IPETT - EHP - User Help

The EHP (Earthquake Hazards Program) Version of the Integrated Proposal and Evaluation Tracking Tool (IPETT) is designed by USGS to support the organization, reviewing and collection of deliverables for the scientific community. Our focus is to provide flexible workflows that facilitate the grant collection, review and approval process.

Integrated Proposal and Evaluation Tracking Tool (IPETT)

- Plans, facilitates, and conducts research to aid in the resolutions of mission area agendas
- Promotes technology transfer and the dissemination and application of research results
- Provides for the training of scientists and engineers through their participation in research
- Provides for competitive grants to be awarded under through the grants.gov process

Project Owner: Gail Montgomery

Browser Requirements

Browsers currently supported:

- Google Chrome.
- Mozilla Firefox.
- Internet Explorer v11 or later.

Registration

To gain access to IPETT you need to register one of the following:

Department of Interior Employee

Department of Interior employees can log in to IPETT with their Active Directory credentials. Access to IPETT should be sent to you in the first correspondence or send request to ipettsupport@sciencebase.gov.

Non- DOI (Department of Interior Employee)

- Must be sponsored by a USGS employee and have an Active Directory account for access to IPETT. Access to IPETT should be sent to you in the first correspondence or send request to ipettsupport@sciencebase.gov.
- Here are instructions on how to sign up for an Active Directory account:
    - Go to https://my.usgs.gov/resources. In the Identity Management section, click on "Sign Up".
    - Enter an email address and a CAPTCHA.
    - You will then receive a registration email with a link to follow to enter your email address, first and last name, and the email of your USGS sponsor.
    - Once you submit the registration, an email will be sent to the sponsor to verify registration.
    - After the sponsor verifies the registration, you will receive an email from myUSGS with a username and password.

Logging In

- Navigate to URL - https://www.sciencebase.usgs.gov/ipett/.
- Click **Log in** at the top of the page.

DOI Users

- Please use your Department of Interior email address and your Active Directory (AD) password.

Non-DOI Users

- Please use your my.usgs.gov username (the public email address you registered in the **Registration** steps) and password.
- Click **Login.**

Forgotten Passwords

- **DOI Users**
    - If you forget your password contact the **USGS Service Desk at 703-648-HELP (4357).**
      or
    - You can use the USGS Service Desk Web Page as well. (Requires USGS intranet access

- **Non-DOI Users**
    - Forget your Password?
    - Reset your password here - https://my.usgs.gov/resources/main/forgotPassword

RFP (Request for Proposals) Setup

Once you are logged in to IPETT the house icon in the navigation bar will take you back to the main landing page where you will have access to RFP list, New RFP, Proposal List, New Proposal, Proposal Review List, Criteria, Institutions, all Contacts, Principal Investigators and Reviewers.

Criteria, Institutions, all Contacts, Principal Investigators and Reviewers should all be added in detail before starting an RFP or proposal when possible. All of these areas are drop down selections within the setup RFP and Proposal forms. You find them under the Manage section of the landing page https://www.sciencebase.usgs.gov/ipett/.

Adding a New Contact, Coordinator, PI and Reviewer

*Note: All fields that are required are indicated by *.*

You can add and edit PI's, reviewers and Contacts through all Contacts.

On the home page under **Manage**

- Click **all Contacts:.**
- On the Contact List page in the navigation bar click **+ New Contact.**
- Select the **Type**: Contact, Coordinator, PI, or Reviewer.
- Enter contact Email.
  Note: Entering a known email address will automatically populate the fields.
  Or
- Fill in desired Contact **Name.**
- Fill in desired Contact **Organization.**
- Fill in desired Contact **Title.**
- Fill in desired Contact **Phone.**

Adding a New Principal Investigator from PI List

On the home page under **Manage**

*Note: All fields that are required are indicated by *.*

- Click **Principal Investigators.**
- On the Contact List page in the navigation bar click **+ New PI.**
- Enter contact Email.
  Note: Entering a known email address will automatically populate the fields.
  Or
- Fill in desired Contact **Name.**
- Fill in desired Contact **Organization.**
- Fill in desired Contact **Title.**
- Fill in desired Contact **Phone.**

