

## BUSINESS PROCESS: Internal Form

**Overview or Process Summary:** Prior to submitting a proposal, Principal Investigators must route the proposal for signatory approval by their Chair, Dean/Director, and Sponsored Research.

The Internal Form, is the mechanism to officially establish approval to seek funding. This fully signed form is required prior to submission of a proposal to a sponsor and prior to the establishment of the project within Sponsored Research.

### Business Process

- Faculty and/or administrative staff access the [Internal Form](#) developed by Sponsored Research.

Internal Form Help  
Print Preview

**Welcome to the Internal Form**

**Internal Form Begin**

**1. Project Information**

**2. Project Investigators**  
-Add Add. Investigator  
-Add Senior Staff  
-Add Point of Contact

**3. Sponsor & Federal Awards**

**4. Commitment**

**5. Project Budget**

**6. F&A and Cost-Sharing**  
-Add F&A Information  
-Edit F&A Information  
-Delete F&A Information

**7. Compliance Approvals**

**8. Conflicts of Interest**

**9. File Attachments**

**10. Investigator Agreement**

**Exit Internal Form**

**INSTRUCTIONS**

**Step 1 - Fill out Form**

1. The Internal Form contains 9 sections which can be viewed in the Form Sections Menu on the left side of the page.
2. Go through each section and fill out the necessary fields. All required fields are highlighted in yellow.
3. To save a section and continue, hit the SAVE AND CONTINUE button at the bottom of that section. This will save all information on that page.
4. To navigate through sections without saving, you may click the sections link in the Internal Form Menu.

**Step 2 - Submit Form**

1. To have reviewers sign or look over your form, please enter your electronic PIN that was assigned to you upon registering for the Research.Online system.
2. After you submit the form for their review, the appropriate reviewers will be contacted about your submission by email and requested to sign in to view the form in its electronic format. These reviewers include any co-Principal Investigators that you have listed in your Internal Form, department chairperson, and dean or associate dean of the college taking credit for the proposal.
3. Reviewers will either accept or reject your Internal Form. You will be able to check the status of your Internal Form via the "Pending Approval" link in your User Console.
4. You may "unlock" your Internal Form underneath the "Pending Approval" screen if you choose to make further edits to your form. This action will generate an email which will be sent out to the previously stated reviewers to inform them that you have temporarily or permanently removed your form from their review queue. This also resets their signature status to pending and requires them to re-review your form.
5. Note: The form will be automatically submitted to your Senior Research Administrator after the necessary signatures have been received.

[Continue to Step 1](#)

- You will need to [register](#) prior to using the Internal Form. To register, you will need to enter your College, Department, Name, GEMS ID (Employee ID) with leading zeroes, and Contact Information. You will also need to know your affiliation or user level: Undergraduate, Graduate, Faculty, Staff, CRAN or other. If you are a Department Research Administrator who will be starting or reviewing Internal Forms for faculty, check the box labeled "College Research Admin Network Access", also known as CRAN. Chairs, Deans and/or delegates check the box labeled "Administrator's Access."

Otherwise the boxes should be left blank. Select a Username and Password then click “Register.” Your PIN number will be emailed to you.

**Log In to the *USF Internal Form***

Username:  
 [Forgot Username?](#)

Password:  
 [Forgot Password?](#)

☐ Remember Me

If you have not yet registered for the USF Internal Form system, please [click here to register](#).

If you are having trouble logging in, and you cannot retrieve your password with the links in the login box above, please [send us a service request](#).

- To input a new Internal Form, faculty and/or administrative staff should select the option of “New Internal Form.”

**College Admin Console of Janet Reyes** [Menu](#) | [Log Out](#)

Welcome to the web-based Internal Form. If you should encounter any difficulties, please [click here to submit a Service Request](#). Be sure to choose “Electronic Internal Form” as your subject/category.

**Internal Forms**

- New Internal Form**
- Incomplete Existing Forms
- Complete & Pending Approval Forms
- Most Recent Forms

Unlock a Form

[Search FCOI Subrecipient Disclosures.](#)  
[Department Faculty List](#)  
[Edit Authorized Signatories](#)

**User Information**

- [Update User Profile](#)
- [Change Password or Secret Question](#)
- [Retrieve PIN](#)

**Session Information**

- The Instructions page provides basic information on how to fill out and submit the form. To begin, click “Continue to Page 1.”

