Topic 1: PI & Project Team Course Topics and Materials

Course Description:
This instructor led training course combines the courses on proposal preparation and unit review, and will prepare project team members and individuals who create & review (or facilitate the review) of proposals in the eResearch Proposal Management (eRPM) system by:

- Facilitating the process to work with Proposal Approval Forms (PAFs) in eRPM
- Providing skills and knowledge to articulate eRPM workflow, create and manage PAFs/proposals, review and approve proposals (or show others how to do this), use system functionality to communicate with others, and view past transactions
- Promoting electronic management of proposals from proposal preparation through submission to sponsor.

This course is broken into two sections:
- PI & Project Team (yellow pages)
- Reviewer (blue pages)

PI & Project Team Section Objectives:
By the end of this course, you will be able to:
- Create and manage proposals and projects using the eRPM system.
- Complete the processes and activities needed to get your proposal submitted to the sponsor.

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Topic 2: Getting Started with Proposal Management

**Goal/Outcome:**
Gain an understanding of Proposal Management, how eResearch supports the process, how to login to eResearch, and resources to get started.

**Objectives:**
After completing this module, you will be able to:

- Recognize the roles of people and groups in managing proposals and projects.
- Recognize how eResearch electronically supports the existing proposal management workflow.
- Login to eResearch.

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eRPM system workflow starts at proposal creation and continues through active project.
eResearch Proposal Management (eRPM) is a new Web-based system to accommodate the electronic routing, approval, and submission of funding proposals to external sponsors, including Grants.gov. eResearch is accessed at http://eresearch.umich.edu/.

Important Information

- If you need a uniqname and a UMICH Kerberos password, go to: http://www.itd.umich.edu/help/faq/uniquenames/
- For optimal viewing of eResearch, the recommended screen resolution is 1024 x 768 or higher.
- eResearch can be viewed using web browser. For a full list of supported browsers and system requirements, go to: http://www.mais.umich.edu/systeminfo/browser_os.html

Tips

- Turn off pop-up blockers so that you can view all elements of eResearch properly. You must be able to view pop-ups to use eResearch.
- To properly receive email messages sent from eRPM, you must be able to view html emails. If you have a plain text e-mail system (e.g., Groupwise), turn on the ability to View HTML messages.

eResearch Home Page

1. Go to http://eresearch.umich.edu/.
2. Click Login under Proposal Management.
3. Enter your Login ID (uniqname or Friend ID) and your Password.

Notes:
- An Mtoken is not required to use eResearch.
- If you are a non-UM user, refer to the Obtaining a Friends Account Step–By-Step Procedure for more information.

4. Click Login.

Verify Information

5. The first time you login to eResearch you will be prompted to verify your contact information.

Enter your contact information, filling in all fields marked with a red asterisk (*).

Your address is populated from your office address from the M-Pathways Human Resources system.

Note: To change your work address:
Complete the Address/Personal Data Form (30005) and return it to the Human Resource Records Office and they will update the address in the hr address data base.
http://www.hr.umich.edu/hrms/forms/pdfs/Addr-PersData2.pdf
You can only have one address in eResearch.

Your address will be maintained automatically for you. The eResearch system has a nightly feed from the M-Pathways system to update addresses.

6. Click Submit.

eResearch Home Workspace

7. eResearch Proposal Management opens and displays your Home Workspace.
Topic 3: Workspaces

We will introduce the PI & Project Team Home Workspace in the morning, use the PAF/Project Workspace as we create the PAF, and lastly later today work with Grants.gov Workspace in eRPM.

Goal/outcome:
- To know how to use the Home Workspace to find information.
- To know how to use the PAF (Project) Workspace to find information and perform activities.
- Understand how the PAF Workspace relates to the Home Workspace.
- Understand how the Grants.gov Workspace relates to the PAF Workspace & Home Workspace.

Objectives:
After initially completing this module, you will be able to:
- Use your PI Project Team Home Workspace tabs to track PAFs/proposals/projects

By the end of the class you will be able to:
- Know how to use the PAF/Project Workspace to find information and perform activities.
- Locate & use your Grants.gov Workspace.
- Find PAFs/proposals/projects by using All PAFs and the filter by method.

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PI & Project Team Home Workspace - Description

Your Home Workspace is your launch pad for eResearch Proposal Management. It allows you to:

- View information about your Proposal Approval Forms (PAFs)/proposals/projects, track where a proposal/project is in the process, and see items that need action in your Inbox.
- Access projects in order to view documents related to a project. The system not only accomplishes the routing and approval tasks, it also provides document storage and access for those project team members and unit administrators who have some relationship to the project.
Announcements are posted on the workspace to alert you of recent news, functionality changes, and other general information.

Your available roles appear.

- If you have multiple roles (e.g., PI & Project Team and Reviewer), click the role name to switch between roles. Your active role appears in bold.
- The role selected determines what is displayed in your Home Workspace. E.g., in the screen shot above PI & Project Team is bold and this is the role used to create PAFs.

Tabs organize your Home Workspace into the following sections:

- **Inbox** – Displays PAFs/proposals that require action by you or your unit.
- **In Progress** – Displays all of your PAFs/proposals that are currently in progress. These could be PAFs that are still being completed, PAFs routed for unit review, or PAFs being reviewed by DRDA.
- **Finalized Proposals** – Displays all PAFs with finalized proposals.
- **Submitted to Sponsor** – Displays all proposals submitted to a sponsor.
- **Award Received** – Displays all proposals that have received an award from a sponsor, but have not been fully processed by DRDA and Financial Operations.
- **Active** – Displays all projects that have had their award processed and are active in the general ledger.
- **Closed** – Displays projects that have concluded and have been closed.
- **Cancelled** – Displays PAFs/proposals that have been cancelled prior to submission to sponsor.
- **Not Funded** – Displays submitted proposals that were not funded by the sponsor or withdrawn by the PI.
eResearch Home Workspace

D Create New PAF – Activity used to create a new PAF.

E Create New User – Use to create eResearch Proposal Management account in order to add person to a PAF (e.g., need to add account for PI or Research Administrator).

F Projects/PAFs/Proposals are listed in your Home Workspace. You can click on the link to access its Project Workspace. You can sort your list by various headers.

G State – Location where the proposal is in the process, e.g., Proposal Preparation, Unit Review, DRDA Review.

H PAFs with Required Action – Displays all PAFs that you still need to do something with (e.g., completing PAF, make changes & submit changes, route for approval, etc.)

I Hardships with Required Action – Displays all proposals with hardship request that require action.

J PAFs Not Yet Signed by PI – Displays all PAFs that have not yet been signed by UM Principal Investigator. PAF Can appear in both PAFs with Required Action & PAFs Not Yet Signed by PI. Use this to quickly find a list of PAFs where UM PI still needs to sign Conflict of Interest Statement/PAF.

K PAFs Assigned to You for Ad Hoc Review – Displays all proposals that you have been assigned to as an Ad Hoc reviewer. You do not have authority to sign/approve proposal, but can enter comments. Only Reviewers can assign Ad Hoc review rights to a proposal.

L Filter by – Allows you to search for proposals by ID (DRDA Number), name, state, UM Principal Investigator or department. You select a Filter by criteria, enter a keyword in the field, and click Go.

Tips:
- Use a percent sign as a wildcard (%). E.g., %Review will return all PAFs that are in the states of Unit Review and DRDA Review.
- Clicking Advanced allows 2 more filter by criteria.
Support Links – Provides links to support resources and materials.

All PAFs – Displays all of your PAFs/proposals in any state.

My Home – Allows you to return to the first page of your Home Workspace from any page in the system.

Logoff – Allows you to exit eResearch.
**How Do I Get to the PAF/Project Workspace?**

Click on the name of the PAF/Project from your Home Workspace to view its PAF Workspace.

**PAF/Project Workspace**

Available for a PAF after it is created. Use it to:

- **View information**
  - PAF/proposal: E.g., basic information, reviewers, activity history, comments, etc.
  - Project: E.g., award information, award documents

- **View Current State** of PAF/proposal/project.
  - Where it is in the proposal process
  - E.g., Proposal Preparation, Unit Review, etc.

- **Complete activities** related to the PAF/proposal
  - Do something with PAF
  - E.g., Edit PAF Worksheet, Sign PAF/Conflict of Interest Statement, Route for Approval, etc.

**Who Can View the PAF/Project Workspace & PAF Worksheet?**

PAFs/proposal packages/projects in eResearch can be viewed by:

- Key Personnel (UM Principal Investigator, Sponsor Principal Investigator, Participating Investigators) listed on PAF
- Administrative Personnel listed on PAF
- Reviewers (departments with personnel, cost sharing, space, other commitments, subprojects/grants, administrative home for a project)
  - Reviewers & Reviewers Who Can Sign (Approvers) are set-up & maintained individually by each department.

**Who Can Edit the PAF/Project Worksheet?**

Key Personnel & Administrative Personnel with Edit rights can edit the PAF Worksheet.

**Note:** Reviewers can make or request changes once a PAF is in Unit Review.

**Important Information**

What can be viewed in the PAF Workspace depends on the PAF’s location in the routing and approval process (State). This document shows examples of:

- **Proposal Preparation** 2
- **Unit Review** 5
- **Active** 6
PROPOSAL PREPARATION STATE

Before a PAF is routed for approval it is in the Proposal Preparation State.

PAF Workspace – Proposal Preparation State

A Current State – Displays the location of the proposal in the routing and approval process. States to pay attention to include:

- **Proposal Preparation**: PAF/proposal is in this state when being completed by PI & Project team.
- **Unit Review**: Proposal has been routed to units for review.
- **DRDA Review**: Proposal being reviewed by DRDA.
- **DRDA Approved: Awaiting Final Proposal**: Proposal approved by DRDA. UM PI or Primary Research Administrator must finalize the proposal before it can be submitted by DRDA or the submission logged by the Project Team.
- **Submitted to Sponsor**: Proposal submitted to sponsor by PI/Project Team or DRDA.
- **Active**: Project active and you can view award information.

B Display PAF Summary – Displays all information entered on individual pages of PAF Worksheet in a printer friendly version.

C Edit PAF Worksheet – Allows you to make changes to the PAF.
Field Description

**PAF Workspace – Proposal Preparation State**

**D SF-424 Summary** – Displays a printer friendly version of all information currently entered on Grants.gov forms. After the Grants.gov forms are complete, successfully validated, and a PDF version generated, you can review all information entered on Grants.gov forms and attached documents. Treat this as a review copy. It is not a preview of what will be submitted. The actual data & attachments are submitted.

**E Grants.Gov Forms** – If you have been given rights to view Grants.gov forms, you will see this link. In order to edit Grants.gov forms, you must be given rights to Read (view) & Edit the Grants.gov forms.

**F Activities** – Displays activities that can be completed. Activities available are based on:

- State of the PAF/proposal (E.g., once route PAF for approval, the PI/Project team is given the option to make changes to the PAF)
- Your role (E.g., only the UM Principal Investigator has the option to the Sign the PAF.)

**G Tabs organize the PAF Workspace into the following sections:**

- **Main** – Displays contact information for PIs, Sponsor PI, the Primary Research Administrator, and the Direct Sponsor. See the next page for more information about the fields on this tab.
- **Contacts** – Displays contact information for Project Personnel, DRDA Project Representative and Administrative Staff.
- **Activity History** – Displays a complete list of the Activities executed on the PAF once the PAF has been routed for approval.
- **Attachments** – Displays the documents that are attached to the PAF/proposal/project.
- **Posted Comments** – Displays comments that are attached to the PAF. These comments are permanent and visible to any person added as key personnel or administrative personnel or the PAF or who has Reviewer access to proposal/project.
PAF Workspace – Proposal Preparation State

**Title** – Displays the project title as entered on the first page of the PAF.

**PAF ID (DRDA Number)** – Displays the PAF ID (DRDA number) that is assigned when the PAF is created. You may see 2 different DRDA formats. Formats for proposals created in eResearch FY-PAF12345 FY-PAF12345-PRE (pre-proposals).

**Personnel** - Displays the contact information for all UM and Sponsor PIs.

**Deadlines** – Displays the deadlines that were entered on the PAF.

**Sponsors** – Displays the direct & prime sponsor information.

**Project Administrative Home** – Displays the Department that is the Project Administrative Home. Clicking on the department name displays contact information.

**DRDA Project Representative** – Displays the Project Representative.

**Recent Activity** – Displays the last 10 activities executed on the PAF including comments, who performed the activity and when the activity occurred. For a complete list, see the Activity History tab.

**My Home** – Allows you to return to your Home Workspace.

**Logoff** – Allows you to exit eResearch Proposal Management.
UNIT REVIEW STATE

After a PAF is routed for approval, it is in the Unit Review state. It will remain in Unit Review until all required departments approve the PAF.

The workspace content is expanded to include additional information.

PAF Workspace – Unit Review State

**R** View PAF Worksheet – the PAF is in a non-editable state (e.g., Unit Review) & worksheet is read-only.

**S** Manage Data – Certain data can be managed without putting the PAF into an editable state by:
- anyone with permissions to edit the PAF
- or Reviewers from the Administrative Home for the PAF.

**T** Additional tabs:
- Change Tracking – Displays a log of all change activities, the name of the person who made the change, and date of the change activity.
- Unit Comments – Place for Unit Reviewers to list comments. Only Reviewers from the same unit can view these comments.

**U** Routing and Approval Status - Displays all Units that are required to review. Contact information for the Unit can be viewed by clicking the name of the Unit in the list.

**V** DRDA Approval Status - DRDA approval status is displayed. This will be populated after the proposal moves out of the Unit Review state and into the DRDA review states. The DRDA approval will be displayed here along with date approved and any pertinent notes.
ACTIVE STATE

After a project as activated, the main workspace information displayed changes.

Project Workspace – Active State

A Title – Displays the project title as entered on the first page of the PAF.

B PAF ID (DRDA Number)

Note: You may see 2 different DRDA number formats. All proposals that were created/entered in eRPM have the new DRDA number format:
FY-PAF12345
e.g., 09-PAF12345

C UM Principal Investigator - Who received the award and date when processed.

D Administrative Home - for the project.

E Post Award - Contact for the award.

F DRDA Project Representative - Contact for the award.
### Project Workspace - Active State (Continued)

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#### Notice ID
- **Format:** Project grant number (PGN) - 0
  - e.g., F123456-0
- Any PAN sent between January 5 – February 24, 2009 has the following format: PGN -1.
- Based on user feedback the Notice ID for PANs was changed to PGN-0 in order to accommodate the standard PAC numbering sequence.
- PACs will increment the Notice ID.
  - First PAC is: PGN-1
    - e.g., F123456-1
  - Second PAC is: PGN-2
    - e.g., F123456-2
Proposal Management Reviewer Home Workspace

Your Home Workspace is your launch pad for eResearch Proposal Management. It allows you to:

- View information about your Proposal Approval Forms (PAFs), track where a PAF/proposal/project is in the process, and see items that need action in your Inbox.
- Access projects in order to view documents related to a project.

