

## Creating SF424 Application Package

### Some Background Information Prior to Creating SF424 Application Package

The SF424 features of UFIRST are only available when:

- (1) Submission is to a Federal Grant Program and the "Grants.gov via UFIRST SF424" options are selected on the Proposal SmartForm question 7.0, and
- (2) An opportunity with **forms supported by UFIRST** is selected on the Proposal SmartForm page 1.1 Federal Program Information page.

(1)

**7.0**

**\* Is this a Federal Grant?**  
 Yes  No [Clear](#)

**Indicate how the application will be submitted:**  
 Grants.gov via Cayuse  
 Grants.gov via UFIRST SF424  
 Other  
[Clear](#)

(2)

**1.1 Federal Program Information**

**1.0** Enter Opportunity ID or CFDA number below, click Find, then select the opportunity.

\* Opportunity ID (PA or RFA Number):   
 CFDA Number:   
 CompetitionID:  [Find...](#)

Opportunity ID	Opportunity Title	Opening Date	Closing Date	CFDA Number	Competition ID	Instructions
<input checked="" type="radio"/> PA-14-162	Effects of Cannabis Use and Cannabinoids on the Developing Brain (R21)	5/16/2014	5/7/2017		FORMS-C	

If the form set is **NOT supported by UFIRST**, you will receive the error message below. We strongly recommend you contact DSP at this point to discuss submission alternatives.

Could not update the Funding Proposal due to one or more errors:  
 Validation Failed: The selected opportunity contains the following form(s) that are not supported by UFIRST SF424:

- Selected opportunity(s) HUD\_DetailedBudget HUD\_RaceEthnic HUD\_DisclosureUpdateReport . Either change the submission method on Page 1.0 Question 7.0, or use a different opportunity ID.

**1.1 Federal Program Information**

**1.0** Enter Opportunity ID or CFDA number below, click Find, then select the opportunity.

\* Opportunity ID (PA or RFA Number):   
 CFDA Number:  [Find...](#)  
 CompetitionID:

You must enter the opportunity ID or the CFDA number before selecting the "Find" button. After selecting the "Find" button, the system will contact grants.gov to access matching opportunities. This may take time to complete.

For Further Opportunity Information: [Search Grants](#)

## Who Can Create the SF424 Application Package?

If you have edit access by default to a proposal in UFIRST, you will be able to create an SF424 Application Package for that proposal. Once a proposal has been established in UFIRST all personnel who have edit access by default to the proposal will have Create SF424, Update SF424, and edit access to the SF424 Application Package itself. This includes the PI, Primary Unit Contact, Grant Administrators for Submitting Department and their Parent Department/College Grant Administrators, as well as DSP staff. Additional Edit access to the SF424 Application Package can be granted via the Manage Additional Access activity in the Proposal WorkSpace. See side-by-side graphic of Edit and View activities, below.

### Side-by-Side of Edit and View activities

Edit Access	View Access
<b>Draft</b>	<b>Draft</b>
Edit Proposal SmartForm	View Proposal SmartForm
Access Budget Workspaces	Access Budget Workspaces
<b>Create...</b>	<b>Create...</b>
New Agreement	New Agreement
<b>My Activities</b>	<b>My Activities</b>
Submit For Review and Approval	Submit For Review and Approval
Ready For Submission to Sponsor	Ready For Submission to Sponsor
<b>Create SF424</b>	Create Additional Budget
Create Additional Budget	Send Email
Send Email	Add Comment
Add Comment	Add Internal Documents
Add Internal Documents	Request Ad Hoc Review
Request Ad Hoc Review	Request PI Certification
Request PI Certification	Export Budget
<b>Manage Additional Access</b>	Copy Proposal
Export Budget	Terminate Proposal
Copy Proposal	
Terminate Proposal	

## Instructions on How to Create the SF424 Application Package

1. Execute "Create SF424" activity.



2. Select (1) any cost share types and (2) optional forms **for which the proposal data needs to be mapped** into the SF424 Application Package. Leave ALL required forms checked, Select "OK".

Create SF424

If your proposal includes cost sharing, what amount do you want to show on the SF424 forms?

Mandatory 1

Voluntary

Unrecovered

Are unrecovered indirect costs explicitly allowable as cost sharing per the solicitation?