Adding a New Institution

On the home page under **Manage**

*Note: All fields that are required are indicated by *.*

- Click **Institutions.**
- On the Institutions List page in the navigation bar click **+ New Institution.**
- Fill in desired Institution **Name.**
- Fill in desired Institution **Short Name.**
- Fill in desired Institution **State Code.**
- Click **Create.**

Adding a New Criteria

On the home page under **Manage**

*Note: All fields that are required are indicated by *.*

- Click **Criteria.**
- On the Criteria List page in the navigation bar click **+ New Criteria.**
- Fill in desired criteria **Name.**
- Click **Create.**
  Note: On the Criteria page you will want to add Criterion. You can add as many criterion as you need. These will show up in both the individual review as well as the group/panel review.
- Click **+Add Criterion.**
- Select a **Type.**
  Note: You will add the type you wish to see in the review process.
    - **Score -** is an input from 0 (lowest) to 10 (highest) rating scale for each criterion
      10 indicates that the proposal is fully satisfied and 0 indicates that the proposal did not satisfy the benchmark.
      Note: this score will indicate the amount of funding in the Final Funding Decision.
    - **Comment -** enter up to 3 Proposal Strengths and 3 Proposal Weaknesses in the dialog boxes provided
      Short but descriptive responses in bullet form are acceptable and appreciated.
    - **Rating Scale** – This will display as stars and is an overall rating using the scale of 1=Poor to 5=Excellent.
    - **Approval Scale -** This will display as a heat signature and is an overall rating using the scale of 1=Poor to 5=Excellent.
    - Fill in a **Name** and **Description** (if desired).

Reviewers List

On the home page under **Manage**

- Click **Reviewers.**

Note: You can only view Reviewers List. To add reviewers, add through all Contacts.

Viewing and Editing an Existing Contact

- Click **all Contacts:.**
- On the Contact List page sort or select the contact you wish to Edit or view.
- Select the contact. You will be taken to their view page.
- Click **Edit** to modify contact.
- Enter contact Email.
  Note: Entering a known email address will automatically populate the fields.
  Or
- Fill in desired Contact **Name.**
- Fill in desired Contact **Organization.**
- Fill in desired Contact **Title.**

- Fill in desired Contact **Phone.**

Creating an RFP (Request for Proposals)

- Click **+New RFP.**
  *Note: All fields that are required are indicated by *.*
- Select a grant **Type** from the drop down.
- Enter a **Fiscal Year**.
  Note: Use the 4 digit year XXXX.
- The **RFP Stage** is moved through the work flow using the buttons at the bottom of the RFP.
  The first stage will start at **Setup**.
  Note: Once you have moved past a stage you can open the RFP and change the Stage back to one you may have moved past.
- Enter the **Budget** that you will be working with.
- Select a **Criteria** from the drop down list. (See **Adding a new criteria:** to add to the list).
- Select all the **Reviewers** that will be reviewing the proposals. (See **Adding a new contact, Coordinator, PI and Reviewer:** to add to the list).
- Click **Create** to save your entries.
- Click **Cancel** to delete all entries and go back to your previous screen.
- After the RFP is created you will click **Open Proposal Submissions** in order to add proposals.
- Click **OK** to move this RFP to the next Stage to allow Proposal Submissions.

Editing an RFP

- Once you have created your RFP you may edit the RFP at Setup, Proposal Submissions, Submissions Verification, Individual Review, Review Verification, Group Review and Admin Review stages.
  Once an RFP is in Projects Live, Closed or Cancelled you will not be able to edit, you will only be able to view the RFP.
  You may also delete the RFP from the show page.

WARNING: This will delete all Proposals/Projects associated with this RFP!

To Edit the RFP

- From the home page click **RFP List** in the navigation bar.
- You can filter by Type, Fiscal Year, Stage and Criteria.
- Click on the RFP **Type** or **Fiscal Year** to access your RFP**.**

To Delete the RFP

- Click **Delete**

WARNING: This will delete all Proposals/Projects associated with this RFP!