  The system not only accomplishes the routing and approval tasks, it also provides document storage and access for those project team members and unit administrators who have some relationship to the project.

Who Can See the Reviewer Home Workspace: People with Reviewer or Reviewer Who Can Sign access (contact your Research Unit Liaison if you need access).

Proposal Management Reviewer Home Workspace

A Your available roles appear.
If you have multiple roles (e.g., PI & Project Team and Reviewer), click the role name to switch between roles. Your active role appears in bold. The role selected determines what is displayed in your Home Workspace.

B Tabs organize your Home Workspace into the following sections:

Inbox – Displays PAFs/proposals that require action by you or your unit. The PAFs that appear are divided into the following categories:
- PAFs with Changes Returned
- PAFs Ready for Review and Approval
- PAFs with Changes Requested
Proposal Management Reviewer Home Workspace

**B** Upcoming – Displays all of your PAFs/proposals that are currently in progress. These could be PAFs that are still being completed, PAFs routed for unit review, or PAFs being reviewed by DRDA.

**Approved** – Displays all proposals that you have approved and those that have had changes made by them. The PAFs that appear are divided into the following categories:
- PAFs with Changes Since Approval
- Approved PAFs

**Submitted** – Displays all PAFs/proposals submitted to a sponsor.

**Active/Closed/Turned Down/Withdrawn** – Displays all projects that are active, closed, have been turned down or withdrawn. The PAFs that appear are divided into the following categories:
- Active
- Award Received
- Closed
- Cancelled
- Not Funded

**Manage Departments** – Lists all departments assigned to you as a Reviewer. Click on the Manage Department to display Reviewers, Reviewers Who can Sign, PAF Email Recipients, and PAN/PAC email recipients for the department.

**C** Projects/PAFs/Proposals are listed in your Home Workspace. You can click on the Name to access its Project Workspace. You can sort your list by various headers.

**D** State – Location where the proposal is in the process, e.g., Unit Review, DRDA Review.

**E** Filter by – Allows you to search for proposals by ID (number), name, state, PI, or department. You select a Filter by criteria, enter a keyword in the field, and click Go.

**F** All PAFs – Displays all of your PAFs/proposals in any state.

**G** My Home – Allows you to return to the first page of your Home Workspace from any page in the system.

**H** Logoff – Allows you to exit eResearch.

**I** Support Links – Provides links to support resources and materials
Find PAFs/Proposals/Projects

You can find Proposal Approval Forms (PAFs)/proposals/projects using either:

- **Filter By**: Search for PAFs in your Workspace tabs using Filter By.
  - The Filter by function is used to narrow a list of PAFs/proposals/projects that share specified criteria such as State or Principal Investigator (PI). You will find this function in your Home Workspace wherever there are PAFs/proposals/projects listed.

- **All PAFs**: Displays a list of all PAFs/proposals/projects that you have permission to view and/or edit. You have permission to view and/or edit based on whether you are:
  - Listed as Key Personnel
  - Listed as Administrative Personnel
  - A Reviewer for a department listed on PAF

### Filter By

**eResearch Home Workspace**

1. Select **Filter by** criteria.

**Notes:**
- ID is the DRDA number
- Name is the title
- PI is the UM Principal Investigator

2. Enter keyword.

**Tip:** Use a percent sign as a wildcard (%) to specify parts of word. For example, %Review will return all PAFs that are in the states of Unit Review and DRDA Review.

3. Click **Go**.

**Tip:** Click **Advanced** for 2 more filter by criteria.

**Note:** the Filter by function is also available in any role Home Workspace, under any tab as long as at least one PAF/proposal/project is listed.
eResearch Home Workspace

1. Click All PAFs from your Home Workspace.

eResearch All PAFs

2. Click on tab for All Projects (all proposals & active projects) or Closed/Withdrawn/Turned Down PAFs.

Then, follow steps 1 through 3 from the Filter by procedure on page 1.
Topic 4: Create a PAF

Goal/outcome:
Provide hands on practice creating a PAF.

Objectives:
After completing this module, you will be able to:

- Add Key & Administrative Personnel.
  - Locate resources to create eRPM account & friends account.
  - Identify where to find DRDA policy regarding key personnel roles.
- Search for space & add space.
- Complete budget components.
- Attach documents.
  - Locate documents.
  - Upload and change documents.
  - Add document security.
- Use the jump to functionality.
- Check for errors (hide/show errors).

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Create a PAF: Basics

This procedure details how to:

- **Create a PAF:** the fields that must be completed in order to create a PAF.
- **Hide/Show Errors:** the function that allows you to view a list of fields that need to be completed before the PAF can be routed for approval.
- **Route for Approval:** UM Principal Investigator or Primary Research Administrator can send PAF to units for review and approval.

**Important Information**

- Red asterisk (*) indicates a question that must be answered in order to route for approval.
- * Required to Save indicates a question must be completed before you can save and leave the page.
- This procedure focuses on the minimum information needed to create, but not to complete, a PAF. For comprehensive demonstration of PAF completion, launch the PAF online training from the eResearch Training page.

**CREATE A PAF**

Specific fields must be completed in order to create a PAF.

**Home Workspace**

1. Click **Create New PAF** from Home Workspace
New PAF

2. Complete questions 1.1, 1.3, and 1.4.

   **Note:** These questions must be answered to save the page and create the PAF as indicated by *Required to Save.

3. Create the PAF by clicking Save OR clicking Continue to save and move to the next page of the PAF.
4. The PAF is created, and your PAF menu options expand to include:
   - **Save**: Save page
   - **Exit**: Exit PAF Worksheet and returns you to Home Workspace. Prompts you to save page.
   - **Hide/Show Errors**: Validates that all fields required to route for approval are completed.
   - **Print**: Print page of PAF Worksheet.
   - **Jump To**: Can skip directly to pages of PAF Worksheet.

**PAF Worksheet – Jump To**

Jump To allows you to go directly to pages of the PAF Worksheet. It is recommended that you complete the PAF Worksheet in order through the Key Personnel section before starting to use Jump To.
Hide/Show Errors

Use Hide/Show Errors to create a list of fields that need to be completed before the PAF can be routed for approval. If these fields are not completed, you will not be able to route for approval.

**PAF Worksheet – Hide/Show Errors**

1. Click **Hide/Show Errors** to view a list of fields that are required to route for approval that are not completed.
2. Review the **Error/Warning Messages** that appear in red.
3. Click on the **Jump To** link within the **Error/Warning Messages** box to navigate to the page where the error is located.
   
   **Important!** Make sure to save changes made on each page.
4. Click **Refresh** to validate that you fixed errors.
5. Click **Exit** to save your changes and return to the PAF Workspace.

Note: Click **Hide/Show Errors** to turn off the Hide/Show error display (works like a toggle button).
Route for Approval

Before you route for approval, you may want to request that the UM Principal Investigator sign the PAF/Conflict of Interest Statement because many departments will not approve unless the UM PI has signed the PAF/Conflict of Interest Statement.

- Only the UM Principal Investigator or Primary Research Administrator can route for approval.

PAF Workspace

1. Click the Route for Approval activity from the PAF workspace.

Route for Approval activity window

2. Review the displayed Departments. If you notice that a department is not listed that needs to review the PAF, click Cancel and edit the PAF Worksheet.

Note: The departments included are based on your PAF Worksheet entries regarding Personnel, Cost Sharing, Space, Other Commitments, Subproject/Grants, and Administrative Home.

3. Add Comments if desired or required*.
   *If any of the UM PIs have not yet signed the PAF, you are required to enter a comment.

4. Click OK.
PAF Workspace

5. The PAF Workspace now includes the Routing and Approval Status table.

Note: The Primary Research Administrator & UM Principal Investigator are sent an email to confirm that the PAF was routed for approval.

6. **Pending** appears by the department(s) whose turn it is to review the PAF.

Notes:

- The PAF appears in the In Box for Reviewers whose turn it is to review the PAF (Pending).
- An email is sent to the department email contacts when it is a department's turn to review the PAF (Pending).
- Even if it is not a department's turn to review a PAF (Pending), the reviewers from the department will be able to view the PAF in their Upcoming tab.

7. **Approved?** will change from "no" to "yes" when a department approves & the **Date Approved** will display.

8. If your PAF is stuck & you need to follow-up on its review status, click the name of the Department to view contacts for the department that you can call or email to find out more about the status of the department’s review.
Create an eResearch Account

If you cannot find a user in eResearch, you can create an eResearch account. If a person has logged into eResearch previously, he/she will have the PI/Project Team role. If you need to add a person who has never logged in before, you can create an account for:

- **UM Users:** A person associated with UM
- **Non-UM Users:** A person who does not have an affiliation with UM (a friends account will also need to be obtained)

**Important Information**

- eResearch Regulatory Management and Proposal Management Accounts are created separately.

1. You can start the process to create an eResearch account for Proposal Management, by clicking one of the following options:
   - **Create New User** button - from the Home Workspace (PI & Project Team or Reviewer)
   - **Create Account** button from the PAF Worksheet after clicking User not found when adding 2.3 UM Key Personnel or 2.6 Administrative Personnel
   - **Create Account** link from the Unit Liaison Management Department Information page

2. Follow the steps based on if you need to create an account for a UM User or a Non-UM user.
To create an eResearch Account for a person associated/affiliated with UM,

2. Select the search type.
3. Enter the last name or uniqname.
4. Click Search.

Note: After an eResearch account is created, UM students, faculty, staff can login using their uniqname and Kerberos password.

5. Click the uniqname of the person for whom you want to create an eResearch account.
6. The information about the person for whom you want to create an account is displayed.

7. Click **Save** to create the eResearch account for the person.

8. The user was successfully created. Click **OK** to close the success confirmation.

**Note:** You will now be able to find this person in eResearch.
To create an eResearch Account for a person NOT associated/affiliated with UM:

2. Select **Not Currently Associated with UM**
   - **Note:**
     - You may want to first create a friends account. Click on the [Request a Friends Account](http://eresearch.umich.edu) link to do so.
     - For directions on how to create a friends account, see [Obtaining a Friends Account – Step-By-Step Procedure](http://eresearch.umich.edu).

3. Enter the personal information.
   You are required to enter the following to save:
   - **Honorific**
   - **Email Address**
   - **First Name**
   - **Last Name**
   - **Address (Street 1, City, State, Zip County)**

4. Click **Save**.
5. The user was successfully created. Click OK to close the success confirmation.

**Note:** You will now be able to find this person in eResearch.

**Important!**

If the person will need to access to the eResearch system, he/she will need to create a UM Friends Account. This creates an ID to allow non-UM users to login into some UM systems.

He/she must create a UM Friends Account using the same preferred email address that you entered on this page. If the email addresses do not match, he/she will not be able to login to eResearch.

For directions on how to create a friends account, see [Obtaining a Friends Account – Step-By-Step Procedure](http://eresearch.umich.edu).
Obtaining a Friends Account

Non-U-M personnel can obtain access to eResearch by requesting a Friends account. Friends accounts are issued by Information Technology Central Services (ITCS) and allow non-U-M personnel access to many campus systems, including eResearch.

Important Information

You must have a valid email address in order to obtain a Friends account.

2. Click **Login** under Proposal Management.
3. Click **create one now** to create a Friend ID.
4. Click **Others** to view the full directions on How to Set Up a Friends Account.

**Note:** The directions are summarized in the steps below.

5. Go to [https://friend.weblogin.umich.edu/friend/](https://friend.weblogin.umich.edu/friend/)

6. Enter your email address and click **Request**.

7. Review the message sent confirmation screen.

**Notes:**

- An email from [friend-accounts@umich.edu](mailto:friend-accounts@umich.edu) will be sent to the address you entered.
- Allow up to an hour to receive the email.
8. Click the Create Friend Account link in the e-mail from friend-account@umich.edu.

9. Enter your e-mail address.

10. Enter and re-enter your password.

11. Click Set Password.
12. Review your Friend Account Created confirmation.


14. Click Login under Proposal Management.

15. Enter your Login ID (the e-mail you used to request access) and your Password.

16. Click Log In.
17. Enter your contact information, filling in all fields marked with a red star (*).

18. Click Submit.

19. You now have access to eResearch and your Home Workspace is displayed.
Definition of a Principal Investigator

The University research community has an interest in recognizing both the holder of the award with the sponsor and the person serving as institutional oversight (if different). In order to accomplish this, the University research community recognizes two types of eligible Principal Investigators.

Policy

The University recognizes the applicant to the sponsor as the Sponsor Principal Investigator. The institution will allow anyone employed by Michigan who meets the sponsor's guidelines for eligibility to serve in this capacity.

The University will recognize the same individual as the UM Principal Investigator as long as the employment criteria and level of independence associated with the current job title as defined below is met.

If the Sponsor Principal Investigator does not meet the University's criteria for UM Principal Investigator, another individual meeting the requirements is to be named in order to provide internal guidance and leadership for the scientific, technical, administrative, and financial aspects of a sponsored project.

In most cases, the Sponsor-eligible Principal Investigator and UM-eligible Principal Investigator will be the same individual and is to be named in the Principal Investigator field of the Proposal Approval Form (PAF). In cases when an individual does not qualify as both the Sponsor and UM Principal Investigator, both must be named on the PAF.

Additionally, the University will recognize multiple individuals serving as Sponsor or UM Principal Investigators when the sponsor explicitly allows it.

For the purposes of this policy statement, the term Principal Investigator shall encompass other sponsor-specific titles such as Project Director and Program Director that are typically used for non-research sponsored projects.
Definitions

A **Sponsor Principal Investigator** is an employee or student of the University of Michigan who meets the eligibility requirements of the sponsor.

Certain sponsored project competitions are directed specifically to the support of individual students, fellows, or other non-permanent employees. Examples include doctoral dissertation awards and individual pre-and postdoctoral fellowship programs. The proposal format typically requires that the individual applicant (e.g., the student or fellow) be identified in the application as the Principal Investigator.

In these situations, that individual will be identified on the PAF as the Sponsor Principal Investigator. The designation should be used only in these circumstances and requires the designation of a separate UM Principal Investigator on the PAF.

Requests for exceptions to the employee / student requirement can be considered, provided the individual has some other affiliation with the University (e.g., Visiting Scholar) and the unit head for administrative home for the project endorses the request.