Internal Form Help Print Preview	<b>Welcome to the Internal Form</b>	
<b>Internal Form Begin</b>	<b>INSTRUCTIONS</b>	
<b>1. Project Information</b>	<b>Step 1 - Fill out Form</b>	
<b>2. Project Investigators</b> -Add Add. Investigator -Add Senior Staff -Add Point of Contact	<ol style="list-style-type: none"> <li>1. The Internal Form contains 9 sections which can be viewed in the Form Sections Menu on the left side of the page.</li> <li>2. Go through each section and fill out the necessary fields. All required fields are highlighted in yellow.</li> <li>3. To save a section and continue, hit the SAVE AND CONTINUE button at the bottom of that section. This will save all information on that page.</li> <li>4. To navigate through sections without saving, you may click the sections link in the Internal Form Menu.</li> </ol>	
<b>3. Sponsor &amp; Federal Awards</b>	<b>Step 2 - Submit Form</b>	
<b>4. Commitment</b>	<ol style="list-style-type: none"> <li>1. To have reviewers sign or look over your form, please enter your electronic PIN that was assigned to you upon registering for the <i>Research.Online</i> system.</li> <li>2. After you submit the form for their review, the appropriate reviewers will be contacted about your submission by email and requested to sign in to view the form in its electronic format. These reviewers include any co-Principal Investigators that you have listed in your Internal Form, department chairperson, and dean or associate dean of the college taking credit for the proposal.</li> <li>3. Reviewers will either accept or reject your Internal Form. You will be able to check the status of your Internal Form via the "Pending Approval" link in your User Console.</li> <li>4. You may "unlock" your Internal Form underneath the "Pending Approval" screen if you choose to make further edits to your form. This action will generate an email which will be sent out to the previously stated reviewers to inform them that you have temporarily or permanently removed your form from their review queue. This also resets their signature status to pending and requires them to re-review your form.</li> <li>5. Note: The form will be automatically submitted to your Senior Research Administrator after the necessary signatures have been received.</li> </ol>	
<b>5. Project Budget</b>	<a href="#">Continue to Step 1</a>	
<b>6. F&amp;A and Cost-Sharing</b> -Add F&A Information -Edit F&A Information -Delete F&A Information		
<b>7. Compliance Approvals</b>		
<b>8. Conflicts of Interest</b>		
<b>9. File Attachments</b>		
<b>10. Investigator Agreement</b>		
<b>Exit Internal Form</b>		

- Any section highlighted in yellow on the internal form is a required field
- Enter Project Information:
  - Select the purpose of the Internal Form.

Provide the FAST Project ID (Account Number), if continuation; Sponsor Deadline Date (if applicable), and Previous Proposal number (if any) in the boxes

indicated.

## Step 1. Project Information

### PURPOSE

<input type="checkbox"/> Pre-proposal	<input type="checkbox"/> Competitive Renewal
<input type="checkbox"/> New Proposal	<input type="checkbox"/> Subproject
<input type="checkbox"/> Contract Industry Sponsored/Pharmaceutical	<input type="checkbox"/> Internal Award
<input type="checkbox"/> Contract (Non-Pharmaceutical)	<input type="checkbox"/> Resubmission
<input type="checkbox"/> Supplemental Request	<input type="checkbox"/> Data Change:
<input type="checkbox"/> Continuation	-- Please Select from below --

Project ID, if continuation/competitive renewal:	Sponsor's Submission Deadline Date:	Previous Proposal Number, if any:
<input type="text"/>	<input type="text"/>	<input type="text"/>

- Indicate whether or not the proposal is in response to American Recovery and Reinvestment Act (ARRA) funding announcement or a Limited Submission.

<input type="checkbox"/> ARRA/Recovery Act Funding	<input type="checkbox"/> <a href="#">Limited Submission</a>
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- Enter the Project Title (must match title used to obtain IRB approval, if applicable); Keywords that best describe the project; and a layman's description of the project.

### PROJECT TITLE / KEYWORDS / DESCRIPTION

PROJECT TITLE:  
(For projects requiring IRB approval, the Project Title entered here must be the same as what appears on your IRB or IACUC application)

Center for the Study of Research Administration

PROJECT KEYWORDS: (Please provide a keyword(s) that best describes your research project.)

Research Administration, cognitive and neurologic differences

LAYMAN'S DESCRIPTION: (1000 Characters Maximum)

Research Administration is an unusual career choice and mostly unknown to the general population. Research Administrators often must navigate the ever-changing world of sponsor guidelines and policies and do not always have a good support network on which to rely. For these reasons, we propose to create the Center for the Study of

- Enter the Project Type: Research, Training, or Other. If Other, please specify.

**PROJECT TYPE**

☐ Research
 ☐ [Instruction](#) (Training)
 ☒ [Other Sponsored Activity](#) (OSA)
 If OSA, specify

- If this research was given a Department of Defense research classification, enter the type given: Classified, Unclassified, Unclassified Sensitive, or Not Applicable.

**CLASSIFIED RESEARCH**

(Was this project given a Department of Defense security classification? If yes, indicate level.)

☐ Classified
 ☐ Unclassified
 ☐ Unclassified Sensitive
 ☒ Not Applicable

- Export Control - Indicate whether [Export Control](#) could impact this project. To determine if this applies, ask whether or not the project has an international component through foreign purchases/expenditures, shipping, travel/conferences, subcontracts/consultants, employees/ student/participants, transfer of information or equipment, and/or performance site(s).

**EXPORT CONTROL**

Does the proposed technology involve potential military application or defense technology, software, or other defense articles listed on the United States Munitions List (USML) under the International Traffic in Arms Regulations?

☐ Yes ☒ No

Does the project require travel to foreign countries?

☐ Yes ☒ No

Is any member of the project team a [foreign national](#)?

☐ Yes ☒ No

Does the project involve anything with a strong potential dual-use (civilian, commercial and military) application?

☐ Yes ☒ No

- If this research is community-based, select yes. Otherwise, select no. To determine if a project is community-based, ask whether the project involves partnerships and/or beneficiaries at the local or regional level or if it has immediate or short term possibilities to help solve problems that affect the citizens of this locality or region. If the answer to either is yes, this is a community-based project.

