

EPRF CHECKLIST - SOM

PREPARATION

- Read the abstract
- Open the proposal in the sponsor portal

PROPOSAL TAB

- Project title matches the proposal in the sponsor portal/application forms
- Short Title includes correct SOM Prefix (MD-Dept), e.g. MD-PEDT, MD-CVRC
- Proposal type matches the proposal in the sponsor portal and is linked to existing Research Idea if Renewal/Resubmission/Supplemental
- Activity type matches proposal information
 - Double check that it is or is not a clinical trial. If the clinical trial button is checked make sure the F&A rate is correct (follow [F&A Rate Guide](#))
- Period of performance matches the proposal in the sponsor portal
- Additional information field [in ePRF] should include relevant proposal information, e.g. the proposal number, notes about the sponsor system, fellow name, who will submit the proposal if not OGC, and notes about documents requiring signature
- Additional information field [in ResearchUVA Action screen] should include the proposal number and/or fellow name (if applicable) – to be completed by SOMOGC

SPONSOR TAB

- Verify sponsor deadline date and time
- If limited submission, verify that permission to submit is attached in documents
- Verify Immediate and Originating sponsor information matches proposal/award information
 - For “New” sponsors – proposal cannot be closed out until sponsor is confirmed and added to ResearchUVA database by OSP Info Team – to be completed by SOMOGC

PERSONNEL TAB

- PI and Senior/Key personnel - Last Disclosure Date is within the past 12 months and Last CITI Training is within the past four years
- For Fellowship applications – UVA mentor is PI of record on ePRF, Fellow is named as PI in Senior/Key Personnel section or is noted in Additional Information field as above
- Check that all personnel named as Senior/Key in sponsor application are named on ePRF

BUDGET TAB

- Cost share, if applicable, is documented and approved with source PTAO
- F&A rate is correct per [F&A Rate Guide](#). Waiver or documentation of non-standard rate is included in documents
- Direct/Indirect Costs match the amounts in the final submitted budget
- Effort commitments match the final submitted budget and are shown in the ePRF in % effort, not calendar months
- If internal subaccounts are required, ensure fiscal contact and org number for the internal account is included in the Additional Information box. If possible, a separate budget should be included for the internal subaccount
- If subcontracts are included, ensure that the CCF, SOW, and budget for each sub are uploaded
 - If the subrecipient will cede to UVA's COI policy, ensure that updated disclosures are included for all COI Investigators with the proposal and COI training will be completed through CITI before time of award

COMPLIANCE TAB

- If animal or human subjects are to be used, ensure the proposal, SOW, and/or budget accurately reflect this activity
- If activities will be performed outside the U.S., ensure the sponsor allows such activity

SCIENCE TAB

- For clinical trials, include protocol title as SOW/Abstract

DOCUMENTS TAB

- Supporting documents should be included as necessary for
 - Approvals/Signatures not captured online
 - Solicitation/Sponsor application guidelines
 - IRB/IACUC approvals
 - Non-standard F&A rates
 - Any other necessary sponsor- or project-specific information
- Documents uploaded to the sponsor portal or into a combined application package should not be uploaded individually to the ePRF
- For clinical trials, upload the protocol to the Full Proposal field and the CTA/Contract to the Other field
- Ensure all files have recognizable file names

APPROVALS

- PI
- PI's Department Chair (or chair/director of Proposal/Award org, as applicable)
- Senior/Key Personnel
- Department Chair for all Senior/Key Personnel
- School Administrator for all Senior/Key Personnel