

Research Pre-Award Intake Improvements FAQs

Updated: 8/24/2026

1. What is the Research Pre-Award Intake Improvements initiative?

The Research Pre-Award Intake Improvements initiative includes both Proposal and Grants (P&G) and Contracts and Awards (C&A) Divisions within the Office of Sponsored Research (OSR). It is a focused effort to better support the people involved in pre-award intake by:

- Transitioning to a more consistent intake process.
- Reducing unnecessary administrative effort.
- Creating the capacity needed for work that requires their expertise.

This work is one component of a larger, ongoing effort across UCSF, known as the Elevate program. Elevate includes multiple initiatives that support our missions by:

- Building stronger systems and processes that support our people.
- Reducing administrative friction in how we work – both locally and across the enterprise.
- Preparing UCSF to adapt and evolve for the future.

2. Which portions of the Project Life Cycle are being addressed by the Research Pre-Award Intake Improvements initiative?

For this initiative, research pre-award is defined as the compliant submission of sponsored research grant and contract proposals to an external sponsor on behalf of the University. The portions of the [Project Life Cycle](#) within OSR that are in scope for this initiative include:

- Find Funding
- Plan Project
- Develop Budget
- Compile Proposal
- Submit Proposal

3. When are new capabilities being rolled out?

August 24, 2026

Following a successful pilot, the new Smartsheet Proposal Notification Intake Form is being rolled out to all PIs who intend to initiate federal and non-profit proposals, supplements, progress reports, and incoming subawards with the Proposals and Grants Division of OSR. PIs will attach the current Word Proposal Intake Form (PIF) to complete applicable requests.

Fall 2026 (date TBD)

Starting in phases this fall, PIs will transition from the Smartsheet Proposal Notification Intake Form to an electronic Proposal Intake Form (ePIF). It will be used by both the Proposal and Grants Division of OSR. The ePIF:

- Is web-based and accessible through MyAccess.
- Serves as a single “front door” to initiate proposals, incoming subawards, progress reports, and view key post-award information.

4. What capabilities are included in the Smartsheet Proposal Notification Intake Form?

The Smartsheet Proposal Notification Intake Form is an *interim*, standardized intake tool that will document and track proposal notifications for the Proposals and Grants Division.

The Smartsheet Proposal Notification Intake Form:

- Replaces calling, texting, and emailing P&G to initiate the intent to submit proposals, supplements, incoming subawards, and progress reports.
- Requires department approval before initiation.
- Timestamps the intake process step and ensures the required information is provided (upload the Word PIF).
- Enables workload management and reporting on:
 - How many proposals are initiated
 - Timeframe between due and notification
 - Number of proposals approved, declined, and withdrawn
 - Completeness of initiation information

5. What capabilities are included in the ePIF that will replace Smartsheet in the fall?

The ePIF is the *long-term*, standardized intake tool. It will be rolled out to both Divisions within OSR in phases. The ePIF will:

- Enable providing tailored, consistent, complete information.
- Support eNotifications to OSR and proposal tracking.
- Provide visibility to declined and withdrawn proposal.
- Serve as a single “front door” for PIs to initiate and view select pre-award data.
- Afford access to process, policy, and regulatory requirements.

6. What's not changing?

There is no change to how proposal approvals are solicited or provided.

PIs can still reach out through existing channels to ask questions and receive guidance from the P&G Team after they begin using the Smartsheet Proposal Notification Intake Form to initiate federal and non-profit proposals, supplements, progress reports and incoming subawards.

The same will be true when the Smartsheet Proposal Notification Intake Form is replaced in phases by the ePIF for both Divisions within OSR.

7. Why are we transitioning first to Smartsheet on August 24, then to ePIF this fall?

It's critical that OSR leadership has the visibility to demand data that the Smartsheet Proposal Notification Intake Form will supply. This will ensure P&G Team staffing is managed appropriately to support upcoming NIH Cycle III deadlines. However, there are additional benefits of adopting Smartsheet, then transitioning to ePIF, as indicated below:

Prepare for Impending Deadlines

- NIH Cycle III deadlines will be high volume.
- The Smartsheet Proposal Notification Intake Form will provide **immediate** tracking and visibility to demand volume **in real time to manage the NIH Cycle III deadlines.**
- P&G leadership will use **Smartsheet data** to allow the P&G team **to flex temporary staffing, as used in the pilot phase during the NIH Cycle II deadlines.**

Ensure Reliable Demand Data and Standardized Intake

While using the Smartsheet Proposal Notification Intake Form

- We'll have time to validate that the data used to measure request volume, workload, and staffing needs is reliable.
- We can "test drive" the standard intake form and improve the process it supports before we finalize the design for the ePIF and spend money to automate it.

Benefit from User Feedback

User feedback on the Smartsheet Proposal Notification Intake Form and User Acceptance Testing (UAT) for the ePIF is essential to our success. User feedback will:

- Be incorporated into the Proposal and Grants Division ePIF design.
- Reduce rework after the ePIF goes live this fall (phased rollout).

Minimize Risk

By introducing the standardized processes as the Smartsheet Proposal Notification Intake Form is rolled out, we can shorten the learning curve and pave the way for smoother adoption of the ePIF.

Increase Cross-Team Collaboration

- We are preparing our teams – *both* departments *and* both divisions within OSR – for a new way of working.
- Beginning that journey with the Smartsheet Proposal Notification Intake Form helps us to grow together.

8. Why are we improving the research pre-award intake process?

We are improving the research pre-award intake process because our current process is inconsistent and fragmented. Too many communication channels, handoffs, delays, and routing issues create unnecessary administrative friction. This leads to:

- An inconsistent experience for PIs and OSR Staff.
- The inability to tailor information by request type.
- More back and forth than is necessary.
- Lack of visibility to demand metrics for intake, as well as to the P&G Team's workload.
- Inefficiencies in prioritizing or reallocating P&G Team work to cover PTO and leaves.

9. What are the desired outcomes of this initiative in 2026?

This initiative will achieve these outcomes by year's end:

- Digital intake using a standardized form and a single "front door" for PIs to initiate requests across both divisions within OSR through the ePIF.
- Automated tracking and routing.
- A more streamlined way of getting work done that benefits both OSR and PIs.
- An improved service level.
- Preparation for the adoption of the new Research Gateway Grants and Agreements software and transitioning away from current software systems.

10. What new capabilities will follow the Smartsheet Proposal Notification Intake Form and ePIF?

Research Gateway Grants and Agreements and Project One (Oracle) are scheduled to be rolled out on July 1, 2027. These two systems, developed in tandem and integrated upon go-live, will enable proposal submission, compliance workflows, award setup, and financial management.

11. Who is involved in this initiative?

Executive Sponsors

- Sam Hawgood
- Catherine Lucey
- Talmadge King / Andy Josephson
- Erin Gore
- Mike Clune

Program Leads

- Joe Bengfort
- Cheryl Meliones

Initiative Owners

- Clarice Estrada
- Hal Collard
- Angelica Martinez

Operational Leads

- Calleen Roper
- Mandy Terrill

End User Leads

- Mounira Kenaani
- Michelle Stevens
- Mary Mansfield

IT

- David Aaronson
- Brian Peterson
- Kevin Nourse

Project Management: Jason Rivera

Change Management: Doug Jackson