- You will receive a pop up, click **OK** to confirm or click **Cancel** to stop the deletion of the RFP.

To Make Changes

- Click **Edit**.
- Click **Update** to save changes.
- Changes will be lost when you click **Cancel.**

RFP Stages

Note: The stages are in sequential order. Each stage must have the previous stage completed to move on. Access though RFP list and specific RFP you are moving.

1 - Setup - setup in progress.

2 - Proposal Submissions - At this stage you are able to submit proposals.

To start Proposal submissions:

- From the RFP show page click **Open Proposal Submissions.**
- Click **OK** to move this RFP to the next Stage to allow Proposal Submissions.

3 - Submissions Verification – All proposals need to be registered or canceled.

To start Submissions Verification:

- From the RFP show page click **Verify Submissions.**
- Click **OK** to close the Proposal submission window and start the verification of submissions Stage.
- Notifications are sent to PIs and Collaborators that the Proposal is in our system and reviews will start shortly.
  You may move the RFP to Projects Live, this will skip the review process.
- From the RFP show page click **Project Live**.
- Click **OK** to move this RFP to Projects Live Stage.
  Note: This will apply funding decision to all Proposals: partially and fully funded Proposals will be accepted, not funded Proposals will be rejected.

4 - Individual Review - All submissions are verified.

To start Individual Review:

- From the RFP show page click **Start Individual Review.**
- Click **OK** to close the Proposal submission window and start the verification of submissions Stage.
- Notifications are sent to Reviewers notifying them of proposals to review.
  Note: If you add reviewers after the phase starts they will not be auto notified.
- Reviewers are able to edit their assigned proposal review page in this stage.

5 - Review Verification – All individual reviews are complete.

To start Review Verification:

- From the RFP show page click **Close & Verify Reviews.**
- Click **OK** to end individual reviews.
- If you need to reopen the Individual Review stage click **Start Individual Review**.
- Click **OK** to open this RFP's Proposals to individual reviews.

6 - Group Review - All proposals are registered and individual reviews are completed and verified.

To start Group Review:

- From the RFP show page click **Start Group Review.**
- Click **OK** to move this RFP to the Group Review Stage.
- Notifications are sent to PIs, Collaborators that their proposal has completed the review process and they will be notified as to the final decision in the coming weeks.

To see the Group Review Show page:

- From the RFP show page click on **Proposal List…**
  Note: This is the place where you'll look at the reviews together during the meeting. This will show you an overview of the proposals and how they were reviewed.
- To see the breakdown of how each person voted click on the number (example **4/4)** in the **Review** column.
- Previous Score vs Score.
  - **Previous Score** is the score that was present at the end of the Individual Reviews.
  - As Reviewers make changes to the scores during the Group Review these are reflected in the **Score** column.

7 - Admin Review - Final admin review.

To start Admin Review:

- From the RFP show page click **Start Admin Review.**
- Click **OK** to move this RFP to the Admin Review Stage.
- During the admin review, managers can make adjustments to the scores provided by reviewers.
  - To make changes to a proposal's review?
  - From the RFP show page.
  - Click on the **Proposal List…**
  - Click on the number (example **4/4)** in the **Review** column.
  - Click on the name of the reviewer you wish to change.
  - Click **Edit.**
  - You can make changes to any field, including fields related to the original criteria.
  - Click **Update** to save your changes.
- You can click **Apply Funding Decisions.**
- Click **OK** to apply funding decision to all Proposals: partially and fully funded Proposals will be accepted, not funded Proposals will be rejected.
- You will be taken to the Proposal List, you will be able to adjust any of the proposals before going live.
- Proposal will have individual **Accept Proposal** and **Reject Proposal** buttons.
- Click **Accept Proposal** (funded) or **Reject Proposal** (not funded).
- All Proposals need to be moved to accepted or rejected.

8 - Projects Live - All projects on-going.