The **UM Principal Investigator** is a University of Michigan employee having the background and training in scientific and administrative oversight necessary to conduct and manage a sponsored project. The individual must be treated by the appointing unit as an independent investigator and by the University as a non-temporary employee. The expectation is that eligible UM PIs will submit proposals through their primary appointing unit unless other arrangements have been explicitly approved, by the units involved.

The UM Principal Investigator is considered independent if s/he is a tenure-track faculty (Instructor through Professor), a research faculty (Research Investigator through Research Professor), or holds a Clinical professorial appointment. With unit approval, Emeritus faculty may also be appointed as UM Principal Investigators.

In addition, Archivists, Curators, and Librarians in units that typically use these titles, are eligible to serve as UM Principal Investigators, if approved by the head of the unit.

Regardless of experience and education, Research Associates, Research Assistants, and other staff are not considered to be independent investigators. In general, only on rare occasions will personnel who are not tenure-track or research faculty be permitted to serve as UM Principal Investigators on research projects.

If a UM Principal Investigator leaves the University prior to the end of a sponsored project, leadership arrangements for the duration of the project should be discussed with the unit, DRDA, and the sponsor, in advance of departure.
Exceptions:

Each of the following is an exception to the generally applicable PI eligibility limitations described above. DRDA Project Representatives will review each PI exception request (process described below) and grant approval of the exception on a case-by-case basis. In some situations DRDA will consider the exception only if certain conditions are met:

- Since Lecturers and Visiting and Adjunct appointments are not permanent, Visiting and Adjunct Faculty (instructional and research) will only be permitted to be Principal Investigators if the unit supports the appointment and the individual draws his or her salary through the University (i.e., they must be paid employees). Any request for exception requires a written document from the Dean supporting the PI assignment and explaining why the exception is necessary. The document must accompany each PAF to which the exception applies.
- Heads of non-research and non-teaching units are occasionally permitted to be Principal Investigators on projects considered to be within the scope of their duties.
- Proposals have been processed from individuals who are not permanent or independent but for whom the promotion to an eligible position, prior to award, is assured by the department and the school. This must be noted on the PAF.
- Proposals are routinely processed for individuals who have accepted PI-eligible positions at the University, but who are not yet employees. The expectation is that their University appointment will be effective on or after the proposed effective date of the sponsored project.

Unit Heads are reminded that fiscal and program responsibility for the project may revert to their office if, for any reason, the Principal Investigator is unable to complete the assignment.

Multiple Principal Investigators

Two or more UM Principal Investigators can be designated for a project if the sponsoring agency explicitly permits Multiple Principal Investigators or Co-Principal Investigators. The Multiple/Co-PIs share authority for leading and directing the project, intellectually, logistically, and financially. Each PI is responsible and accountable for the proper conduct of the project, including the submission of all required reports. The designation of Multiple or Co-UM Principal Investigators for a single project diminishes neither the responsibility nor the accountability on any individual PI.

One of the Multiple/Co-UM PIs must be designated as the Contact Principal Investigator.

Other Titles used for UM Key Personnel in the eResearch Proposal Management System

Participating Investigator, With Specified Effort

Refers to other UM investigators a) who contribute in a substantive, measurable way to the
scientific development or execution of the project, b) who generally are PI-eligible under existing UM policies, and c) who have effort specified and quantified in the external proposal, whether or not salaries are requested. The Proposal Approval Form will be routed to the units for these individuals.

**Participating Investigator, Without Specified Effort**
Refers to other UM investigators a) who are involved in the scientific development and execution of the project, and b) who generally are PI-eligible under existing UM policies, but c) who have no specified or quantified effort in the external proposal. The Proposal Approval Form will not be routed to the units for these individuals.
This spreadsheet lists all buildings in the eResearch Proposal Management (eRPM) system as of 3/24/2009. You will find the most up to date information in eRPM. There is a nightly feed from the M-Pathsways Financials system to eResearch Proposal Management system.

If changes are required, please have changes made in M-Pathsways Financials System via the Space Survey or other mechanism.

The list is sorted in alphabetical order by the building name.

**Format of the building name:**
- Building Long Title (building abbreviation)
  - e.g., BAGNOUD FRANCOIS-XAVIER BUILDI (FXB)

**Search Tips:**
- If you want to search by the building abbreviation in eResearch, you must use the wildcard (%).
  - E.g., %FXB% to search for BAGNOUD FRANCOIS-XAVIER BUILDING
- If you do not use the wildcard when searching for building abbreviations, your search will not find any buildings because the system recognizes the parenthesis as part of the abbreviation, e.g., "(FXB)"

<table>
<thead>
<tr>
<th>Building Name</th>
<th>Location</th>
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<tbody>
<tr>
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<td>WILLOW RUN POWERHOUSE (WR PWRHSE)</td>
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<td>WILLOW RUN RADIO TRANSMITTER (WR TRNSMTR)</td>
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<td>WILLOW RUN RECREATION BUILDING (WR RECBLD)</td>
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<td>WILLOW RUN SUPPLY #8 (WR SUPPLY8)</td>
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<td>WOLVERINE TOWER</td>
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<td>WOLVERINE TOWER (WOTO)</td>
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<td>WOMENS HOSPITALS</td>
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<td>WOMENS OFFICE BUILDING (WOMENS)</td>
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<td>WVGR TRANSMITTER BUILDING (WVGR TRANS)</td>
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<td>WYLY HALL (WYLY)</td>
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<td>YOST ICE ARENA (YOST)</td>
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<td>YPSILANTI HEALTH CENTER (YPSI HC)</td>
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</tbody>
</table>
Working with Documents

This procedure details how to:

- **Attach**: Browse and attach documents right from the PAF Worksheet.
- **Upload New Version**: Upload a new version of a document and keep a version history (keeps previous documents).
- **View Version History**: View past versions of documents and revert to previous versions if needed.
- **Delete**: Remove a document. Does not keep any version history.
- **Manage Document Security**: Restrict specified personnel from viewing the document.

**Important Information**

- No limit on the number of documents that can be attached.
- Each document cannot be larger than 150MB.
- Documents can be any file type (e.g., .ppt, .xls, .pdf, .doc).
  - The person viewing the document must have the correct program to view your attachments. For example, if someone does not have Microsoft Project he/she cannot view MS Project files (.mpp).
  - Consider uploading a lower version of file types to ensure everyone can view your document, e.g., upload .doc instead of .docx.
- Mac users: make sure you turn on file extensions. Any file uploaded without an extension (e.g., doc) cannot be viewed by others.

**ATTACH DOCUMENT**

Use to browse and upload/attach documents within the PAF Worksheet.

1. Click **Browse** to locate the document on your computer.
2. Select the file to upload and click **Open**.
3. Optional, enter a title for the document.

4. Select or verify the document **Type**.
   **Note:** Only when uploading Internal Documents will you have a choice of different document types. Otherwise Type matches the section you are completing. E.g., UM Cost Sharing is associated with documents attached in the UM Cost Sharing Section

5. Click Attach.
   **Important!** Your document is not uploaded/attached unless you click attach.

6. Your document is attached and appears as Version 0.01.
   **Note:** You can change the document title at any time, i.e., before or after you attach the document.

### UPLOAD NEW VERSION OF A DOCUMENT

Use to:
- Replace a document with a new version and keep a version history (keeps older versions for later reference)
- Modify document properties (e.g., title)

1. Click **Browse** to locate the new version the document that has already been attached/uploaded.
   **Tip:** Make sure you are on the line for the current document and not the blank line to attach a new document.

2. Select the file to upload and click **Open**.
3. Optional, change the title or enter a title for the document.

4. Verify the document Type.

   **Note:** Only when uploading Internal Documents will you have a choice of different document types. Otherwise Type matches the section you are completing. E.g., UM Cost Sharing is associated with documents attached in the UM Cost Sharing Section.

5. Click **Attach**.

6. Verify the version number change.

   A version number increase signifies that you have attached a new version of the document. (e.g., change from version 0.01 to 0.02)

   **Note:** If you only need to change a document property (Title, Type), you can make the change in the appropriate field. The change will be saved when you **Save** the page or click **Continue** to save and move to the next page.
VIEW DOCUMENT VERSION HISTORY

Use to view past versions of edited documents and revert to previous versions if needed.

1. Click version number (e.g., 0.02) or View Version History button.

2. Click Uploaded File to view different versions of the file.

Notes:
- Each version of the document is listed on its own line.
- If you want to revert to an earlier version of a document:
  o Save the document
  o Upload the document (Follow the directions to Upload a New Version of a Document).

3. Click OK to return to the previous page.

DELETE DOCUMENT

Use to delete a document. Does not keep any version history.

1. Click Delete.

2. Click OK to warning.

3. The document and all previous versions are permanently deleted.
MANAGE DOCUMENT SECURITY

Use to restrict specific personnel from viewing a document attached to a PAF. Any document that is restricted will not be visible to the restricted personnel. You cannot restrict access for UM or Sponsor Principal Investigators (PIs) or the Primary Research Administrator.

1. Click the padlock.

   Note: When the padlock is grey, security has NOT been set on the document.

2. Click the box in front of any name to uncheck the box and restrict access to the document.

   Note: The box will appear greyed out for some people because you cannot restrict document access for:
   - UM Principal Investigators
   - Sponsor Principal Investigators
   - Primary Administrative Contact
   - Primary Post-Award Contact
   - Reviewers for the PAF

3. Click Submit.

4. Document security has been added and the padlock by the document is now gold.

Last updated: 3/12/09

Training Guide Last Updated: 10/01/2009
Goal/outcome:
Discover how to complete a Grants.gov application using eRPM.

Objectives:
By the end of this module, you will be able to:
• Determine if Grants.gov forms are supported in eResearch
• Locate and use the Grants.gov forms in eRPM
• Copy info onto Grants.gov forms
• View Grants.gov workspace
• Identify the steps for validating, performing a submission pre-check and generating the PDF version of the application

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Grants.gov eRPM Steps

1. PAF worksheet – Grants.gov submissions
   – Complete the Grants.gov specific questions
   – Determine if your FOA is supported (all required forms are supported)
   – Give Read & Edit Rights to Grant.gov forms
4. Validate (Required fields validation)
   ! Must be done before can generate PDF!
5. Submission Pre-Check (Grants.gov validation)
7. Finalize Grants.gov forms for DRDA submission.

Step 1 - PAF worksheet – Grants.gov submissions
Step 1 - PAF worksheet – Grants.gov submissions

Look up FOA number to tie Grants.gov forms to PAF

Select Opportunity & continue.
Step 1 - PAF worksheet – Grants.gov submissions

Check if forms supported
Yes = Form Available in eRPM
No = Form Not Available in eRPM

To submit to Grants.gov from eRPM, all required forms must be supported.

Step 1 - PAF worksheet – Grants.gov submissions

Assign Grants.gov/SF424 Edit & Read rights to Key Personnel & Administrative Personnel.
Step 2 – Copy PAF Info to Grants.gov Forms

Copy mapped PAF Info to Grants.gov Forms.

Step 2 – Copy PAF Info to Grants.gov Forms

Click OK to copy mapped PAF Info to Grants.gov Forms.
Step 2 – Copy PAF Info to Grants.gov Forms

Who & when copied logged in Recent Activity

Step 3 – Edit Grants.gov Forms

Click on Grants.gov to access Grants.gov Workspace & Grants.gov forms.
Step 3 – Edit Grants.gov Forms

Breadcrumb allows you to return to PAF Workspace

Select optional forms

Grants.gov Navigation
Step 3 – Edit Grants.gov Forms

Jump To List

Fields Required Save Marked with Red Asterisk *

Step 4 – Validate Submission

Validate Submission checks that all fields required to save are completed.
Step 4 – Validate Submission

Fix any errors & refresh list until successful.

Successful validation. All fields required to Save Completed.
Step 4 – Validate Submission

Status = Valid for Submission
SF-42400000391 for 09-PAF00280

View only
Can reopen & edit, but must Validate again
Logged who & when activity completed

Step 5 – Submission Pre-Check

Status Must Be Valid for Submission
SF-42400000391 for 09-PAF00280

Checks Grants.gov validation rules
Step 5 – Submission Pre-Check - Errors

If errors are returned, re-open the forms for editing, make corrections, re-validate, and then run the “Submission Pre-Check” again.

1. Cannot load schema for the namespace ‘MetaGrantApplication’ - The remote server returned an error (502) Bad Gateway.
2. The MetaGrantApplication/MetaGrantApplication root element is not declared.
3. The Header-V1.0/GrantSubmission/Header element is not declared.
4. Could not find schema information for the attribute ‘Global-V1.0 schemaVersion’.
5. The ‘Global-V1.0/HashValue’ element is not declared.
6. Could not find schema information for the attribute ‘Global-V1.0 hashAlgorithm’.
7. The Header-V1.0/Agency/Name element is not declared.

Step 5 – Submission Pre-Check - Success

If the XML file is valid, double check your sponsor submission instructions to ensure that all sponsor requirements have been met.

E.g., some sponsors require that attached documents (PDFs) must be in a specific order.
Step 6 – Generate PDF

[Image of eResearch Proposal Management interface]

Status = Valid for Submission
SF-42400000391 for 09-PAF00280

Click Generate PDF Version

Select the box to include attachments & click OK.
Step 6 – Generate PDF

Can VIEW PDF from Grants.gov Workspace.

Logs that PDF generated & who generated

Step 6 – Generate PDF

Pages of sample PDF.
Step 6 – Generate PDF

Can access PDF from the PAF Workspace. No need to go to Grants.gov Workspace. Anyone with Grants.gov Read access can view the SF-424 PDF.

Step 7 – Finalize Proposal for DRDA

Click Finalize Proposal for DRDA. Use to notify DRDA that proposal is final & ready for submission.

Grants.gov Application Status Must be Valid for Submission to finalize.
Step 7 – Finalize Proposal for DRDA

Select the box to indicate that your proposal is finalized & ready for submission to Grants.gov.  The Application Status must be Valid for Submission in order to successfully finalize.  Click OK.
This procedure is a supplement to the rest of the materials about completing the PAF. It covers the overall steps you need to complete when working with Grants.gov in eResearch:

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1. PAF WORKSHEET – Grants.gov Submissions

eRPM allows for direct system to system submission for supported Grants.gov opportunities (FOAs).

This section explains how to:

- Select that the proposal is a Grants.gov funding opportunity.
- Select the Grants.gov opportunity.
- Determine if the FOA forms are supported in eResearch.

PAF Worksheet: General Information page

See the Create PAF Basics step-by-step procedure to learn more about the other fields on this page.