#### COMMUNITY-BASED PROJECT

(Does the project involve partnerships and/or beneficiaries at the local, state, national, or international level? Does the project have immediate or short term possibilities to help solve problems that affect the citizens of that area? If the answer to either is yes, this is a community-based project.)

☐ Yes ☒ No

- [Tampa Bay Educational Partnership \(TBEP\)](#) – Does the project involve partnership with, and/or working in a Hillsborough County Public School?

#### TAMPA BAY EDUCATIONAL PARTNERSHIP (TBEP)

Does the project involve partnerships with, and/or working in a Hillsborough County Public Schools facility? Click [here](#) to learn more about TBEP.

☐ Yes ☐ No

- USF World – International Research/Engagement- Does the project have an Internal Component?

#### USF WORLD - INTERNATIONAL RESEARCH/ENGAGEMENT

Does the project have an international component? International components may include, but are not limited to:

- Funding from foreign institutions or in non-US currencies
- Research with foreign partners or research in foreign countries/oceans/seas
- Traveling to international destinations (USF faculty, staff, and/or students)
- Hiring of foreign nationals
- Opening of foreign bank accounts, purchasing equipment, leasing or renting vehicles in foreign countries, etc.

☐ Yes ☒ No

By checking this box, the international component of your research will be recognized and added to the USF UCosmic® database. Click [here](#) to learn more about UCosmic®.

- Click “Save and Continue”

Save and Continue

- Enter Project Investigators (CRAN Level only – this is auto-populated for PIs)
  - Add the Principal Investigator by clicking “ADD PI.”

#### PRINCIPAL INVESTIGATOR

ADD PI

- The PI can be added by GEMS ID (Employee ID) or his or her USF email address. Click “Add PI.”

**ADD A PI TO INTERNAL FORM**

The PI must first be registered in the Internal Form system before they can be added to the form.

You may add the PI by GEMSID or by email address.

GEMS ID for PI:

OR

Email for PI:

- Review and click “Confirm.”

**ADD PI TO INTERNAL FORM**

<b>PI NAME:</b> Janet Reyes	<b>PI GEMS ID:</b> 0000067324	<b>PI EMAIL ADDRESS:</b> jreyes@fmhi.usf.edu
<b>PI PHONE:</b> 813-974-4670	<b>PI FAX:</b> 813-974-7743	

- If there are Co-PIs, Co-Investigators, or Senior Staff (Key Personnel), select the option under “Project Investigators” located on the column on the left side of the screen.
  - Co-PIs can be added by GEMS ID (Employee ID) or USF email address. Click “Add Co-PI.”

Internal Form Help  
Print Preview

**Internal Form Begin**

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-Add Point of Contact

3. Sponsor & Federal Awards

## 2.a Additional Investigator

**ADD AN ADDITIONAL INVESTIGATOR TO INTERNAL FORM** (Max of 6 individuals)

The investigator must first be registered in the Internal Form system before they can be added to the form.

You may select the investigator by GEMS ID or by email address.

GEMS ID of Add. Investigator:

OR

Email of Add. Investigator:

- Review, select their role, and click “Confirm.”

## 2.a Additional Investigator

ADD AN ADDITIONAL INVESTIGATOR TO INTERNAL FORM (Max of 6 individuals)

NAME:	GEMS ID:	EMAIL ADDRESS:
BJ Fortune	01000046889	rfortune@research.usf.edu
PHONE:	FAX:	ROLE:
813-9744054	-	-- Please Select from below --
		-- Please Select from below --
		Co-Investigator
		Co-Principal Investigator

Confirm

- A confirmation message is displayed.

## 2.a Additional Investigator

You have successfully added an investigator.

Back

- Senior Staff - Professional personnel who are responsible for the scientific or technical direction of project.



## 2.b Senior Staff

### ADD SENIOR STAFF MEMBER (Maximum of 2 individuals.)

First Name:	Last Name:	
<input type="text" value="Elizabeth"/>	<input type="text" value="Foster"/>	
University:	Department:	Position:
<input type="text" value="USF"/>	<input type="text" value="TRAIN"/>	<input type="text" value="Staff"/>
Telephone:	FAX:	
<input type="text" value="813 974-6081"/>	<input type="text"/>	
Email Address:		
<input type="text" value="elizabethf@usf.edu"/>		
<input type="button" value="Add Senior Staff"/>		

- Point of Contact - If there is someone that should be contacted for this grant other than the PI.

## 2.c Point of Contact

### ADD POINT OF CONTACT (USF System department contact/liaison for information related to this project.)

First Name:	Last Name:	
<input type="text" value="Robert"/>	<input type="text" value="Fortune"/>	
Telephone:	Fax:	Email Address:
<input type="text" value="813-974-1949"/>	<input type="text" value="813-974-4962"/>	<input type="text" value="rfortune@usf.edu"/>
<input type="button" value="Add Contact"/>		

- Once you have entered any Co-PIs or other Key Personnel, click on Project Investigators to continue. The screen will display the PI with any other key personnel below. Confirm and click "Save and Continue."  
**Note:** Co-PIs must also be registered to access and sign the Internal Form.