Yes  No [Clear](#)

Select the forms to map:

	Status
2	Optional Forms
<input type="checkbox"/> Research & Related Budget V1.3	
<input type="checkbox"/> Research & Related Subaward Budget Attachment(s) Form 5 YR 30 ATT V1.3	
<input type="checkbox"/> PHS 398 Modular Budget V1.2	
<input type="checkbox"/> PHS 398 Cumulative Inclusion Enrollment Report V1.0	
<input type="checkbox"/> Planned Enrollment Report V1.0	
3	Required Forms
<input checked="" type="checkbox"/> Research & Related Senior/Key Person Profile (Expanded) V2.0	
<input checked="" type="checkbox"/> Research & Related Project/Performance Site Location(s) V2.0	
<input checked="" type="checkbox"/> Research & Related Other Project Information V1.3	
<input checked="" type="checkbox"/> PHS398 Cover Page Supplement V2.0	
<input checked="" type="checkbox"/> SF424 (R&R) V2.0	
<input checked="" type="checkbox"/> PHS 398 Research Plan V2.0	

By clicking "OK", this activity will create your SF424 application which can be accessed from the SF424 Summary tab on the proposal workspace.

4
OK Cancel

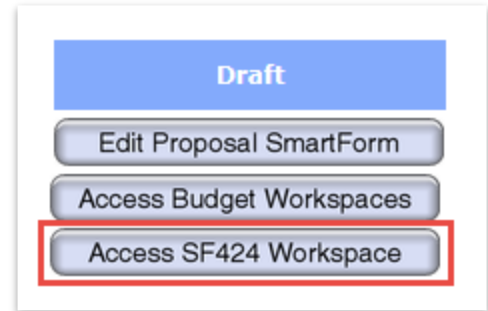
3. DO NOT CLOSE THE POP UP BOX WHILE THE FORMS ARE PROCESSING. LET PROCESSING COMPLETE AND THE BOX WILL CLOSE ON ITS OWN.

4. Once the forms have finished processing you will land back in the Proposal Workspace.

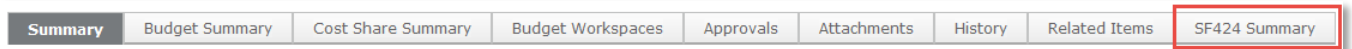
5. Access the SF424 Workspace by either:

Clicking the new button "Access SF424 Workspace" which is now available;

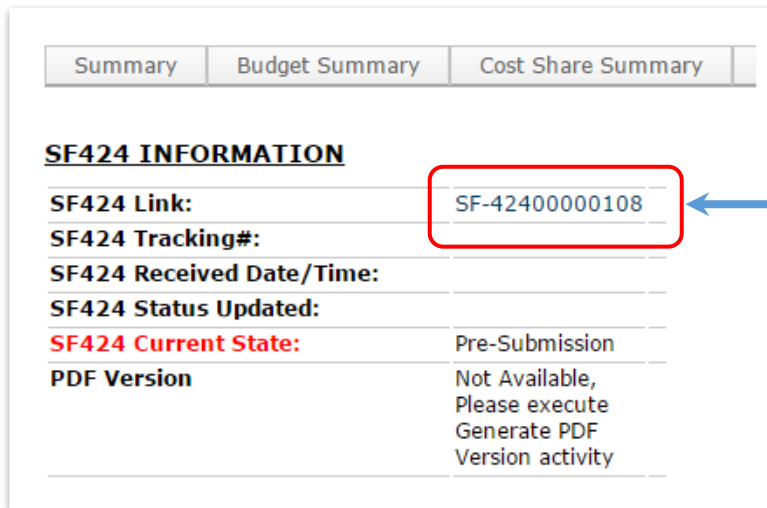
or....



Alternatively, go to **SF424 Summary tab...**

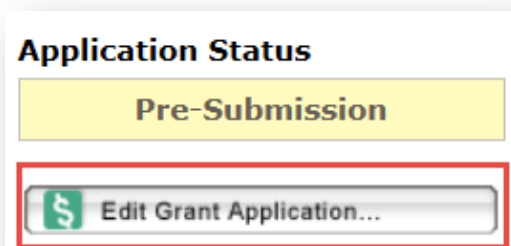


..and access via the SF424 Link.



