**Update and Validate the SF424**



**Work Instructions:**

During your review, you may determine changes are required to the SF424 (for Grants.Gov submissions). There are several steps required to update and validate the SF424.

**Assess Changes Required**

* For significant changes, such as changes to budget numbers or project personnel, send the proposal back to the proposal team to make the changes.

Note: Steps for requesting changes to a proposal are covered in other work instructions.

* For small administrative changes, such as correcting spelling errors or changing an email address, update the proposal (and SF424) yourself.
  + For mapped data (data that resides in the proposal), update that data in the proposal pages and then create the SF424 to remap the data to the appropriate fields.
  + For non-mapped data, update that data right in the SF424.

**Open the SF424 for Editing**

By default, when a proposal is in Specialist Review, the SF424 is not editable. You must “unlock” it so you can make changes (applies to both mapped and non-mapped fields).

1. Log into Click Portal.
2. From your Inbox, on the SPO Tasks tab, open the proposal in Specialist Review.
3. From the proposal workspace, in the Proposal Information area, click the SF424 link.
4. From the SF424 workspace, click **Reopen for Edit** to allow updates to the SF424 application.
5. At the top (under the Grants tab), click the proposal name breadcrumb to return to the proposal workspace.

**Edit the Proposal or SF424 Pages**

Edit the proposal pages or SF424 application as needed:

* **Funding Proposal:** Click the **Edit Funding Proposal** button on the left.
* **SF424:** From the proposal workspace, in the Proposal Information area at the top, click the SF424 link. From the SF424 workspace, click **Edit Grant Application**.

Note: Only edit non-mapped fields in the SF424 application. Edits to mapped data will be overwritten when you create the SF424 application (steps below). If this happens, make the changes in the proposal and create the SF424 again.

**Update SF424 Attachments**

1. From the proposal workspace, click **Update SF424 Research Plan**. The pop-up windowlists thedocuments you up can update in the SF424.You will not be able to update the following documents using this activity:

* **Additional Personnel Documents (e.g., biosketches):** Upload these on the appropriate page of the funding proposal as these are mapped to the SF424.
* **Budget Justification Documents:** Upload these on the appropriate page of the SF424.

1. Add, update, or delete SF424 documents as follows:

* To add a document, click **Add**, browse for the document, and click **OK**.
* To update a document, click **Upload Revision** next to the document. Browse for the document and then click **OK**.
* To delete a document, click **Delete** next to the document and then **OK**.

1. When finished updating SF424 attachments, click **OK** to return to the proposal workspace.

**Create the SF424 Application**

After you have finished making all the necessary changes the proposal and SF424 application (including updating attachments), perform these steps:

1. From the proposal workspace, click **Create-Update SF424** on the left.

Note: Executing this activity maps data from the proposal to the SF424.

1. The required forms are selected by default. Select any other forms, if appropriate, and click **OK**.

**Validate the SF424**

1. From the proposal workspace, in the Proposal Information area at the top, click the SF424 link.
2. From the SF424 workspace, click **Validate Submission** to check the SF424 for errors. If no errors, click **OK**. Otherwise, fix all errors listed in the Error/Warning Messages pane:
3. Click the Jump To link to go to that page.
   * + - For mapped data, return to the proposal and update the data there. Next, execute the Create-Update SF424 activity to update the SF424 and then revalidate the SF424 to ensure the errors were fixed.
       - For non-mapped data, update the field with the error (right on the SF424 page).
4. Click **Refresh** on the Error/Warning Messages pane to update the information. The item you fixed will disappear from the list.
5. Repeat the steps above to fix all errors.
6. When all errors are fixed, exit the SF424 and revalidate the submission.
7. Click **OK** to include the forms listed in the SF424 application. You will return to the SF424 workspace.
8. From the SF424 workspace, click **Generate PDF Version** and then **OK** to create a PDF of the SF424 application. (To access the PDF, click the **[View]** link in the general information area of the SF424 workspace.)
9. At the top (under the Grants tab), click the proposal name breadcrumb to return to the proposal workspace.

The proposal is still in Specialist Review.