## Step 2. Project Investigators

### PRINCIPAL INVESTIGATOR

[EDIT](#)

PI Name: **Janet Reyes** GEMS ID: **0000067324**  
PI Telephone: **813-974-4670** PI FAX: **813-974-7743**  
PI Email Address: **jreyes@fmhi.usf.edu**  
College: **Behavioral and Community Sciences** PI Mail Point: **MHC 2306**  
Home department of the Principal Investigator: **Child and Family Studies 4**

### 1) CO-PRINCIPAL INVESTIGATOR

[DELETE](#)

Name: **BJ Fortune** Phone: **813-9744054** FAX: **-** Email Address: **rfortune@research.usf.edu**

### 1) SENIOR STAFF

[EDIT](#)[DELETE](#)

Staff Name: **Elizabeth Foster** Staff Phone: **813 974-6081** Staff FAX: Staff Email Address: **elizabethf@usf.edu**

### 1) POINT OF CONTACT

[EDIT](#)[DELETE](#)

Contact Name: **Robert Fortune** Contact Phone: **813-974-1949** Contact FAX: **813-974-4962** Contact Email Address: **rfortune@usf.edu**

[Previous](#)[Save and Continue](#)

- Sponsor and Federal Awards
  - Sponsor - Enter the following Sponsor information: Name, Program (RFP #, RFA #, or PA#, none, etc.), Sponsor Contact name, Sponsor Title (contact's title), Address, City, State, Zip, Phone, Fax, and Email.

### Step 3. Sponsor and Federal Awards

#### SPONSOR

Sponsor Name	Federal Sponsor		
Sponsor Program (i.e. Name, RFP, RFA, OR PA#):	01234567		
Sponsor Contact:	Pat Smith		
Sponsor Title:	Grants Management Specialist		
Address:	9000 Rockville Pike		
City:	Bethesda	State:	MD
		Zip:	20832
Phone:	555-555-1212	Fax:	
E-Mail:	psmith@fawmcs.gov		

- Select the Funding Source: Federal, State, Local FL Govt, For Profit Corp, Non-Profit Org, or Other

Funding Source: ☒ Federal ☐ State ☐ Local FL Govt ☐ For-Profit Corp ☐ Nonprofit Org ☐ Other

- Federal Flow-Through – If the grant money is federal, but is flowing through a non-federal sponsor.

Federal Flow-Through: ☐

- CAS Exceptions for Federal and Federal Flow-Through Projects Only - Indicate whether or not the project has Cost Accounting Standards (CAS) exceptions. If your project is federal or federal flow-through but does not have CAS exceptions, select “No.” If your project is federal or federal flow-through and has CAS exceptions, select “Yes.” To determine if this applies, review your budget for any requests for clerical and administrative staff salaries, postage, local telephone services, office supplies, general purpose software/computers/equipment, subscriptions, and/or memberships. If any of those items are requested in the budget, you should select CAS Exception, “Yes” and ***you must include special justification in the budget narrative in order to comply with federal cost accounting standards (Uniform Guidance).*** If your project is not federal or fed flow-through, select “No.” Click “Save and Continue.”

### CAS EXCEPTIONS FOR FEDERAL AND FEDERAL FLOW-THROUGH AWARDS ONLY

Budget request includes salary for clerical and administrative staff, postage, local telephone service, office supplies, general purpose software, subscriptions, and/or memberships. If **yes**, you must include special justification **in the budget narrative** in order to comply with **federal cost accounting standards (OMB Circular A-21)**.

☐ Yes ☒ No

- Commitment

- Seed Grants - Indicate whether or not the PI has received any seed funds. To determine if this applies, you should consider if you have received an internal grant award from the Office of Research & Innovation, the USF Collaborative, or another USF unit that has substantially contributed to your capacity to write this proposal. If seed funding was received, check “Yes” and indicate the award you received and when. Otherwise, check “No.”

### SEED GRANTS

(Have you received an internal grant award from Sponsored Research, the Office of Community Engagement, or another USF unit that has substantially contributed to your capacity to write this proposal?)

Have you received any form of internal funding?

☐ Yes ☒ No

If yes, which?

and when?

- USF System Requested Resources – Will the project involve students where there is a tuition impact and/or space issue.

### USF SYSTEM REQUESTED RESOURCES

Will Graduate Assistants be appointed to this project?

☒ Yes ☐ No

If yes, do the sponsor guidelines allow tuition to be charged for graduate assistants?

☒ Yes ☐ No

If yes, the [USF Research & Innovation Tuition Payment Guidelines](#) state that tuition should be requested to be paid by the sponsor. If for any reason, tuition is allowed to be charged to the sponsor, but instead USF System funded tuition waivers are requested, **JUSTIFICATION IS REQUIRED**. Please attach the required justification and indicate the number of USF System funded tuition waivers (**in hours**) requested for each year of funding:

1st Year	2nd Year	3rd Year	4th Year	5th Year
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If the sponsor guidelines **DO NOT** allow tuition to be charged for graduate assistants, how many USF System funded tuition waivers (**in hours**) will be requested for each year of funding?

1st Year	2nd Year	3rd Year	4th Year	5th Year
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Indicate if this project requires additional space or facilities. If yes, please provide a description. Click “Save and Continue.”