1. Click **Yes** (Is this a Grants.gov funding opportunity?).

Notes:

- You must answer question **1.3 Is this a Grants.gov Funding opportunity?** to save. It is marked with **Required to Save.** You will get an error if this is not completed.
- Selecting yes to this question does not require electronic submission. You may still submit via paper.
- If the Grants.gov forms for this opportunity are not yet supported by eResearch, you still have to submit using Adobe or PureEdge.
- By answering yes, you will be directed to Grants.gov specific PAF questions.

2. Click **Continue** to save and move to the next page.
3. Notice that you are on the **Federal Grant Information** page because you selected that this is a Grants.gov opportunity. You will use this page to look up the opportunity.

**Note:** Grants.gov opportunities are downloaded to eResearch on a nightly basis.

4. Enter the **FOA number**.

**Notes:**
- Enter the CDFA Number and/or Competition ID to further refine your search.
- Type the FOA# as specified by the sponsor, using upper and lower case letters, dashes, etc
- If the FOA# unknown, search for it on the Grants.gov website.
- If you use the Grants.gov finder, you must return to eResearch Proposal Management to complete your application.

5. Click **Find**.

6. Select Opportunity Number by clicking the radio button.

**Note:** To view or download instructions for the opportunity in PDF format:
- Right-click or double click on the PDF icon next to the opportunity.
- Select **Save Target As** to save it to your computer.

7. Click **Continue** to save and move to the next page.
8. Notice that the FOA Deadline is filled in from the opportunity chosen in Step 5.
9. Complete the rest of the page using the instructions on the page. See the PAF online course General Information section for more information.
10. Review the FOA Information.
11. Determine if your Required Forms & Optional Forms are supported.

- **Yes** appears for supported forms.
- Supported forms are forms that are available in the eResearch system. Not all Grants.gov forms have been created for eResearch by our vendor Click Commerce. You will find the majority of NIH, NSF & DOD forms in eResearch.
- If any Required forms are NOT supported, you must submit to Grants.gov outside of eRPM.
- If any Optional forms are NOT supported and you are required to use them, you must submit outside of eRPM.
12. Click Continue to save and move to the next page.
13. Complete the rest of the pages of the PAF Worksheet using the instructions on the page. See the PAF online course General Information section for more information.

14. As desired, assign rights to Edit and Read Grants.gov forms to UM Key Personnel.

Note:
- Read permission is required to view SF-424 Summary (either the print version or the PDF version after the PDF version is generated). Accessed from the PAF Workspace.
- Edit rights give access to edit the Grants.Gov Forms. You will see the link from the PAF Workspace.
- When a person does not have any Grants.gov rights, they will not see the Grants.gov links in the PAF Workspace.

15. Click Continue.

If all of your required Grants.gov forms are supported:

You will notice a delay when you Save or click Continue to save and move to the next page after completing the People page.

The reason for this delay is that Grants.gov forms are automatically generated for you behind the scenes.
16. As desired, assign rights to **Edit** and **Read** Grants.gov forms to Administrative Personnel.

**Note:** The same rules apply regarding Read and Edit rights as outlined in Step 14.

17. Click **Exit** to save and return to your PAF Workspace.

18. Notice that a link to the Grants.Gov Forms appears in the PAF Workspace.

⚠️ You have not copied any of the information entered to your PAF Worksheet to the Grants.gov forms yet. This is described in the next section.

**Note:** The link to the Grants.gov forms includes the DRDA number for your proposal (e.g., **09-PAF00280**).
2. Copy PAF Info to Grants.gov Forms

Copying PAF Info to Grants.gov Forms copies some fields entered on the PAF worksheet to the Grants.gov forms. Please note that other fields on the Grants.gov forms are pre-populated with standard information where possible.

**Important!** To take advantage of copying information from the PAF to supported grants.gov forms, complete your PAF before your Grants.gov forms.

- You can copy information from the PAF to Grants.gov forms at any time. You may choose to complete the PAF Worksheet first and check for errors (Hide/Show Errors) before copying information.
- Certain PAF questions are mapped to the Grants.gov forms. Data is transferred only from the PAF to the Grants.gov forms. You cannot copy information from Grants.gov forms back to PAF Worksheet.
- If you make a change to the PAF Worksheet, it is not automatically updated in the Grants.gov forms. You need to use the Copy PAF Info to Grants.gov Forms to update this information. It will not reset your Grants.gov forms, but only update the fields mapped for the PAF.

⚠️ It is not recommended that you edit Grants.gov forms, before copying PAF information. If you do so, you may write over fields that are mapped from the PAF worksheet when you complete the Copy PAF to Grants.gov Form activity.

⚠️ Complete your Grants.gov forms as early as possible.

**PAF Workspace**

1. Click the **Copy PAF to Grants.gov Forms** activity from the PAF Workspace.

**Note:** The activity is used to initially copy and update the Grants.gov form with certain information entered on the PAF Worksheet.
2. The **Copy Info to Grants.gov Forms** window appears.

3. Click **OK** to complete the activity and start your data transfer of fields mapped from the PAF Worksheet to the Grants.gov forms.

**PAF Workspace**

4. The activity **Copy PAF Info to Grants.Gov Forms** is logged in the Recent Activity.

**Note:** Use the **Copy PAF Info to Grants-gov Forms** activity to update the forms whenever the PAF Worksheet is updated with new or modified data.

5. Go to the next section to learn how to complete the Grant.gov forms.
3. Complete Grants.gov Forms

When completing the grants.gov forms, remember to copy information from PAF Worksheet first.

After completing the forms, you will need to:

- Validate (check that all required fields completed)
- Submission Pre-Check (check that you meet the Grants.gov validation rules (Strongly recommended)
- Generate a PDF version to review the information entered (Optional)
- Finalize proposal (Required to let DRDA know that the proposal is ready for submission).

PAF Workspace

1. Click the Grants.Gov Forms link in the PAF Workspace.

   **Note:** As you are completing the Grants.gov forms, individuals with Grant.gov Read can access a printable version from the PAF Workspace, using the Display SF-424 Print Version. After you validate & generate the PDF, the SF-424 PDF is available from the PAF Workspace.

Grants.gov Workspace

2. The Grants.gov workspace appears.
3. You can return to the PAF Workspace by clicking on the PAF name in the breadcrumb navigation.
4. If you have subawards, download the zip file & send to appointees. Instruct appointees to validate the file. Use **Import Subaward** to upload a copy of the PDF. Upload as many times as needed. PDF must have a **Valid for Submission** status in order to be uploaded.
5. Click **Edit Grant Application**... to edit your Grants.gov forms.
Grant Application

6. Notice that the navigation in the Grant Application is very similar to the navigation in the PAF Worksheet. You have the following options:
   a. Back: Return to previous page.
   b. Save: Save page
   c. Exit: Return to Grants.gov workspace
   d. Hide/Show Errors: Check for errors
   e. Print: Print current page.
   g. Continue: Save and move to next page.

Grant Application – Select Optional Forms Page

7. Select any optional forms, you want to include in your applications.

8. Required forms are listed.

9. Click Continue to save and move to the next page.
Grant Application – SF424 R&R Cover Page

10. Notice that fields required to save a page are marked with a red asterisk (*).
   You cannot save a page until all required fields are completed.

11. Use the Jump To list to skip between different pages if you have not completed all required fields on a page.

   Jump To is also a workaround to save a partially completed page. When you use Jump To it will save the fields you have completed even if you have not completed all the required fields on a page.

   You will get an error if you use Save or Continue to save and move to the next page if you have not completed all of the fields marked with a red asterisk (*) on the page.

12. Complete all pages of the Grant Application.

Grants.gov Tips:

- Work similar to Adobe forms.
- Pay to attention to submission instructions.
- Check your zip code.
  Zip codes are pulled from M-Pathways system with a dash, e.g., 12345-6789. Remove the dash to avoid validation errors, e.g., 123456789.
- Indirect calculations do not round to the nearest dollar. Your workaround is to manually adjust. Make sure that your budget information totals correctly. The system will not validate your budget totals.
- Position title pulled from “Primary Work Location” M-Pathways Human Resources Workaround Change this on the Research & Related Senior Key Person (with Expanded) Profile page. (Unless you completed a Sponsor title. Sponsor titles overwrite this field.)
- Budget page heading rows include 2 lines.

13. See the next sections to learn how to:
   Assign Editors & Readers
   Validate your entries
   Submission Pre-Check
   Finalize for DRDA
4. Assign Editors & Readers (Optional)

- Assign editors if you have Reviewers that need to edit the Grants.gov forms. (Must have access to the PAF).
- Assign readers if you have additional individuals who have access to the PAF who need the ability to read the Grants.gov forms (e.g., Ad Hoc Reviewers).

Grants.gov Workspace

1. Click Assign Editors and Readers activity.
2. Click **Add** to assign a **Project Reader** or a **Project Editor**.
3. Select a **Filter By** criteria, e.g., Last Name, User ID (Kerberos ID) & enter search criteria in text box.
4. Click **Go**.
5. Select the checkbox in front person you want to add.
6. Click **OK** to return to the Assign Editors and Readers page.
7. Click **OK** to return to the Grants.gov Workspace.
5. Validate Grants.gov Forms

After completing the forms, you will need to validate (check for errors). You must successfully validate (there are no errors) before you can run the “Submission Pre-Check” activity or create a PDF version.

⚠️ You are performing a level 1 validation. Determines if fields marked with a red asterisk are completed.

⚠️ It is strongly recommended that you always complete Submission Pre-Check (level 2 validation) to check against Grants.gov validation rules. As always, the Sponsor will review the application data in greater detail and validate using their criteria.

⚠️ It is possible to successfully validate within eResearch and have the Sponsor return the application due to errors found during the more intensive validation performed by the Sponsor.

**PAF Workspace**

1. Click the **Grants.Gov Forms link** in the PAF Workspace.

**Grants.gov Workspace**

2. Notice that you are in the Grants.gov Workspace and that the status of your application is **Pre-Submission**.

3. After completing all pages of the grant application, click **Validate Submission** from the Grants.gov Workspace.
Error/Warning Messages

4. If you have errors, the Error/Warning Messages window appears.

5. Review your list of errors (if you have errors).

6. Fix errors, save, and refresh to determine if you have corrected the errors.

7. Revalidate after you have corrected all the errors.
Validate Submission

8. Click OK to validate your submission.

Grants.gov Home Workspace

9. Notice that you are returned to the Grants.gov Workspace and the status of your application has changed to Valid for Submission.

10. Your activity Submission validated is logged in the history. It notes who validated and when it was validated.

11. You no longer have the option to edit the grant application. You can View Grant Application.

12. If you need to make changes, click Reopen for Edit. (You will need to validate again after making changes.)

⚠️ It is strongly recommended that you complete a Submission Pre-Check to validate your data against the Grants.gov validation rules.

⚠️ You must Finalize the proposal before DRDA can submit.
6. Submission Pre-Check

After validating (performing your level 1 error check), you can:

⚠️ Use the PDF Version to review the final application (see next section).

- It is strongly recommended that you complete a Submission Pre-Check to validate your data against the Grants.gov validation rules. You must validate first to transform your data into an XML file that can be read by the Grants.gov validation rules.

### Grants.gov Home Workspace

13. Click **Submission Pre-Check**.

⚠️ You cannot run the Submission Pre-Check until you have successfully validated. The **Application Status** must be **Valid for Submission**.

⚠️ It will take some time to complete this activity because all data entered on the Grants.gov forms is checked against the Grants.gov validation rules.

#### Submission Pre-Check Errors

14. Your eResearch Grants.gov forms have been validated against the Grants.gov validation rules.

15. If errors are returned, re-open the forms for editing, make corrections, re-validate, and then run the “Submission Pre-Check” again.

OR

#### Submission Pre-Check Success

16. If the XML file is valid, double check your sponsor submission instructions to ensure that all sponsor requirements have been met.

   E.g., some sponsors require that attached documents (PDFs) must be in a specific order.

17. Click **OK** to return to the Grants.gov Workspace.
7. Generate PDF Version

After validating (checking for errors):

⚠️ Use the PDF Version to review the final application.

- Generating a PDF will show the PI/Project Team the final application (all information entered on the Grants.gov forms and the attachments), but it does NOT interleaf the attachments in the correct order.
- The PDF version is not what is submitted. The underlying data entered on the forms and attachments is the application information submitted. It will be submitted in the correct order.
- It is recommended to generate a PDF version for review before finalizing the proposal (letting DRDA know that the proposal is ready for submission).

Grants.gov Home Workspace

1. Click Generate PDF Version.  
   ⚠️ You cannot generate a PDF version until you have successfully validated.

2. If you want to include attachments, click the box by Include Attachments.
   **Note:** It takes longer to create a PDF with attachments.

3. Click OK.
4. In the History, Generate PDF version is logged.

5. Click View to review the PDF Version.
Grants.gov Application PDF Version

6. View the PDF of the Grants.gov application.

⚠️ The PDF version of the Grant.gov application is only a Review Tool.

⚠️ When DRDA submits your application to Grants.gov, the actual data you entered on the application and supporting attachments are submitted, not this PDF. It is a system to system transmission of the data you entered.

PAF Workspace

7. After generating the PDF version, you can access it from the PAF Workspace. Under SF-424 Summary, Display SF-424 PDF is available.
8. Finalize Grants.gov forms for DRDA Submission

After completing your Grants.gov application, validating your submission, and generating your SF-424 PDF to review your submission, you are ready to finalize the Grants.gov forms for DRDA submission.

**Important!** Manage Data is not available until you route the proposal for approval. Notice on the screen shot below the Current State of the proposal is Unit Review.

**PAF Workspace**

1. Click **Finalize for Submission to Sponsor** under Manage Data.

   **Note:** This allows you to update/enter information to Finalize the Proposal. You originally saw this page when completing the PAF Worksheet.

Using Finalize Proposal under Manage Data, you do not need to make changes to the PAF Worksheet.

Please wait to Finalize Proposal until you are ready for DRDA to submit.
Finalize for Submission to Sponsor

2. To confirm that your Grant.gov forms in eResearch are ready for submission to the sponsor, click the Finalize box.

Note: To be ready for submission they must be complete and validated successfully (no errors). The state in the Grants.gov workspace is Valid for Submission.

3. Click OK to finalize for DRDA submission.
Goal/outcome:
Understand how to use the post a comment activity and view recent activity history. In class, we will use the Post a Comment activity to request the UM PI to sign the PAF. It can be used anytime you permanently want to attach a comment to a PAF/Project or email a link to the PAF/Project.

Objectives:
After completing this module, you will be able to:
- Post a comment to the entire project
- View activity details

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Post a Comment

Anyone can use the Post a Comment for the Entire Project activity in eResearch Proposal Management to communicate with others involved in the project.