To move to Projects Live:

- From the RFP show page click **Projects Live**
- Click **OK** to apply funding decision to all Proposals: partially and fully funded Proposals will be accepted, not funded Proposals will be rejected.
- Promised deliverables are added.
- Deliverables are reviewed on each accepted proposal.

9 - Closed - All projects are closed or completed.

To move to Closed:

- From the RFP show page click **Close RFP.**
- Click **OK** when you are sure you want to CLOSE this RFP.

10 - Cancelled – Entering this will cancel all proposals associated with the RFP.

To cancel:

- From the RFP show page click **Delete.**
- Click **OK** when you are sure.
- This can be done at any RFP stage.

Adding a Proposal to an RFP

To access the **Create Proposal** digital form there are two ways:

- Through the RFP.
  - From the home page click **RFP List** in the navigation bar.
  - You can filter by Type, Fiscal Year, Stage and Criteria
  - Click on the RFP **Type** or **Fiscal Year** you wish to add a proposal
  - Once on the RFP show page click **+Add Proposal**
  - Through **New Proposal**
    - From the home page click **+ New Proposal**

Note: The auto populated RFP will be based on the most recent fiscal year. Only RFP's that are open to receive submissions will display in the dropdown. You will need to change to the RFP you wish to add a proposal.

Create your proposal by uploading a Zip file.

- On the Create Proposal page find **Import Proposal Data from Zip File.**
- Click **Browse…** to select a file.
- Select the Zip file.
- Click **Create** to apply the Zipped data.
- The available data will auto populate the form.
- Click **Edit** to fill in all additional fields that apply to the RFP.

*Note: All fields that are required are indicated by *.*

Adding Expected Deliverables to a Proposal

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Once on the Proposal show page click **Edit.**
- Click **+ Add Deliverable.**

*Note: All fields that are required are indicated by *.*

- Select a **Type** from the drop down.
- Fill in desired **Name**.
- Fill in desired **Description**.
- Check if you have an **Example**.
- Fill in desired **Due Date** or leave empty to default to Proposal End Date.

Editing a Proposal

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Once on the Proposal show page click **Edit.**

Reviewing Proposals

Individual Review

- All Proposals need to be registered or canceled.
- The RFP stage will be placed into Individual Review. (See stages **Individual Review)**
- Notifications are sent to Reviewers notifying them of proposals to review.
- Log in as a Reviewer. (See **Logging In)**
- 1 - From the Home page find **Click to access all your Reviews.**

- Click **Reviews.**
  Or
- 2 - From the Home page click **Proposal Review List**.
- On the Review Proposal List select the proposal name in the **Review Proposal** column.
- Click **Download** to access all documents**.**
- Click **Edit.**
- Add your comments and scores.
  - **Score -** is an input from 0 (lowest) to 10 (highest) rating scale for each criterion
    10 indicates that the proposal is fully satisfied and 0 indicates that the proposal did not satisfy the benchmark.
    Note: This score will indicate the amount of suggested funding in the Final Funding Decision. 10=100%
  - **Comment -** enter up to 3 Proposal Strengths and 3 Proposal Weaknesses in the dialog boxes provided
    Short but descriptive responses in bullet form are acceptable and appreciated.
  - **Rating Scale** – This will display as stars and is an overall rating using the scale of 1=Poor to 5=Excellent.
  - **Approval Scale -** This will display as a heat signature and is an overall rating using the scale of 1=Poor to 5=Excellent.