#### SPACE & FACILITY

Additional Space and/or Facility Recommendations for this Project?

☐ Yes ☒ No

If yes, please describe:

- Indicate If your project will use space in either USF Health Byrd Alzheimer's Institute or CAMLS.

Will any portion of the proposed take place in the USF Health Byrd Alzheimer's Institute?

☐ Yes ☒ No

Will any portion of the proposed take place in CAMLS?

☐ Yes ☒ No

- Research Computing- Will the project be using USF IT's [Research Computing High Performance Computing](#) department?

#### RESEARCH COMPUTING

Will the project require use of high performance computing (HPC), visualization, large (> 10 Terabytes) of storage or other advance computing resources?

☐ Yes ☒ No

- Indicate if the budget calls for [extra compensation](#) or overload. If any USF faculty or staff will be employed in excess of the full-time equivalent (FTE) established for the employee's regular or primary, non-OPS position or will be appointed to a non-OPS position and OPS at the same time you will need to check “Yes” for this field and complete the [Request for Approval of Extra Compensation](#) form. If not, check “No.”

#### EXTRA COMPENSATION

Will any personnel be paid Extra Compensation from this project?

☐ Yes ☒ No

- Indicate if this project will involve subcontracts.

#### SUBCONTRACTS

Will this project generate subcontracts?

☐ Yes ☒ No

- Project Budget

- Year One Budget Period - Enter the budget information for the Initial Budget Period including the start and end dates of the initial budget period, the direct costs (rounded to the nearest dollar), the modified total direct cost (MTDC) or the total direct costs (TDC), and the Indirect Cost (F&A) Rate. To determine what amount to use for MTDC or TDC, please refer to the Facilities and Administrative Cost Rates under "Base." The green "View Rates" button provides a link to a chart with the indirect cost rates.

YEAR ONE BUDGET PERIOD (Please round direct costs to the nearest dollar)			
FROM: (mm/dd/yyyy)	01/01/2013	TO: (mm/dd/yyyy)	12/31/2013
DIRECT COSTS: \$	10000	MTDC or TDC: \$ (INDIRECT COSTS BASE to which F&A rate is applied)	10000
INDIRECT COSTS RATE: (Facilities & Administrative Costs, "F&A" Rate)	34.5 %	<a href="#">View Rates</a>	
INDIRECT COSTS: \$	3450	TOTAL COSTS: \$	13450

- Project Period - Enter the budget information for the Project Period including the start and end dates of the entire project period, the direct costs (rounded to the nearest dollar), the MTDC or TDC, and the Indirect Cost Rate. If no indirect costs are allowed, enter a zero in the indirect cost box.

PROJECT PERIOD (Includes Year One. Please round direct costs to the nearest dollar)			
FROM: (mm/dd/yyyy)	01/01/2013	TO: (mm/dd/yyyy)	12/31/2015
DIRECT COSTS: \$	20000	MTDC or TDC: \$ (INDIRECT COSTS BASE to which F&A rate is applied)	20000
INDIRECT COSTS RATE: (Facilities & Administrative Costs, "F&A" Rate)	34.5 %	<a href="#">View Rates</a>	
INDIRECT COSTS: \$	6900	TOTAL COSTS: \$	26900

- Once all fields have been completed, click the "Calculate Costs" button. the indirect cost and total cost should match the proposal budget.

YEAR ONE BUDGET PERIOD (Please round direct costs to the nearest dollar)			
FROM: (mm/dd/yyyy)	01/01/2013	TO: (mm/dd/yyyy)	12/31/2013
DIRECT COSTS: \$	10000	MTDC or TDC: \$ (INDIRECT COSTS BASE to which F&A rate is applied)	10000
INDIRECT COSTS RATE: (Facilities & Administrative Costs, "F&A" Rate)	34.5 %	<a href="#">View Rates</a>	
INDIRECT COSTS: \$	3450	TOTAL COSTS: \$	13450

  

PROJECT PERIOD (Includes Year One. Please round direct costs to the nearest dollar)			
FROM: (mm/dd/yyyy)	01/01/2013	TO: (mm/dd/yyyy)	12/31/2015
DIRECT COSTS: \$	20000	MTDC or TDC: \$ (INDIRECT COSTS BASE to which F&A rate is applied)	20000
INDIRECT COSTS RATE: (Facilities & Administrative Costs, "F&A" Rate)	34.5 %	<a href="#">View Rates</a>	
INDIRECT COSTS: \$	6900	TOTAL COSTS: \$	26900

  

[Calculate Costs](#)

- Indicate whether or not full indirect costs are being requested. To determine the full indirect cost rate for the project type and funding source, refer to the Facilities and Administrative Cost Rates. If full indirect costs are not requested, indicate why. Click "Save and Continue."

Does this project budget include a USF Negotiated Indirect Cost (F&A) rate?

☒ Yes ☐ No

If using a [USF Negotiated F&A Rate](#), please indicate category:

Other Sponsored Activities (On-Campus) - 34.5%

If NOT using a [USF Negotiated F&A Rate](#), please state reason:

- Distribution of F&A and USF Cost-Sharing

- Distribution of Facilities and Administration ( F&A ) - If the PI's department/college is to receive all F&A, do **NOT** complete this section. If this project involves the distribution of F&A, click "Add F&A Information" in the beige column on the left side of the screen. For each split in F&A, identify the College or Area, the percentage to be allocated to that area, the PI/Co-PI this distribution applies to, and the Chair's name.  
**Note:** Only complete this section if F&A is to be shared/split with another department/college.