- Comments can be posted during every state and by anyone with access to the project.
- You can select to e-mail individual listed on the PAF Worksheet your comments.

⚠️ Tips for emails from eResearch:
  - Emails sent from eResearch system will have a link to the PAF Workspace. Individuals must login with Kerberos ID & password.
  - Add eresearch@umich.edu to your address book/contacts or safe/trusted senders list so messages are not sent to junk or spam mail.
  - **Plain text email system** users e.g., **Groupwise!**
    - Enable html messages - because eResearch sends html messages. You must view as html to view links to PAFs/proposals, award documents.
    - Forwarding an email breaks links to eResearch system. To view, login to eRPM and find proposal/project/award.
  - **Warning!** Forwarding a message to someone does NOT give them access to view it in eResearch. He/she must be listed on the project or be a Reviewer to have access to view proposal/project/award in eResearch.
  - **Warning!** You cannot copy a link from eResearch and paste it into a web browser. It will not work.

Important Information

- Post a Comment is a communication tool only and will not update or route your PAF for approval.

⚠️ Messages/notes/comments posted are permanent and visible to anyone with access to the PAF.

PAF Workspace

1. Click the **Post a Comment for the Entire Project** activity from the PAF Workspace.
Post a Comment for the Entire Project Window

Two. Enter comments. (Character limit = 2000).

Three. Click Add to upload documents if needed.

Four. Optional, select Email Recipients.

Five. Click OK to post comment to project, send email to selected email recipients and return to the PAF Workspace.

PAF Workspace

Six. Notice that Comment Posted for the Entire Project is logged in the Recent Activity list.

Note: It logs who performed the activity (author) and the activity date time.
The following is an example of an email notification generated by eRPM to alert specified people (selected by the person posting the comment) that a comment was posted. The email subject line is “Post a Comment for the Entire Project Activity”.

**Email Sample**

The following comments have been posted for the PAF referenced below.

**Comments:**
Ready for your signature

**Email Recipients:**
Stephen Forrest

**Posted by:** Jason Johnson

**PAF Information:**
**DRDA Number:** [09-PAF00067](http://eresearch.umich.edu)
**PAF Title:** elwa_Mice Metabolism as a Theoretical Model for Landfill Reduction
**PI:** Stephen Forrest
**Project Administrative Home:** 216100 COE EECS - ECE Division
**Primary Research Administrator:** Jason Johnson

**Direct Sponsor:** Research Institute of Innovative Technology for the Earth
**Sponsor Deadline:** 11/20/2008

[Click here to access the PAF: 09-PAF00087](http://eresearch.umich.edu)

**Questions:**

1. Refer to online help for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

[http://www.eresearch.umich.edu/](http://www.eresearch.umich.edu/)
Goal/outcome:
Familiarize yourself with how the UM PI signs the PAF and Conflict of Interest Statement in order to assist UM PIs that need to sign the PAF Conflict of Interest Statement.

Objectives:
After completing this module, you will be able to:

- Identify the process used for the UM PI to sign the PAF.
- Recognize that a PI can change the Conflict of Interest after initially signing it.

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View and Print a PAF Summary

The PAF summary is a non-editable, printable view for review of all information entered on the PAF Worksheet. Edits are made using Edit PAF Worksheet view.

The PAF Summary includes:

- All information entered on the PAF worksheet
- All attached/uploaded documents (including supporting documents & final proposal documents)
- PI/ Conflict of Interest Statement Signatures
- Unit Approval Signatures
- DRDA Approval Signature
- Routing and Submission Information

Certain actions can be completed from the PAF Summary based on your role.

- UM Principal Investigator can sign PAF/Conflict of Interest Statement from PAF Summary.
- Reviewers can Request Changes or Unit Approve from the PAF Summary.

PAF Workspace

1. From the PAF Workspace, click Display PAF Summary.
2. View the PAF Summary.

3. When are finished viewing the PAF Summary, click **OK** to return to the PAF Workspace.

4. If you want to print, click **Print** to display print preview.

5. Click **Print**.

6. Select Print Options and click **Print**.
PI Sign PAF Conflict of Interest

The PI can elect to sign the PAF using 2 methods:
1. Sign PAF activity in the PAF Workspace
2. Sign PAF in the PAF Summary (PAF Workspace->Display PAF Summary->click Sign PAF)

This document is broken into five sections:
I. Login to eResearch Proposal Management
II. Home Workspace
III. PAF Workspace
IV. Sign PAF from PAF Workspace
V. Sign PAF from PAF Summary

I. Login to eResearch Proposal Management

eResearch Home Page

1. Go to http://eresearch.umich.edu/.
2. Click Login under Proposal Management.

Important!
If you are using eResearch Proposal Management as part of the pilot (before March 2009 all campus release), to login go to: http://www.umich.edu/~eresinfo/erpm/pilot.html

UM Authentication Required Page

3. Enter your Login ID (uniqname or Friend ID) and your Password.

Notes:
• An MToken is not required to use eResearch.
• If you are a non-UM user, refer to the Obtaining a Friends Account Step–By-Step Procedure for more information.

4. Click Login.

Important!
The UM Principal Investigator logging in here authenticates him-/herself as the user.
This will allow the PI to electronically sign the Conflict Interest Statement and the PAF.
5. The first time you login to eResearch you will be prompted to verify your contact information.

Enter your contact information, filling in all fields marked with a red asterisk (*).

**Notes:**
Your address is populated from your office address from the M-Pathways Human Resources system.

To change your work address:
Complete the Address/Personal Data Form (30005) and return it to the Human Resource Records Office and they will update the address in the hr address data base.

[http://www.hr.umich.edu/hrris/forms/pdfs/Addr-PersData2.pdf](http://www.hr.umich.edu/hrris/forms/pdfs/Addr-PersData2.pdf)

You can only have one address in eResearch.

Your address will be maintained automatically for you. The eResearch system has a nightly feed from the M-Paths system to update addresses.

6. Click **Submit**.
II. Home Workspace

Home Workspace for PI

7. eResearch Proposal Management opens and displays your Home Workspace.

8. The PAF that needs to be signed appears in:
   - PAFs with Required Action
   - PAFs Not Yet Signed by PI
     because it is still being worked on and has not been signed by the UM Principal Investigator (PI) yet.

Note:

- **PAFs with Required Action** - Displays all PAFs that you need to do something with (e.g., completing PAF, make changes & submit changes, route for approval, etc.)
- **PAFs Not Yet Signed by PI** - Displays all PAFs that have not yet been signed by UM PI. PAF can appear in both PAFs with Required Action & PAFs Not Yet Signed by PI. Use this to quickly find a list of PAFs where UM PI still needs to sign PAF/Conflict of Interest Statement.

9. Click on the PAF from either section (since it appears in two places) to access the PAF Home Workspace in order to sign PAF/Conflict of Interest Statement.
III. PAF Workspace

10. The PAF Home Workspace appears. It allows you to:
   a. View information regarding the PAF (e.g., basic information, reviewers, activity history, comments, etc.)
   b. View Current State of PAF/proposal. E.g., Proposal Preparation (still being completed), Unit Review (being reviewed by unit), DRDA Review, etc.
   c. Complete activities related to the PAF/proposal (e.g., Edit PAF Worksheet, Sign PAF, Route for Approval, etc.).

IV. Sign PAF Activity

11. To sign the PAF, click **Sign PAF** under activities.
12. The Sign PAF window appears.
13. Read the Conflict of Interest Statement and answer the question below.
14. If needed, enter Comments.

Important! Comments are required if you answer Yes to the Conflict of Interest question.

15. Read the Sign PAF statement.
16. Scroll down the page.

17. Select the Sign the PAF and Conflict of Interest Statement box to electronically sign the PAF.
18. Click OK to complete your electronic signature of the Conflict of Interest Statement and the PAF.

19. You have electronically signed the PAF and are returned to the PAF Workspace.
20. PAF Signed line has been added to the Recent Activity
21. PI who signed the PAF, e.g., Stephen Forrest, is the Author
22. When the PAF was signed is the Activity Date
23. You can at any time go back and use the Change Conflict of Interest activity to make changes to your conflict of interest.
24. Click My Home to return to your Home Workspace and view that this PAF no longer appears in the PAFs Not Yet Signed by PI section.
25. Notice that PAF appears in the **PAFs with Required Action** because it is still being worked on.

26. It no longer appears in **PAFs Not Yet Signed by PI** because the PI signed the PAF.

27. To sign the PAF from the PAF Summary, click **Display PAF Summary** under PAF Summary.
28. The PAF Summary is displayed. It is a printer friendly version of the PAF.

**Note:** The PAF Summary contains:
- All information entered on the PAF worksheet
- All attached/uploaded documents (including supporting documents & final proposal documents)
- PI/Co-I Signatures
- Unit Approval Signatures
- DRDA Approval Signature
- Routing and Submission Information

29. Scroll down the page until you find the PI signatures.

30. Click **Sign PAF**.

31. Follow steps 12-18 above to sign the PAF.

32. Click **OK** to return to the PAF Workspace.

33. Follow steps 19-25 above to see how you can view that the PAF was signed in the PAF Workspace & Home Workspace.
Topic 8: Route for Approval

Goal/outcome:
Complete the route for approval activities.

Objectives:
After completing this module, you will be able to:

- Identify that only the UM PI or Primary Research Administrator can route a PAF for approval.
- Route a PAF for approval.
- Understand the Routing Table.
- Identify how a PAF gets to the appropriate Reviewers.
- Discover what to do when a PAF gets “stuck.”

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PAF Routed for Unit Review Email

The following is an example of an email notification generated by eRPM to alert the Primary Research Administrator and the UM Principle Investigator that a PAF has routed for unit review.

The email subject line is “PAF Routed for Unit Review”.

Email Sample

This is for information only. No action required.

The PAF referenced below was routed for review and approval.
You will be notified when further action is required.

Comments:

PAF Information:
DRDA Number: 09-PAF00085
PAF Title: _Hummingbird Metabolism as a Theoretical Model for Landfill Reduction
PI: Stephen Forrest
Project Administrative Home: School of Social Work
Primary Research Administrator: Jason Johnson

Routed for Unit Review & Approval: 11/14/2008 11:35 AM
Direct Sponsor: Research Institute of Innovative Technology for the Earth
Sponsor Deadline: 11/20/2008

Action Required:
1. Click here to access the PAF: 09-PAF00085
You may be prompted to login using your uniqname and Kerberos password.
2. Click View PAF Summary to review PAF contents and supporting documents.
3. After review of PAF and proposal, click Unit Approve or Reviewer Request Changes.

Recipients:
This message was sent to the following:
Jason Johnson
Stephen Forrest

Questions:

1. Refer to online help for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.
http://www.eresearch.umich.edu/
Topic 9: Making Changes to the PAF After Routed

**Goal/outcome:**
Make & submit changes to PAF worksheet after it is routed for approval and understand the change log and change tracking process.

**Objectives:**
After completing this module, you will be able to:

- Make and submit changes to the PAF Worksheet as the Project Team/PI.
  - Identify that only the UM PI or Primary Research Administrator can submit changes.
- Track changes made in Recent Activity.
- View change details in change logs.

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This procedure details how the PI & Project Team can:

- **Make and submit PAF changes.** Page 2
- **Decline requested PAF changes.** Page 7
- **Request DRDA Action to make changes.** Page 9

### Important Information

- Before a PAF is routed for approval, the PI & Project Team can make changes at will/freely because it is still being prepared. After the PAF is routed for approval, there are processes in place to make and submit changes. These changes are tracked in the eRPM system.
- Although changes are tracked in eResearch, it is REQUIRED to use the comments to summarize the changes made.
- eResearch allows Reviewers to make changes. If a Reviewer is making a change, it locks the PI & Project Team & other departments from making changes. If a Reviewer submits a change, the UM Principal Investigator & Primary Research Administrator will receive an email.
- The PI or Project Team, may need to change a PAF for a variety of reasons. How a PI or Project Team member can make these changes depends on the PAF’s State (where it is in the process) & the situation. See table below for when to use the various activities.

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<tr>
<td>Project Team Make Changes</td>
<td>• PAF has been routed for unit approval (Unit Review state) and PI &amp; Project wants to make a change(s).</td>
<td>• Anyone with PAF Edit Rights</td>
</tr>
</tbody>
</table>
| Project Team Submit Changes | • Need to submit changes made by Project Team.  
• Need to submit changes that were made per a request for a change from Unit or DRDA. | • Primary Research Administrator or UM PI |
| Project Team Decline Changes | • Unit or DRDA requested change and PI & Project Team does not agree with requested change.  
• May also be used to decline post-submission changes. | • Primary Research Administrator or UM PI |
| Project Team Request DRDA Action | • DRDA Review states – PAF has been approved by all units and is being reviewed by DRDA  
• Submitted to Sponsor state – Proposal has been reviewed by DRDA & Submitted Sponsor. Sponsor may contact PI to make changes.  
• Negotiation state – Proposal is in negotiation. Sponsor may contact PI to make changes.  
• Active – Project is active. Project Team may need to alert DRDA of upcoming award change. | • Anyone with PAF Edit Rights |
MAKE AND SUBMIT CHANGES

Use this when:

- PAF has been routed for unit approval (Unit Review state) and PI & Project wants to make change(s).
- Received a request for a change from Unit or DRDA and PI & Project needs to make change(s).

When either a Unit or DRDA requests a change:

- UM PI & Primary Research Administrator will receive an email.
- PAF will become editable again.
  - Appears in Home Workspace Inbox in PAFs with Required Action section.
  - Has one of the following states (depending on who requested change):
    - Unit Review - Project Team Making Changes.
    - DRDA Review - Project Team Making Changes.

PAF Workspace

1. If a Unit or DRDA requested changes, skip to step 5.
   Notice the PAF is in Unit Review and cannot be edited. View PAF Worksheet appears instead of Edit PAF Worksheet.
2. Click Project Team Make Changes activity from the PAF Workspace.

---

1. If a Unit or DRDA requested changes, skip to step 5.
   Notice the PAF is in Unit Review and cannot be edited. View PAF Worksheet appears instead of Edit PAF Worksheet.
2. Click Project Team Make Changes activity from the PAF Workspace.
3. Optional, enter Comments.

4. Click OK.

5. Notice that Project Team Making Changes is logged in the Recent Activity list.
   
   Note: It logs who performed the activity (author) and the activity date time.

   Note: If you received a change request from a unit or DRDA, this request would be logged in Recent Activity.

6. Notice that the state of the PAF is Unit Review – Project Team Making Changes.

   Note: When the state of the PAF is Unit Review – Project Team Making Changes it disappears from the inbox of reviewers whose turn it is to review the PAF (Pending) because changes need to be made by the Project Team. If these Reviewers need to view the PAF, they will always be able to see it using All PAFs.