*Click the SF424 link to access the SF424 Workspace*

6. Once you are in the SF424 Workspace, open the SF424 Application Package by clicking on "Edit Grant Application" button.



- Complete the "Application Filing Name" as appropriate. If the FOA gives no instruction for completing this filed, enter an internal filing name of your choice.

**Application Filing Name:**

- Select **Optional forms to be INCLUDED in the SF424 Application Package.**

**Following forms are optional, Please select any that you wish to include in your application:**

Form Name
<input checked="" type="checkbox"/> Research & Related Budget V1.3
<input checked="" type="checkbox"/> Research & Related Subaward Budget Attachment(s) Form 5 YR 30 ATT V1.3
<input type="checkbox"/> PHS 398 Modular Budget V1.2
<input type="checkbox"/> PHS 398 Cumulative Inclusion Enrollment Report V1.0
<input type="checkbox"/> Planned Enrollment Report V1.0

You will **not** be able to edit the selection of mandatory forms as these forms are REQUIRED to be included in the SF424 Application Package.

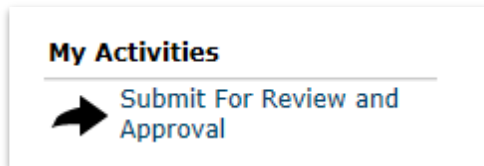
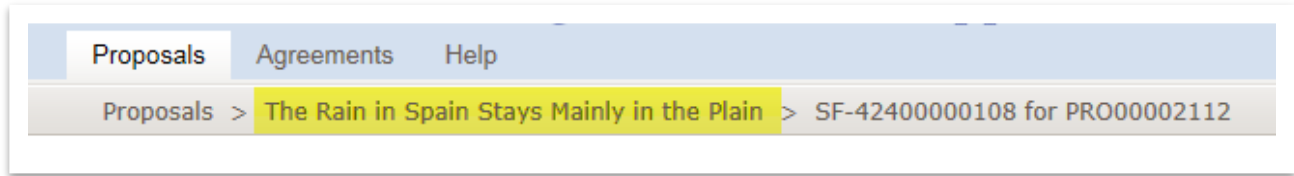
- Click "Continue" button.
- Complete all fields and attachments on each page of the SF424 Application Package as appropriate. If you have subawards, enter the number or Subawards that are going to be included in your SF424 Application Package in the field at the top of the "R&R Subaward Budget – Number of Subawards" form. **Click "Save"** (unless you intend to enter the subaward budget information manually – NOT recommended) and **SKIP ALL SUBAWARD PAGES BY USING THE "JUMP TO" OPTION ON THE DROP-DOWN MENU to go directly to the form immediately after the Subaward forms.** Continue completing all fields and attachments on each page. **See the Importing Subawards Instructional Guide for further information.**
- When you reach the "End of Forms" page click "Finish", this will land you back in the SF424 Workspace.
- Click "Hide/Show Errors". Correct Errors in the SF424 SmartForm and attachments until there are no more Errors. "Exit and Save Changes" will take you back to the SF424 Workspace.

The screenshot shows the top navigation bar with buttons for '<< Back', 'Save | Exit', 'Hide/Show Errors' (highlighted with a red box), 'Print...', 'Jump To: End Of Form Pages', and 'Finish'. Below the navigation bar is a blue 'Error/Warning Messages' section (also highlighted with a red box) containing a 'Refresh' button. A table below lists the error messages:

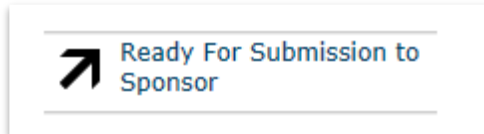
Message	Field Name	Jump To
Please complete R&R Subaward Budget 2.	R&R Subaward Budget 2	R&R Subaward Budget - Number of Subawards

- Review all Warnings and correct any that are applicable to your SF424 Application Submission.

14. From the SF424 Workspace, use the breadcrumb trail to go back to Proposal Workspace. If you have not already done so, execute "Submit For Review and Approval" to send the Proposal through workflow approvals.



If the Proposal has completed workflow approvals and the SF SF424 Application Package is now final, execute "Final and Ready for Submission to Sponsor" activity to alert DSP that the SF424 Application Package is ready for final review and submission to sponsor.



**Contact Information:**

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