Internal Form Begin	ADD F & A INFORMATION		
1. Project Information	COLLEGE/AREA	%	PI / Co-PI
2. Project Investigators -Add Add. Investigator -Add Senior Staff -Add Point of Contact	Office of Research & Innovation (USF-Tampa)	50	BJ Fortune
3. Sponsor & Federal Awards	CHAIRPERSON/SUPERVISOR		
4. Commitment	Keith Anderson		
5. Project Budget	<input type="button" value="Add F&amp;A"/> <input type="button" value="Finish"/>		
6. F&A and Cost-Sharing -Add F&A Information -Edit F&A Information -Delete F&A Information			

- Once all fields have been completed for the first distribution, click the “Add F&A” button. Repeat the steps for each distribution. Once all distributions have been added, click “Finish.” The F&A distribution is reflected.

DISTRIBUTION OF FACILITIES AND ADMINISTRATION (F&A)			
COLLEGE/DEPARTMENT	%	PI / Co-PI	CHAIRPERSON/SUPERVISOR
Behavioral and Community Sciences (USF-Tampa)	50	Janet Reyes	
Office of Research & Innovation (USF-Tampa)	50	BJ Fortune	Keith Anderson

- USF Cost-Sharing / In-Kind / Match – If no, check the appropriate box and enter a zero in both the required and voluntary boxes then click “Calculate Totals.” All information should be populated with zeroes.
- If the project includes [cost sharing](#), check the “yes” box and indicate what percentage of required and/or voluntary cost share USF is contributing.
- If cost sharing is required, input the required percentage in the appropriate field and enter a zero under voluntary. Place the associated cost share dollars in the appropriate categories: Salary, Operating Capital Outlay (OCO), Expenses, F&A costs. Be sure to place the dollars under the area that will be providing the cost share: the Department, College/Area, DSR and/or 3<sup>rd</sup> Party.  
**Note:** For 3<sup>rd</sup> Party, attach written verification from contributor.
- If voluntary, input the percentage in the appropriate field and enter a zero under required. Place the associated cost share dollars in the appropriate categories: Salary, OCO, Expenses, F&A costs. Be sure to place the dollars under the area that will be providing the cost share: the Department, College/Area, DSR and/or 3<sup>rd</sup> Party.  
**Note:** For 3<sup>rd</sup> Party, attach written verification from contributor.



- Click “Calculate Totals” to populate the totals fields and verify them against the budget. Then click “Save and Continue.”

USF COST-SHARING / IN-KIND / MATCH						
COST-SHARING?						
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			Required: <input type="text" value="0"/> %		or Voluntary: <input type="text" value="0"/> %	
PROJECT COMMITMENT	DEPARTMENT	COLLEGE	DSR	OTHER USF ENTITY	NON-USF 3RD PARTY	TOTAL
Salary & Fringe Benefits	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0
Equipment and Other Capital Expenditures ( <a href="#">Over \$5,000 per piece of equipment</a> )	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0
Expense	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0
F&A Costs	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0
TOTAL	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

Calculate

- Compliance Approvals (***attach copies of compliance approval letters***)
  - Only the PI can fill out this section.**
  - Indicate if this project involves:
    - Biohazards (Toxins, Infectious Agents, Recombinant DNA), the Status (approved, closed, exempt, pending), the Approval Date, and Number.

BIOHAZARDS		
Are BIOHAZARDS used in this project?		
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<div> <input type="checkbox"/> Toxins           <input type="checkbox"/> Infectious Agents (Select/Restricted Agents)           <input type="checkbox"/> Recombinant DNA         </div>		
Status:	Approval Date:	Number:
<input type="text" value="-- Please Select from below --"/>	<input type="text"/>	<input type="text"/>

- Radioactive Materials, the Status (approved, closed, exempt, pending), the Approval Date and Number.

### RADIOACTIVE MATERIALS

Are RADIOACTIVE MATERIALS used?

☐ Yes ☒ No

Status:

-- Please Select from below --

Approval Date:

Number:

- Diving Safety

### DIVING SAFETY

Will SCIENTIFIC DIVING be utilized in the project?

☐ Yes ☒ No

- USF Boating

### USF BOATING

Will a vessel be utilized in this project?

☐ Yes ☒ No

Is the operator Motorboat Operator Certification Course (MOCC) certified?

☐ Yes ☒ No

- Human Subjects (Exempt, Expedited, Full, Outside IRB), the Status (approved, closed, exempt, pending), the Approval Date, and Number.

### HUMAN SUBJECTS

Does your study involve [HUMAN SUBJECTS](#)?

☒ Yes ☐ No

☐ Exempt

☒ Expedited

☐ Full

☐ Outside IRB

Status:

Pending

Approval Date:

Number:

- Laboratory Animals, the Status (approved, closed, exempt, pending), the Approval Date, and IACUC number. Also indicate whether or not animal data will be used to support a FDA submission.