   If you received a change request from DRDA the state of the PAF is DRDA Review – Project Team Making Changes.

7. Click Edit PAF Worksheet, to go and make changes.
8. Make the needed changes in the PAF Worksheet.
   
   **Tip:** Use the Jump To list to go directly to the page where you need to make a change.

   **Note:** Anyone with edit access to the PAF can make changes while it is open for editing.

   **Warning!**
   If two people are editing the same page at the same time, the last person to save, SAVES the page. The other person’s information is overwritten. Be sure to communicate with your collaborators when making edits.

9. Save your changes.

10. Click Exit to return to the PAF Workspace.

11. Click **Project Team Submit Changes** activity from the PAF Workspace.

**Important!**

- Only the UM PI or Primary Research Administrator can submit changes.
- Changes will not be written to the PAF & viewed by Reviewers & DRDA until they are submitted.
12. If a department requested a change, the list of departments who are reviewing the PAF appear. Select the department(s) for which you have made changes.

13. Select a **Change Type**.

   **Options include:**
   - Budget or Budget Justification
   - Cost Sharing
   - Key Personnel
   - Space Resources
   - Typos
   - Research
   - Other
   - No Changes Made

   **Tips:**
   - If you decide that changes are not needed, use **No Changes Made** as the Change Type.
   - If you change key personnel, make sure you verify your Administrative Home, Space for Key Personnel, & Project Personnel Details.

14. **Required**

   Enter **Comments** that summarize the change made.

   **Note:** The change log tracks all changes made with a line for each page, but it is not convenient for quick review.

15. Click **OK**.
16. Notice that **Project Team Submitted Changes** is logged in the Recent Activity list.  
   **Note:** It logs your comment, who performed the activity (author) and the activity date time.

17. Notice that the state of the PAF changed to **Unit Review**.  
   **Note:** If you received a change request from DRDA the state of the PAF would return to **DRDA Review**.

18. Notice that you cannot edit the PAF.  **View PAF Worksheet** appears.
DECLINE REQUESTED CHANGES

Only the Primary Research Administrator or UM PI can decline request changes.

Use this when:
- Unit or DRDA requested change and PI & Project Team does not agree with requested change.
- May also be used to decline post-submission changes.

When either a Unit or the DRDA requests a change:
- PI & Project Team will receive an email.
- PAF will become editable again. Returns to either:
  - Unit Review - Project Team Making Changes.
  - DRDA Review - Project Team Making Changes.

PI & Project Team Home Workspace

1. Click on the PAF from your Home Workspace.
   Note the state of the PAF is either:
   - Unit Review - Project Team Making Changes.
   - DRDA Review - Project Team Making Changes.

PAF Workspace

2. Click Project Team Decline Requested Changes activity from the PAF Workspace.
Decline Requested Changes activity window

You are about to decline a request for an expedited submission of this PAF. Use the text box below to log any comments and the upload area to upload any relevant documents. Click OK to save your changes. Click CANCEL to cancel this activity.

3. Select the Departments whose requests you are declining.

4. Strongly recommended, enter **Comments** explaining why you are declining to make changes.

5. Click **OK**.
REQUEST DRDA ACTION

Anyone with access to edit that PAF can request DRDA Action.

Use this when in the state of:
- DRDA Review – PAF has been approved by all units and is being reviewed by DRDA
- Submitted to Sponsor – Proposal has been reviewed by DRDA & Submitted Sponsor. Sponsor may contact PI to make changes.
- Negotiation – Proposal is in negotiation. Sponsor may contact PI to make changes.
- Active – Project is active. Project Team may need to alert DRDA of upcoming award change.

PAF Workspace

1. Notice the state of the PAF. It could be:
   - DRDA Review
   - Submitted to Sponsor
   - Negotiation

2. Notice that the PAF cannot be edited. View PAF Worksheet appears.

3. Click Project Team Request Changes activity from PAF Workspace.
Project Team Request DRDA Action Window

4. Enter **Comments** that explain that you want to:
   - Request that DRDA edit the PAF
   - Enable the project team to edit the PAF
   - Have DRDA cancel the PAF

**Important!**
Do not use this activity to indicate finalization of the proposal document or communicate submission instructions to DRDA.

5. Click **OK**.

**Note:** Requesting to make a change does not automatically allow a project team to make changes (i.e., does not put the PAF into an editable state). The request must be approved by DRDA.
If DRDA approves, you will be able to make changes to the PAF.
When a change is made to a PAF or its attached documents (in any state except Proposal Preparation), the details of the change are recorded and made available in a change log. A separate change log is created for each change made.

The change log contains:

- Name of person who made the change (change author)
- Content or type of change
- Time and date of change

**PAF Workspace Change Tracking Tab**

1. From the PAF Workspace, click on the Change Tracking tab.
2. View each change made (Activity) in its own change log line.
   
   **Note:** When making changes, changes made to different pages are logged in different change log lines.
3. View the name of person who made the change (Author).
4. View the time and date of change (Activity Date).
5. To view the details of a change, click Change Log.
6. Review the Activity Details (Change Log). Displayed you will see:
   - **Author** - name of the person who submitted the change.
   - **For Person** – Ignore this field.
   - **Logged for (PAF)** - PAF Project Title (as entered in section 1.1 of the PAF worksheet).
   - **Activity Date** - time and date that the author submitted the change.

7. To determine the changes made, compare the items in the **Old Value** column against those in the **New Value** column on the **Property Changes** tab.

   In the example shown, the **PAF.name** changed from “Color Elasticity: Blue’s Flexibility Qualities?” to “Color Elasticity: Fuchsia Flexibility Qualities?”

   The use of **strike through text** for the previous value and **highlighted text** for the new value provides assistance in identifying the content of the change.

   If the change adds a value where none existed previously, the **Old Value** column will be blank and the **New Value** will contain highlighted information.

   **Note:** Ignore the **Change Log Documents/Tasks/Notifications** tab.

8. Click the **name of the PAF** in the breadcrumb navigation to return to the PAF Workspace.
The following is an example of an email notification generated by eRPM to alert PAF Email Notification contact persons in the Units who have already submitted approval that changes were made to a PAF.

Email Sample

This is for information only. No action required.

The Project Team has made changes to the PAF referenced below. You will be notified if further action is required.

Comments:
I've attached the cost share approval

PAF Information:
DRDA Number: 09-PAF00084
PAF Title: Iforsyth Mice Metabolism as a Theoretical Model for Landfill Reduction
PI: Stephen Forrest
Project Administrative Home: 216100 COE EECS - ECE Division
Primary Research Administrator: Jason Johnson

Routed for Unit Review & Approval: 11/14/2008
Direct Sponsor: Research Institute of Innovative Technology for the Earth
Sponsor Deadline: 11/20/2008

Click here to access the PAF: 09-PAF00084

Recipients
This message was sent to the following:

Arnold Approver

Questions:

1. Refer to online help for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

http://www.eresearch.umich.edu/
Topic 10: Manage Data

Goal/outcome:
Make changes to certain data elements without “unlocking” the PAF worksheet.

Objectives:
After completing this module, you will be able to:

- Identify who can perform the various Manage Data activities.
- Update administrative personnel information using Manage Data.
- Update submission instructions.
- Update Primary Research Administrator.
- Understand where to find how to Relate PAFs.
- Understand where to find Finalize Proposal for Submission to Sponsor.

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When a PAF is routed for approval, it is put into a non-editable state. There are certain types of data that can be changed without putting the PAF Worksheet into an editable state & creating change logs using Manage Data.

**Note:** Directions on how to use Related PAFs & Finalize for Submission to Sponsor are covered in their own procedures. See the eRPM training page: [http://www.umich.edu/~eresinfo/erpm/training.html](http://www.umich.edu/~eresinfo/erpm/training.html).

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**PAF Workspace**

1. Click on one of the **Manage Data** views from the PAF Workspace.

Notice that the PAF cannot be edited and the worksheet can only be viewed.
CHANGE PRIMARY RESEARCH ADMINISTRATOR

Who Can Change Primary Research Administrator: Administrative or Key Personnel who have rights to edit a PAF.

The Primary Research Administrator is initially identified during Proposal Preparation. This person receives email notifications and has the ability to route the PAF for approval. There may be occasions when another person needs to take the role of primary research administrator on the PAF.

Once a PAF has moved into the state of Unit Review, the primary research administrator can be changed to anyone currently listed as administrative personnel without making changes to the PAF worksheet.

Note: You may add additional administrative personnel using the Manage Administrative Personnel procedure on page 4 of this document.

Change Primary Research Administrator page

1. Select Primary Administrative Contact.
2. Select Primary Post-Award Contact.
3. Click OK to save and return to the PAF Workspace. Clicking Apply saves your changes without closing the page.

Note: Use the Jump To menu to move to other Manage Data views.
MANAGE ADMINISTRATIVE PERSONNEL

Who Can Manage Administrative Personnel:
- Administrative or Key Personnel who have rights to edit a PAF
- Reviewers from the PAF’s Administrative Home

Administrative Personnel are initially entered during Proposal Preparation. Once a PAF has moved into the state of Unit Review, administrative personnel can be added, deleted and edit rights managed without making changes to the PAF worksheet.

Administrative Personnel page

1. Click Add.

2. Enter last name or uniqname.

3. Click Find.

4. Select person from the list.

5. Select Award Type and Edit Rights.

6. Click Save.

7. Click OK to save and return to the PAF Workspace. Clicking Apply saves your changes without closing the page.

Note: Use the Jump To menu to move to other Manage Data views
SUBMISSION INSTRUCTIONS

Who Can Change Submission Instructions: Primary Research Administrator or UM PI

Submission instructions are initially entered during Proposal Preparation. Once a PAF has moved into the state of Unit Review, submission instructions can be managed without making changes to the PAF worksheet. It is important to keep your submission instructions up to date in order to facilitate a timely submission.

Submission Instructions

1. Select all Proposal Submission options.
   - This information assists DRDA in processing your proposal.
   - Do not select both eResearch submission to Grants.gov & Adobe Submission to Grants.gov.
     - eResearch submission to Grants.gov is only used when your Grants.gov forms are supported by eResearch
     - Adobe Submission to Grants.gov is only used when your Grants.gov forms are NOT supported by eResearch & you must use Adobe to submit to Grants.gov.

2. Update the Will DRDA Submit this proposal question.

3. Enter Notes for DRDA.
   - Describe your submission method if you select Other.
   - Include the proposal delivery/routing contact & contact information (address, fax number, email, etc.).
   - Include any additional information for DRDA, such as:
     - Whether an institutional (cover) letter is required; DRDA Signature is required; DRDA should provide contract
     - Indicate if this project is being proposed under a special program type, e.g. SBIR, STTR, etc.
     - Specify if these notes are award related and not related to final proposal submission to sponsor.

4. Click OK to save and return to the PAF Workspace. Clicking Apply saves your changes without closing the page.

Note: Use the Jump To menu to move to other Manage Data views
Relate PAFs

This procedure details how to relate two PAFs together. Before you begin, you need to locate the PAF you want to relate.

Who Can Relate PAF: Anyone with the PI & Project Team or Reviewer role with access to a PAF can relate PAFs.

Important Information

- Relate PAFs in any state.
- Relating PAFs is mainly used for reporting purposes from the eRPM data set.
- View only PAF relationships from eRPM data or specific PAFs.
- Need access to both PAFs to see the relationships from both the original PAF & its related PAF.

PAF Workspace

1. Click the Relate PAFs activity from the PAF Workspace.

2. Click Add to relate a PAF to the current PAF selected.
3. Current PAF number appears.

4. Select Relationship for Current PAF.

5. Select Related Relationship for PAF you want to relate to the original PAF.

**Important!**
What you can select depends on the Relationship selected for the Current PAF.

Relationship options include:

- **Competitive Continuation/Renewal**
  - An application for sponsor consideration to continue a currently active or previously funded project (by that same sponsor).
  - Example: Sponsor awarded funding for a five-year project. PI wishes to apply for funding to continue funding for an additional five years.
  - This second application would be considered a Continuation or Renewal.

- **Full Proposal**
  - An application that is being submitted in response to a sponsor invitation following submission and review of a pre-proposal/pre-application to the sponsor.
  - Must be related to a Pre-Proposal PAF.

- **Increment**
  - An application submitted to sponsor in order to receive continuation of funding.
  - This does not undergo a competitive review process from the sponsor but does require a new PAF.

- **Main**
  - The original PAF that needs another PAF related to it.

- **Other**
  - Create your own relationship to another PAF.
  - In the Notes for Current PAF field, specify the relationship.
  - Creates a reciprocal relationship with the other PAF, but does not fill in the “Notes for Current PAF” on the related PAF.

- **Pre-Proposal**
  - Application submitted to a sponsor that includes a brief summary of the project, personnel, and budget.
  - After review, some applicants are invited to submit complete, formal applications.
  - Must be related to a Full Proposal PAF.

- **Project**
  - An application submitted to a sponsor that fits under an Umbrella Agreement.
  - Must be related to an Umbrella PAF.

- **Resubmission**
  - An application that is being revised and submitted again for review by the same sponsor, typically altered in response to reviewer critiques of a previous submission of the application.
  - Implies the sponsor made a final decision not to fund the previous version.

- **Supplement**
  - An application for additional funding to supplement a currently funded project (same sponsor).
  - The request may cover additional work or simply increased costs of the existing project.

- **Umbrella Agreement**
  - An application that contains other projects or tasks within it.
  - Must be used with a Project PAF.
Manage Related PAFs

6. Select PAF to relate to.

Find Related PAF Window

7. Enter search criteria to find the PAF to relate to. Options include:
   - Project Grant
   - Title
   - PI Last Name
   - PI First Name
   - DRDA #.

8. Click Find.

9. Select PAF to relate to.

10. Click OK to return to Manage Related PAFs.
11. Enter **Notes For Current PAF** if you select **Other** as a relationship.

12. Click **Save**.

13. Click **OK** to relate the PAFs together.

14. You can view the related PAF information from either the original PAF or the related to PAF. Click on **Related PAFs** from the PAF Workspace. This information is sent to the eRPM data set also.
Topic 11: Finalizing the Proposal

Goal/outcome:
Learn how to upload the final proposal documents and understand the importance of this function.

