR   (Choose Files) | Key Personnel Form | ①

Drop Files Here   Key Person Biographical Sketch

                                      Key Person Current & Pending Support

                                      Key Personnel - PI ▸   [cancel] [upload]

Maximum File Size: 90 MB   Budget ▸

① If you want to add a new key person, click "Upload New Files". Next, select a file. Click the file type drop-down for the selected file and select "Key Personnel Form" from the "Key Personnel" file group and click "upload". The system will parse the form and will create a new Key Person entry. The new key person will appear in the **Uploaded Files** section in the bottom of the screen.

② This completes "Adding a Key Person using a Key Personnel Form".

5. Adding a Key Person manually

Full Application Deadline: 2/2/2021, 04:15:59 PM (EST/EDT) **Verification Deadline:** 2/2/2021, 04:16:00 PM (EST/EDT)

| Summary | Contacts | Full Application Files | Application and Budget Data | Verify Full Application | Requested Info |

Full Application BG200077   **Status: DRAFT**

Application Title:	Basic Research Award-CSL for Iterative Review
Award Mechanism:	Basic Research Award
Mechanism Option:	Basic Research

Review each category to verify accuracy. New files can be uploaded, and any file can be deleted, replaced, or edit file category. Select the "Validate" button to check that all required files conform to the specifications of the Funding Opportunity/(Program Announcement)

[Validate]

Upload File   ✕

NOTE: For opportunities that require submission of a Key Personnel Form, please upload a completed Key Personnel Form before uploading any other Key Personnel Documents.

Select Files (Maximum 6 files at a time)

Key Person Form Smith L.ppt (338KB)

①

✓ Key Person Biographical ... ▼ | Enter Key Personnel Name ✕ | ❓   ✕

5 page limit - Allowed File format: PD

Keys, Johnny

Tang, Marielle

Edmonson II, Paul

⬇
Drop Files Here   OR   (Choose Files)

One or more files require a Key Personnel Name

Maximum File Size: 90 MB

[cancel]   [upload]

---

① If you do not have a Key Personnel Form and would like to upload files for a new key person, click the "Upload New Files" Button and then select a file . Click the file type drop drown and select any key personnel file type other than "Key Personnel Form" (e.g., biographical sketch). A new field will appear. In this field you can select an existing key person or type in the new key person's name and click "Upload". The system will create the new key person. The new key person will appear in the Uploaded Files section in the bottom of the screen.

② This completes "Adding a Key Person manually".