#### LABORATORY ANIMALS

Are ANIMALS or ANIMAL TISSUES used in this project?

☐ Yes ☒ No

Status:

-- Please Select from below --

Approval Date:

IACUC Number:

- Conflicts of Interests, Outside Activity, and Nepotism
  - **Only the PI can fill out this section.**
  - Do any Investigators (or their Immediate Family) have a Reportable Financial Interest or Relationship on this USF System Research Project? To learn who may qualify as an Investigator, an Immediate Family member, or what constitutes a Reportable Financial Interest or Relationship, please refer to the [USF System Policy 0-309](#) definition of "Investigator", "Immediate Family", or "Reportable Financial Interest or Relationship".

If yes, please disclose the Reportable Financial Interest or Relationship through the eCOI online disclosure system via Applications for Research Compliance (ARC): <https://arc.research.usf.edu/Prod>.

#### CONFLICT OF INTEREST DISCLOSURE

Do any **Investigators** (or their **Immediate Family**) have a **Reportable Financial Interest or Relationship** on this USF System Research Project? To learn who may qualify as an Investigator, an Immediate Family member, or what constitutes a Reportable Financial Interest or Relationship, please refer to the [USF System Policy 0-309](#) definition of "Investigator", "Immediate Family", or "Reportable Financial Interest or Relationship".

☐ Yes ☒ No

If yes, please disclose the Reportable Financial Interest or Relationship through the eCOI online disclosure system via Applications for Research Compliance (ARC): <https://arc.research.usf.edu/Prod>.

- Outside Activity - Indicate if there is an outside activity that is or could be perceived as conflicting with this proposed project. If yes, an [Outside Activity Form](#) must be attached in the File Attachments section (see below).

#### OUTSIDE ACTIVITY

Do you have an **outside activity** that is or could be perceived as conflicting with this proposed project?

☐ Yes ☒ No

If yes, please attach a copy of the [Outside Activities Form](#).

- Do any **Investigators** intend to employ a **Related Person** on this USF System Research Project? To learn who may qualify as an Investigator or Related Person, please refer to the [USF System Policy 0-309](#) definition of "Investigator" or "Related Persons".

If yes, please disclose the proposed employment of a Related Person through the eCOI online disclosure system via Applications for Research Compliance (ARC): <https://arc.research.usf.edu/Prod>

#### NEPOTISM DISCLOSURE

Do any **Investigators** intend to employ a **Related Person** on this USF System Research Project? To learn who may qualify as an Investigator or Related Person, please refer to the [USF System Policy 0-309](#) definition of "Investigator" or "Related Persons"..

☐ Yes ☒ No

If yes, please disclose the proposed employment of a Related Person through the eCOI online disclosure system via Applications for Research Compliance (ARC): <https://arc.research.usf.edu/Prod>

#### • File Attachments

- Attach all appropriate files keeping in mind that attachments are not required by the system in order to submit the form but may be required by the department and/or college. Suggestions for items to attach are: budget, budget justification, backup for less than full indirect cost rates, approval of any cost share commitments, abstract, and compliance approval letters. This is also where forms, such as Financial Disclosure Forms, Outside Activity Forms and Nepotism Memorandums should be uploaded. After uploading, click "Save and Continue."  
**Note:** Do **NOT** attach proposal applications or SF424s.  
**Note:** The Internal Form may be modified at any time prior to the PI signature. Once signed, the form is locked and can only be unlocked by the PI or CRAN user.  
**Note:** There is a 4mb file size limit.

## Step 9. File Attachments

### INSTRUCTIONS

#### General Information

1. Attachments are **not required by the system** in order to submit an Internal Form.
2. Some colleges, campuses and units request supporting documentation (i.e. budget, abstract, project description, etc.) in addition to the internal form for their review and approval. Please check with your authorized signatories for their specific requirements.
3. Attached files can be reviewed by the PI, Co-PI, and authorized signatories during the signature phase.
4. All file formats are accepted (e.g., PDF, Microsoft Word or Excel, Grants.gov application packages, etc.)
5. Multiple files may be included.
6. Any size file is accepted, but **very large files could take several minutes to upload**.

#### Uploading Files

1. To attach a file, click the Attach Files button. A new file attachment popup window will appear.
2. Use the browse button to locate the file on your computer. Then click Open.
3. Next, use the Attach button to upload the file and attach it to your Internal Form.
4. Click the View Previous Attachments link to view any attachments that you have uploaded.
5. When viewing attachments, click the delete link next to any file to delete it from your form.
6. When finished, close the file attachment popup window or click the Close Window link. You can then go to the next page and sign the Investigator Agreement if you are completely finished with your Internal Form.

Attach Files

- Investigator Agreement
  - The PI should read the Investigator's Statement, enter his or her PIN and click "Agree."

## Step 10. Investigator Agreement

### INVESTIGATOR'S STATEMENT

My signature below certifies that:

1. I am not delinquent on any federal debt;
2. I am not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any federal department or agency;
3. I have not and will not lobby any federal agency on behalf of this award;
4. I am aware and agree to abide by the USF System Drug Free Workplace policy;
5. I am familiar with and will adhere to all USF System policies governing USF System Research Projects, including but not limited to policies governing human and animal research, conflicts of interest, nepotism, misconduct in research, and patents and technology transfer;
6. I agree to be bound by the terms and conditions of the grant or contract that supports this proposed activity and, in consideration of the information and facilities made available to me by the USF System or the sponsor, to assign copyright and patent rights to the USF System in accordance with the terms and conditions of my employment contract.