Objectives:
After completing this module, you will be able to:

- Articulate the importance of uploading 1 PDF as the final proposal document for submission to the sponsor.
- Complete steps to finalize the proposal for DRDA, when Submission method is:
  - Adobe submission to Grants.gov
  - Email to Sponsor
  - Commercial Courier to Sponsor (FedEx, UPS, etc.)
  - US Mail to Sponsor
  - Fax to Sponsor
  - Other
- Complete steps to finalize the proposal for DRDA, when Submission method is eResearch submission to Grants.gov
  - Understand that one select submission method eResearch submission to Grants.gov will check the status of Grants.gov forms in eResearch when finalizing.
  - Understand that Grants.gov forms in eRPM must be validated prior to finalization.
  - Understand that if Grants.gov forms are not supported in eResearch do not select eResearch submission to Grants.gov as a submission method because it will prevent finalization. Your submission method should be Adobe submission to Grants.gov.
- Complete steps to finalize the proposal for DRDA, when Submission method is Other Online System (e.g. Fastlane, proposalCENTRAL)
- Identify next steps when PAF is in the State DRDA Approved – Awaiting Finalization
- Identify that DRDA cannot submit a proposal until it has been finalized.

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Finalize Proposal in eRPM

- The business practice allows a PI to complete his/her proposal while the PAF is being routed for approval.
- Steps have been included in eRPM to accommodate this process.
- PAF can still be routed concurrent with or before the proposal completion process.
- Finalize proposal steps are designed to make it clear:
  - When the proposal document is finalized and ready for submission.
  - Who is expected to submit the proposal.
  - A common location for the final proposal document.

Submission Methods & Uploading Final Proposal Documents

- Submission Methods are indicated on the PAF Worksheet & can be changed using Submission Methods activity.
- The process for uploading final proposal documents is impacted by the Submission Method selected. Methods include:
  - eResearch submission to Grants.gov
  - Adobe submission to Grants.gov
  - Email to Sponsor
  - Other Online System (e.g. Fastlane, proposalCENTRAL)
  - Commercial Courier to Sponsor (FedEx, UPS, etc.)
  - US Mail to Sponsor
  - Fax to Sponsor
  - Other
Upload Final Proposal Documents – PAF Worksheet

- **PAF Worksheet** - PI/Project Team can indicate that the final proposal document is ready when completing the PAF.
  - Answer Yes to question 5.17 & complete 6.1 Final Documents for Submission on the Proposal Documents page.

1. In 6.1 Final Documents for Submission, attach 1 PDF of FINAL sponsor-required documents.
   - For Non-Federal Direct Sponsor, the PDF should include:
     - Statement of Work/Abstract
     - Budget
     - Budget Justification
   - For Federal Direct Sponsor, attach 1 PDF.
     - Grants.gov via Adobe - Attach 1 PDF.
     - Grants.Gov in eResearch, do not attach a document, but the Grants.gov application must be validated.

- **Important!** Do NOT upload internal review documents in 6.1.
Finalize – PAF Worksheet (cont)


- For a Federal Direct Sponsor, attach DRDA Administrative Shell which includes:
  - Sponsor Forms
  - Budget
  - Budget Justification
  - Abstract or Draft of Proposal Text
- For Non-Federal Direct Sponsor, attach Draft Contract, Internal Budgets, Other draft documents
- **Important!** Do NOT upload the Final Proposal documents here.

Finalize for Submission to Sponsor

**Finalize for Submission for Sponsor** activity is used by PI/Project Team to finalize after the PAF routed is for approval.

Steps cover finalization for the following Submission Methods:

- Adobe submission to Grants.gov
- Email to Sponsor
- Commercial Courier to Sponsor (FedEx, UPS, etc.)
- US Mail to Sponsor
- Fax to Sponsor
- Other

1. Click **Finalize for Submission to Sponsor** activity.
Finalize for Submission to Sponsor (cont)

2. Indicate that the proposal document is final & ready to be submitted to the sponsor.

3. Upload 1 PDF for submission to the sponsor.

   **For Federal Direct Sponsor:**
   - Attach 1 PDF.
   - Attach 1 PDF for Grants.gov via Adobe submission.
   - No need to attach PDF for Grants.gov via eResearch.

   **For Non-Federal Direct Sponsor:**
   Attach 1 PDF that includes:
   - Statement of Work, Abstract, etc.
   - Budget
   - Budget Justification

4. Click OK.
1. Validate Grants.gov submission
   - Application Status = “Valid for Submission”
   - Directions: http://www.umich.edu/~eresinfo/erpm/docs/PM_GrantsGov.pdf

2. Finalize for Submission to Sponsor.

3. No need to upload a PDF in 6.1 Final Documents for Submission.
   - An error will occur if the Grants.gov application is not valid for submission.

1. Complete the proposal on the sponsor system.

2. Finalize for Submission to Sponsor.

3. Indicate that the proposal has been uploaded to sponsor system.
**DRDA Approved: Awaiting Final Proposal**

- DRDA completes PAF Review
- Submission Instructions indicate that DRDA will submit the proposal
- If the proposal documents are not finalized
  - DRDA will send the PAF back to the PI & Project Team for proposal finalization
  - PI & Primary Research Administrator will receive an email
  - The PAF will be in the state: DRDA Approved: Awaiting Final Proposal

**Project Team Submission to Sponsor**

- DRDA completes PAF Review
- Submission instructions indicate that the Project Team will submit the proposal, DRDA sends to:
  - PI & Primary Research Administrator (sent an email)
  - The PAF will be in the state: Project Team Submission to Sponsor
- PI & Project Team must:
  - Must Finalize Proposal Documents
  - Log Project Team Submission to Sponsor
- Directions:
  [http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_LogSubmission_SS.pdf](http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_LogSubmission_SS.pdf)
Proposal document must be finalized before:
- DRDA can submit to sponsor
  or
- Project Team Can Log Sponsor Submission

After a PAF is routed for approval, a message on the PAF workspace indicates if:
- is Finalized
  or
- is Not Finalized

Need more detailed directions?

See:
http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_Finalize.pdf
Finalize for Submission to Sponsor

This document explains how to finalize for submission to sponsor in eResearch Proposal Management.

- The business practice allows a PI to complete his/her proposal while the PAF is being routed for approval.
- The proposal does not have to be finalized before the PAF is routed for review & approval.
- PAF can still be routed concurrent with or before the proposal completion process.
- Finalize proposal steps are designed to make it clear:
  - When the proposal document is finalized and ready for submission.
  - Who is expected to submit the final proposal document.
  - A common location for the final proposal document (sponsor required documents).

Who Can Finalize: Key & Administrative Personnel with edit rights can finalize for submission to sponsor.

Important Information

⚠️ DRDA will not submit a proposal to a Sponsor until it has been finalized.

⚠️ If the project team is submitting the proposal, the project team cannot log project submission until the proposal is finalized for the sponsor.

⚠️ All finalized proposals appear in the Finalized Proposals tab of your Home Workspace.

Steps to finalize depend on:

- Who will submit the proposal
  - DRDA
  - PI/Project Team

- How the proposal will be submitted
  - All methods except Grants.gov using eResearch
  - Grants.gov using eResearch
  - Online System (e.g. Fastlane, proposalCentral)

When can you finalize the proposal?

- After the PAF has been routed for approval, you can finalize at any time using the Finalize Proposal for Submission to Sponsor Manage Data activity.
- If you have the final proposal, you can finalize when initially completing the PAF worksheet.

Topics:

- Submission Instructions
- Finalization Scenarios
  - Proposal Not Final When Completing PAF Worksheet
  - Finalize Proposal for Submission to Sponsor - After PAF Routed for Approval
    - DRDA Will Submit Method Not Grants.gov using eResearch
    - DRDA Will Submit Method Grants.gov using eResearch
    - PI/Project Team Will Submit
    - Submission Method Electronically via Other Online System
  - Proposal Final When Completing PAF Worksheet
Submissions Instructions

Who will submit the proposal (DRDA or PI/Project Team) & how the proposal will be submitted impacts how you will finalize your proposal.

Submission instructions are first completed in the PAF Worksheet & can be maintained after the PAF is routed for review & approval.

**PAF Worksheet Section 5. Supporting Information – Routing Instructions**

1. Answer question 5.15 Will DRDA submit any proposal documents to the sponsor?
   - Yes = DRDA will submit proposal to sponsor
   - No = PI/Project Team will submit proposal to sponsor.

2. Select all methods that will be used to submit your Proposal.

Note:
After you route the PAF for approval, Submission Instructions can be managed & changed using Submission Instructions under the Manage Data menu on the PAF Workspace.
Proposal Not Final When Completing PAF Worksheet

PAF Worksheet - Section 5. Supporting Information – Routing Instructions

1. If your proposal is not finalized when you are completing the PAF, select No for question 5.17 Are you ready to upload the final document for submission to the sponsor?

Proposal Documents

2. Do NOT attach sponsor-required documents in 6.1 Final Documents for Submission because your final proposal document is NOT complete & ready to be submitted to the sponsor.

3. Attach documents needed for UM Internal Review (Unit & DRDA Review) in 6.2 Supporting Documents.

Important! Do NOT upload the Final Proposal documents here.

- For a Federal Direct Sponsor attach DRDA Administrative Shell which includes:
  - Sponsor Forms
  - Budget
  - Budget Justification
  - Abstract or Draft of Proposal Text

- For Non-Federal Direct Sponsor attach:
  - Draft Contract
  - Internal Budgets
  - Other draft documents The Administrative Shell is not submitted to the sponsor.

4. Complete the steps to route the PAF for approval. The proposal does not have to be finalized before you route for approval.
Finalize for Submission to Sponsor - After PAF Routed for Approval

Use the **Finalize for Submission to Sponsor** Manage Data activity to finalize the proposal after the PAF has been routed for approval.

- Your PAF could be in the Unit Review state or any of the DRDA states.

⚠️ If you have not finalized your proposal and all DRDA Approvals have occurred, what happens next depends on your submission instructions.
- If the submission instructions indicate that **PI & Project Team** will submit the proposal:
  - DRDA will send PAF back to the PI & Project Team for proposal submission to sponsor
  - PI & Primary Research Administrator will receive an email
  - The proposal must be finalized before the submission can be logged.

  A The PAF will be in the state: **Project Team Submission to Sponsor**

- If the submission Instructions indicate that **DRDA** will submit the proposal
  - DRDA will send the PAF back to the PI & Project Team for proposal finalization
  - PI & Primary Research Administrator will receive an email
  - The PAF will be in the state: **DRDA Approved: Awaiting Final Proposal**

  B Regardless of who will submit to the sponsor if the proposal is not finalized, “**According to the PAF, the proposal documents are not yet finalized.**” appears on the PAF Workspace.

⚠️ DRDA will not submit a proposal to a Sponsor until it has been finalized.

⚠️ If the project team is submitting the proposal, the project team cannot log project submission until it is finalized.
Management

Step-By-Step Procedure

DRDA Will Submit & Method Not Grants.gov using eResearch

This section explains the steps to finalize when DRDA will submit & the method is not Grants.gov using eResearch.

Methods could include:

- Adobe submission to Grants.gov
- Email to Sponsor
- Other Online System
- Commercial Courier
- Fax to Sponsor
- Other

PAF Workspace: Unit Review state

Note: Steps to finalize shown using the Finalize Submission for Sponsor Manage Data activity. Could also finalize from PAF Worksheet.

1. Click Finalize for Submission to Sponsor under the Manage Data menu.
2. Indicate for DRDA that the proposal is final & ready to be submitted.

**Note:** Selecting the box means that YES the proposal is final and can be submitted at any time after unit & DRDA approvals are complete.

This check box changes the answer to question 5.17 *Are you ready to upload the final document for submission to the sponsor?* to **Yes** in the PAF worksheet.

3. Upload 1 PDF proposal document for submission to the sponsor, it should include all required sponsor documents, such as:

**Notes:**
- For Non-Federal Direct Sponsor, the PDF should include Statement of Work, Abstract, etc.; Budget; Budget Justification
- For Federal Direct Sponsor, attach 1 PDF. Attach 1 PDF if you submit to Grants.gov via Adobe.

**Important!** Do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

**Warning!** Make sure to click Attach.

4. **Click OK.**
Proposal is finalized & ready for submission to the sponsor.
5. Message appears on the PAF Workspace that the Proposal is finalized & ready for submission to the sponsor.

After all reviews are complete this proposal can be submitted to the sponsor.
DRDA Will Submit Electronically via Grants.gov using eResearch

This section explains the steps to finalize when DRDA will submit & the method is eResearch Submission to Grants.gov.

PAF Workspace: Unit Review state

Note: Steps to finalize shown using Finalize for Submission to Sponsor. Could also finalize from PAF Worksheet.

1. Click Finalize for Submission to DRDA from Manage Data menu.
Finalize for Submission to Sponsor

2. Indicate for DRDA that the proposal is final & ready to be submitted.
   - Selecting the box means that YES the proposal is final and can be submitted at any time after unit & DRDA approvals are complete.
   - This check box changes the answer to question 5.17 Are you ready to upload the final document for submission to the sponsor? to Yes in the PAF worksheet.
   - For Grants.Gov submissions in eResearch, you do not need to upload any documents.

3. Grants.gov status needs to be “Valid for Submission”
   - An error will occur if it is not valid for submission.
   - To learn how to validate see the Grants.gov in eRPM step by step procedure.

4. Click OK.
   Proposal is finalized & ready for submission to the sponsor.
5. A notice is added to the PAF Workspace indicating that the proposal has been finalized and is ready for submission.
PI & Project Team Will Submit

This section explains the steps to finalize when PI/Project Team will submit the proposal to the sponsor:

The project team cannot log project submission until the proposal is finalized.

Note: Steps to finalize shown using Finalize for Submission to Sponsor. Could also finalize from PAF Worksheet.

1. Click Finalize for Submission to Sponsor under the Manage Data menu.
Finalize for Submission to Sponsor

2. Indicate that the proposal is final & ready to be submitted.

3. Upload 1 PDF of the final proposal document to keep a historical record. 
   ! Make sure to click Attach.

4. Click OK. 
   Proposal is finalized & ready for submission to the sponsor.

PAF Workspace: Unit Review State

5. Message appears on the PAF Workspace that the proposal is finalized & ready for submission to the sponsor.
6. Project team can then log submission.

Directions: http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_LogSubmission_SS.pdf
Submission Method Electronically via Other Online System

This section explains the steps to finalize an electronic submission that either the PI & Project Team or DRDA will submit.

PAF Workspace: Unit Review state

Note: Steps to finalize shown using Finalize for Submission to Sponsor. Could also finalize from PAF Worksheet.

1. Click Finalize for Submission to Sponsor under the Manage Data menu.
### Finalize for Submission to Sponsor

#### Step-By-Step Procedure

1. **Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)**
   - **Attach only one PDF file.**
     - Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PI.