Group Review

- All Individual Reviews are completed and verified.
- The RFP stage will be placed into Group Review. (See stages **Group Review)**
- Notifications are sent to Reviewers notifying them of proposals to review.
- Log in as a Reviewer. (See **Logging In)**
- 1 - From the Home page find **Click to access all your Reviews.**
- Click **Reviews.**
  Or
- 2 - From the Home page click **Proposal Review List**.
- On the Review Proposal List select the proposal name in the **Review Proposal** column.
- Click **Download** to access all documents**.**
- Click **Edit.**
- Add the adjusted scores and comments
  - **Score -** is an input from 0 (lowest) to 100 (highest) rating scale for each criterion
    100 indicates that the proposal is fully satisfied and 0 indicates that the proposal did not satisfy the benchmark.
    Note: This score will indicate the amount of funding in the Final Funding Decision. 100=100%
  - **Comment -** enter up to 3 Proposal Strengths and 3 Proposal Weaknesses in the dialog boxes provided
    Short but descriptive responses in bullet form are acceptable and appreciated.
  - **Rating Scale** – This will display as stars and is an overall rating using the scale of 1=Poor to 5=Excellent.
  - **Approval Scale -** This will display as a heat signature and is an overall rating using the scale of 1=Poor to 5=Excellent.

Adding Deliverables to a Proposal

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Find **Proposal Deliverables.**
- Click the deliverables **Name, Type** or **Status.**
- Click **+ Upload New File.**
- Click **Browse…**
- Select the deliverable file you wish to upload.
- Click **Update.**

Deliverable Review

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Find **Proposal Deliverables.**
- Click the deliverables **Name, Type** or **Status.**
- Click **Edit**
- Enter **Delivery Date**
- Input **Rating** from 1 to 5: 1=Poor, 2=Marginal, 3=Satisfactory, 4=Very good, 5=Excellent
- Fill in desired **Comment.**
- Click **Update.**

Proposal Stages

Note: Access though Proposal list and specific Proposal you are moving.

- Registered
  - New proposal registered, submitted and under review. RFP stages 2 – 7
  - All Proposal start at this stage and remain here until Accepted or Rejected.
- Accepted
  - Proposal is accepted and is now a project.
  - From the Proposal show page click **Accept Proposal**.
  - Click **OK** to accept this Proposal.
  - Notifications are sent to PI’s and Collaborators asking to update expected deliverables.
  - PI’s and Collaborators are able to edit the proposal.

- Admin Verification
  - This starts the projects admin verification of deliverables.
  - From the Proposal show page click **Start Admin Verification**.
  - Click **OK** to move this Project to the Admin Verification Stage.
  - Notifications are sent out to Managers that expected deliverable review needs to be completed.
  - You can send the project back to **Accept Proposal**.
  - This will send a notification to PI's and Collaborators asking to update deliverables based on pending award amount.
  - PI's and Collaborators are only able to edit the proposal deliverables if set back to Accept Proposal.
- Funding Verification
  - This starts the projects funding verification.
  - From the Proposal show page click **Start Funding Verification**.
  - Click **OK** to move this Project to the Funding Verification Stage.
  - Notifications are sent out to Managers that the deliverable review is complete and funding needs reviewed.
- Project Live
  - On-going project and deliverable submissions in progress.
  - From the Proposal show page click **Project Live**.
  - Click **OK** to move this Project to the Project Live Stage.
  - Notifications are sent out to PI's and Collaborators that funds are to be released, project is live and awaiting deliverables
  - PI has access to upload deliverable files.
- Deliverable Review
  - Deliverables delivered, admin review in progress
  - (PI) click **Submit Deliverables**
  - Notifications are sent out to Managers that deliverables are uploaded.
- Incomplete
  - The project requires better or further deliverables.
  - From the Proposal show page click **Incomplete Project**.
  - Click **OK** to move this Project to the INCOMPLETE Stage.
  - Notification is sent to PI and Collaborators that the deliverables need to be fixed (may occur several times)
- Complete
  - Project is completed.
  - From the Proposal show page click **Complete**.
  - Click **OK** to set this Project to the Complete Stage.
  - Notification is sent to PI and Collaborators that their deliverables have been accepted and project complete
- Rejected
  - Proposal or Project rejected.
  - From the Proposal show page click **Reject Project**.
  - Click **OK** to REJECT this Project.
  - Notification is sent to
- Cancelled
  - Proposal or project cancelled.
  - From the Proposal show page click **Delete**.
  - Click **OK** to delete this Project.
  - This can be done at any proposal stage.