Please enter your PIN and click the agree button to confirm that you have read and agree to the terms stated above.

PIN:

If you cannot recall your PIN, click the **Retrieve PIN** link.

- If the PI did not complete the Internal Form to this stage, the PI should log into the Internal Form system. From the User Console, the PI should select “Incomplete Existing Forms.” The project title should appear in the list. The PI should click on the name of the project and review all information on the form and complete the compliance approvals and conflicts of interests sections prior to approval. If any information is incorrect, the PI should consult with his or her research administrator (or whoever completed the form) and make changes where appropriate. After completing the review, the PI should read the Investigator’s Statement and sign the form by entering his or her PIN and clicking “Agree.”
- Once approved by the PI an auto-generated email notification is sent to the Co-PIs (if any) then the Chair and Dean (or delegates).

Subject: Internal Form Online Submission - Robin Jones

Greetings,

An electronic internal form titled: Center for the Study of Research Administration

has been completed by: Robin Jones

You are designated as an authorized signing official (or alternate) on this form. Please sign-in to the Research.Online site to view and electronically sign the form.

The PIN that was emailed to you after user registration for the website will be necessary to sign the online Internal Form so please be certain that you have this information available.

Thank you for your time.

The Division of Research Resources Team

- Checking on the approval status
  - A PI can check on the status of an Internal Form by accessing the Internal Form system and selecting “Complete and Pending Approval” from the User Console. The option will display the level (Co-PI, Chair, Dean) and the status (Pending, Approved, Denied) of each form.
  - If changes are necessary after any signatures have been obtained, the form will need to be unlocked. To do this, the PI or CRAN user should select “Unlock a Completed Form” from the User Console. A “Temporary Withdrawal” email notification that the form has been unlocked will be sent to all who have previously approved the form. Changes can then be made.  
**Note:** The revised form will need to be signed again by all parties.

Subject: Temporary Withdrawal of Online Internal Form - Robin Jones

Greetings,

Robin Jones has withdrawn his/her Internal Form for further modifications.

The title of this internal form is: Center for the Study of Research Administration

You will be notified by email if and when Robin Jones resubmits the Internal Form. At that time, you will again be asked to sign in to the Research.Online system so that you may view and sign the Internal Form. You may expedite the final submission process by registering for the site if you have not done so already.

Thank you for your time.

The Division of Research Resources Team

- Co-PI requests for approval will appear under “Co-Investigator Approval Requests” from the User Console. Co-PIs should review the form, and indicate their intent to participate by electronically signing the agreement.
- Internal Form users may update their user profile, change their password and/or their security question or retrieve their PIN from the User Console.
- CRAN users have additional capabilities/privileges:
  - Department Faculty List displays everyone in the department that has an Internal Form system account, their GEMS ID and Username.
  - Edit Authorized Signatories can be used to modify the Chair and Dean as well as their delegates within the department/college.
  - One cannot be both a CRAN user and a delegate.
- Administrator Access (Chair and/or Dean) have additional capabilities:
  - A PI can be both a faculty user and an Administrator (Chair/Dean/Delegate).
  - Departments can be added, edited or deleted from the Admin User Console.
  - Approval Requests are listed by PI and Title. Checkmarks identify those projects that have less than full F&A, involve cost sharing, and/or a conflict of interest.
  - Chairs, Deans (or Delegates) will not see all of the screens that a PI or CRAN user sees.
  - The Administrator should “Accept” or “Reject” the submission.
    - If it is accepted, click “Accept”, indicate the signing level (PI, Chair, Dean), enter his or her PIN, and click “Submit Decision.”

- If it is rejected, click “Reject”, complete the rejection comments so that the PI is aware why it is rejected, indicate the signing level (PI, Chair, Dean), enter his or her PIN, and click “Submit Decision.” The PI will be notified that the submission was rejected.

## Timelines

The Internal Form should be completed before a proposal is submitted to a sponsor adhering to the [new proposal submission guidelines](#).

## Roles & Responsibilities

- **Responsible Party:** Faculty and/or Research Administrators are responsible for completing the Internal Form. Faculty are responsible for the content listed for their project. The Chair, Dean and/or delegates are responsible for any resources committed by the faculty and for the timely review and approval of forms for their area.
- **Workflow:** The CRAN and/or PI level enters the information into the Internal Form system. Then the Co-PIs (if any) are automatically notified via email that they need to review and approve the form. After any Co-PIs have approved, the Chair and delegates are automatically notified that they need to review and approve the form. Next, the Dean and delegates are notified that they need to review and approve the form. Finally, Sponsored Research is automatically notified once the form is fully signed.
- **Communications:** If the CRAN user starts the form for the PI, he or she needs to let the PI know when the Internal Form is ready for review and signature. After that, the system handles all notifications automatically.

## Tools & Training

- [DSR Website References](#)
- [Preparing Proposals and Negotiating Awards](#)

## Contacts

[Sponsored Research](#)

**Effective Date or Date Last Updated:** August 11, 2016