2. **Check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission.**
   - *How do I know my Grants.gov forms are complete and valid?*

3. **Check here to indicate that the Final Proposal has been uploaded to the sponsor's system.**

   **Federal Direct Sponsor**
   - Attach only one PDF file in 5.2.
     - If you are submitting to Grants.gov via Adobe, upload your proposal here.

   **Non-Federal Direct Sponsor**
   - Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor. In 5.2, the PDF should include all required sponsor documents, such as:
     - Statement of Work, Abstract, etc.
     - Budget
     - Budget Justification

#### PAF Workspace: Unit Review State

1. **2.** Indicate that the proposal is final & ready to be submitted.
2. **3.** Indicate that the proposal has been uploaded to the sponsor system.
3. **4.** Click **OK**.
4. **5.** Message appears on the PAF Workspace that the Proposal is finalized & ready for submission to the sponsor.
Finalizing from the PAF Worksheet

Use the steps below to finalize your proposal documents when initially completing the PAF worksheet. It will still be in the Proposal Preparation state.

⚠️ If your proposal is NOT ready to be finalized, use Finalize for Submission to Sponsor under Manage Data menu.

PAF Worksheet Section 5. Supporting Information

1. If your proposal is final when completing the PAF, select Yes for question 5.17 Are you ready to upload the final document for submission to the sponsor? on the PAF Worksheet.

Note: If not all documents associated with this proposal have been finalized, please answer no to question 5.17.

Answering YES to question 5.17 indicates to DRDA that the proposal is final and can be submitted at any time after unit & DRDA approvals are complete.

You can manage this page after you route for approval by executing Finalize for Submission to Sponsor under the Manage Data menu in the PAF Workspace.

Even if you validate SF424 (Grants.gov) forms, you still must finalize.
2. If you have uploaded your submission to the sponsor system & cannot upload any documents here, click the checkbox to note this.

Note: You will only have this option if you selected “Other Online System (e.g. Fastlane)” for question 5.15 Submission Methods.

3. Attach sponsor-required documents in 6.1 Final Documents for Submission.
   - For Non-Federal Direct Sponsor, the PDF should include Statement of Work, Abstract, etc.; Budget; Budget Justification
   - For Federal Direct Sponsor, attach 1 PDF.
   - Attach 1 PDF if you submit to Grants.gov via Adobe.
   - For Grants.Gov in eResearch, you do not need to attach a document, but you must validate. See Grants.gov in eRPM step by step procedure.

   Important! Do NOT upload the internal documents here.

   - For Adobe Grants.gov submissions and non-Grants.gov submissions, attach all final documents.
   - Important! Do NOT upload the Final Proposal documents here.
   - For a Federal Direct Sponsor attach DRDA Administrative Shell which includes:
     - Sponsor Forms
     - Budget
     - Budget Justification
     - Abstract or Draft of Proposal Text
   - For Non-Federal Direct Sponsor attach:
     - Draft Contract
     - Internal Budgets
     - Other draft documents The Administrative Shell is not submitted to the sponsor.

5. Complete the steps to route the PAF for approval. You have noted that the proposal is finalized. It can be submitted to the sponsor after all unit & DRDA reviews are complete.
6. After the proposal has been finalized for DRDA submission, “According to the PI/Project Team, the proposal documents have been finalized and are ready for submission to the sponsor” displays.
Goal/outcome:
Log the submission to sponsor.

Objectives:
After completing this module, you will be able to:

- Identify that the Project Team cannot log submission to sponsor until the proposal has been finalized.
- Identify that only the UM PI or Primary Research Administrator can log a submission to a sponsor.
- Log a Project Team submission to the sponsor.

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Log Project Team Submission to Sponsor

All submission methods are recorded in eResearch for a proposal that has been submitted to its sponsor. When the Project Team has submitted the proposal, the recording of the submission methods are accomplished using an activity called Log Project Team Submission to Sponsor. DRDA will not be able to begin processing an award unless this activity is completed.

Who Can Log Project Team Submission to Sponsor: Only the UM PI or Primary Research Administrator can complete the activity Log Project Team Submission to Sponsor.

Important Information

- If the Project Team has indicated on the PAF Worksheet that DRDA will submit, then DRDA will record the submission.

⚠️ The activity Log Project Team Submission to Sponsor is available only under the following conditions:
  - after DRDA review and approvals have been completed
  - proposal has been finalized (upload 1 PDF of the final proposal document when finalizing)
  - and the PAF/proposal in one of the following States:
    - Project Team Submission to Sponsor
    - Submitted to Sponsor
    - Negotiation in Progress

⚠️ When the proposal has been in the state of Project Team Submission to Sponsor for longer than 9 days, the PI and Primary Research Administrator will receive emails at 10, 20 and 30 days as a reminder to execute the activity.
1. Click the **Log Project Team Submission to Sponsor** activity from the PAF Workspace.

2. **Note:** this activity is available only after the proposal has been finalized. You will see the text in green on the PAF Workspace “This proposal has been finalized and is ready for submission.”

**Log Project Team Submission to Sponsor Activity Window**

3. Click **Add**.
Add Submission Dates and Methods

4. Enter **Submission Date**.
5. Select **Submission Method**.
6. Optional, enter **Submission Notes, Tracking Number**, and **Recipient**.
7. Click **OK** to return to the Log Project Team Submission to Sponsor Activity Window.

8. Click **OK** to return to the PAF Workspace.
Notice that the State of the PAF is now **Submitted to Sponsor** and the activity is logged in Recent Activity. If you need to add more submission dates and methods, repeat steps 1-8.
Topic 13: Clone and Cancel PAF

Goal/outcome:
- Clone a PAF for creating a new PAF or for reuse as a template.
- Cancel a PAF.

Objectives:
By the end of this module, you will be able to:
- Identify that anyone listed as on a PAF with edit rights can use the clone functionality.
- Identify how the Primary Research Administrator or UM PI can use the cancel functionality.
- Identify that there are states when you need to contact the DRDA to have a PAF cancelled.

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Clone a PAF

This procedure details how to make a clone (copy) of a PAF Worksheet. Before you begin, you need to locate the PAF you want to clone.

**Who Can Clone:** You can only clone PAFs that you are listed on as key or administrative personnel with edit rights.

**Important Information**
- A PAF can be cloned from any state, e.g., Proposal Preparation, Unit Review, DRDA Review, Cancelled, etc.
- Cloning a PAF automatically relates the clone (child) & original (parent) PAFs unless you select **New** as the cloning type. See the Related PAFs procedure for more information.
- When a PAF is cloned, the copy of the PAF:
  - Contains some, but not all, data from the PAF Worksheet.
  - Does not include from the original PAF attached documents & PI signatures of PAF/Conflict of Interest statement.
- A cloned PAF (child) cannot be accessed from the original (parent). Go to your Home Workspace to find your clone. It will have state of Proposal Preparation.

**PAF Workspace**

1. Click the **Clone PAF** activity from the **PAF Workspace**.

   ![Activities]

   - Copy PAF Info to Grants-gov Forms
   - Project Team Make Changes
   - Project Team Cancel PAF
   - Post a Comment for the Entire Project
   - Clone PAF
Clone PAF Window

2. Enter the name for the new PAF.

Important!
Cloning a PAF automatically relates the clone (child) & original (parent) PAFs unless you select New as the cloning type.

3. Select the cloning type, your options include:

- **New**
  - An application that is being submitted for the first time to a particular sponsor.

- **Full Proposal (Pre-Proposal Use Only)**
  - An application that is being submitted in response to a sponsor invitation following submission and review of a pre-proposal/pre-application to the sponsor.

- **Increment**
  - An application submitted to sponsor in order to receive continuation of funding. This does not undergo a competitive review process from the sponsor but does require a new PAF.

- **Project (Umbrella Agreement Use Only)**
  - An application submitted to a sponsor that fits under an Umbrella Agreement. Must have an existing umbrella agreement to choose this option.

- **(Competitive) Continuation/Renewal**
  - An application for sponsor consideration to continue a currently active or previously funded project (by that same sponsor). Example: Sponsor awarded funding for a five-year project. PI wishes to apply for funding to continue funding for an additional five years. This second application would be considered a Continuation or Renewal

- **Resubmission**
  - An application that is being revised and submitted again for review by the same sponsor, typically altered in response to reviewer critiques of a previous submission of the application. Implies the sponsor made a final decision not to fund the previous version.

- **Supplement**
  - An application for additional funding to supplement a currently funded project (same sponsor). The request may cover additional work or simply increased costs of the existing project.

4. Click OK.

**Note:** When a PAF is cloned, the following information is NOT carried copied:

- PI signatures on PAF/Conflict of Interest Statement
- Attached documents
- Answers to some of the PAF Worksheet questions.

**Tip:** Use the Hide/Show Errors function within the PAF Worksheet to display the required fields that do not copy when a PAF is cloned.
PAF Workspace Recent Activity Section

5. Notice that in the Recent Activity Project Team Cloned PAF.

6. Who cloned the PAF is displayed as Author.

7. When the PAF was cloned is displayed as Activity Date.

8. Click My Home to return to your Home Workspace.

Home Workspace

9. Your cloned PAF appears in the PAFs with Required Action section of your Inbox.

10. Notice that the state of your cloned PAF is Proposal Preparation.
Project Team Cancel PAF

A PAF can be cancelled during the following states:

- Proposal Preparation
- Unit Review
- Unit Review – Project Team Making Changes
- Reviewer Making Changes

Who Can Cancel A PAF: The UM PI and the Primary Research Administrator can cancel a PAF.

Important Information

- If you do not have the activity Project Team Cancel PAF:
  - Verify that you are the UM PI or the Primary Research Administrator (only these roles can cancel a PAF)
  - Verify that you are in a state that allows you to cancel the PAF (Proposal Preparation, Unit Review, Unit Review – Project Team Making Changes, Reviewer Making Changes).
  - If you need the PAF canceled while in another state than listed above use the activity Request DRDA Action to contact the DRDA for assistance to cancel the PAF.

- DRDA can restore a cancelled PAF upon request from the UM Principal Investigator (PI) or the Primary Research Administrator.

PAF Workspace

1. Click Project Team Cancel PAF from the PAF Workspace.

http://erresearch.umich.edu
2. Optional, enter **Comments**.
   You may wish to enter information regarding the reason for the cancellation or who requested the cancellation. These comments appear in the Recent Activity section of the PAF Workspace.

3. Click **OK**.

**PAF Workspace**

4. Notice that the current state of the PAF is Cancelled and that the Activity, the Author, and the date the PAF was cancelled is logged in Recent Activity.

**Home Workspace**

5. Once a PAF has been cancelled, it is listed under the **Cancelled** tab on the Home Workspace.
Topic 14: States from DRDA Reviews to Active

Goal/outcome:
- Review workflow states from DRDA Reviews through Active.

Objectives:
By the end of this module, you will be able to:
- Recognize the DRDA workflow states.
- Identify the need to use the activity Request DRDA Action when changes are needed during DRDA states.
- Recognize award notifications sent from eRPM.
- Locate award documents in eRPM.

<table>
<thead>
<tr>
<th>Materials</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow <a href="http://www.umich.edu/~eresinfo/erpm/workflow/drda_review.html">Link</a></td>
<td>173</td>
</tr>
<tr>
<td>PAF Changes (step by step procedure)</td>
<td>113</td>
</tr>
<tr>
<td>Award Notifications (web page)</td>
<td>174</td>
</tr>
<tr>
<td>Project Award Notice (field description)</td>
<td>175</td>
</tr>
<tr>
<td>Project Award Change (field description)</td>
<td>182</td>
</tr>
</tbody>
</table>
eRPM System Workflow without Changes

Proposal Approval Forms (PAFs) are entered in the eResearch Proposal Management system. The location of where the proposal is in the process is noted with its “State” e.g., Proposal Preparation, Unit Review, DRDA Review.

- **States** are shown on the workflow picture in the yellow boxes that segment the arrow.
- **State transitions** are shown on the workflow picture as black lines that separate the states.

![Diagram of High-Level Proposal States](image)

*Composed of more detailed states.

**Place your mouse on the picture above to view state transitions. Click here to view a larger version.**

- PIs, Reviewers, and Administrators complete “Activities” during various states.
- Before a proposal can move from one state to another certain activities must be completed for a “State Transition” to occur.
Proposal Preparation & Unit Review Training Guide

http://www.umich.edu/~eresinfo/erp/docs/PANsPACs.html

Award Notifications Sent from eRPM - Since 1/5/09

- PAN & PAC award notifications are generated from the eRPM system & sent via email to investigators and campus administrators, specifically:
  - UM Principal Investigator
  - Sponsor Principal Investigator
  - Participating Investigators with Specified Effort
  - Administrative Contacts (all administrators listed on proposal or project)
  - Any person (or group e-mail address) listed as the PAN/PAC Notifiers for a unit (department) that was required to review the PAF.
    - Initially identified by Research Unit Liaisons.
    - Maintain in eRPM by Reviewers or Research Unit Liaisons.
- Award Notices (PAN/PAC) Notice ID
  - Notice ID format:
    - PGN-n (Project Grant Number dash number) e.g., F123456-2
- All PAN/PACs listed on Project Workspace

Need more information?
View samples that have detailed descriptions
-- Sample PAN
-- Sample PAC

Improvements Made - In Feb & Mar 09

- E-mail Subject line includes: Notice ID (PGN #), DRDA number, UM Principal Investigator last name
- PAN test moved to improve printability
- PAN/PAC numbering changes
  - Note: Any PAN sent between 1/5 – 2/24/09
    - PAN numbered with a suffix of “1” (e.g., F123456-1)
    - Caused first PAC to be numbered “2” (e.g., F123456-2)
  - Effective 2/25/09
    - PAN numbering begins with to PGN-0
      - E.g., F123456-0
    - PACs will increment the Notice ID by 1
      - First PAC is: PGN-1 (e.g., F123456-1), second PAC is: PGN-2 (e.g., F123456-2), etc.
- PAN/PAC e-mail recipients listed at bottom of PAN/PAC e-mail

eRPM address changed - As of 3/26/2009

If you have PAN/PAC message sent prior to 3/26/09, when you click on the link to eRPM you will receive a security certificate error. If you accept the error, you will be able to proceed and view the award document.
Starting January 5, 2009:

- PAN & PAC award notifications are generated from the eRPM system & sent via email to investigators and campus administrators, specifically:
  - UM Principal Investigator
  - Sponsor Principal Investigator
  - Participating Investigators with Specified Effort
  - Administrative Contacts
  - Any person (or group e-mail address) listed as the PAN/PAC Notifiers for a unit (department) that was required to review the PAF.

- **Important!** If you have junk or spam email filters, please add eresearch@umich.edu to your address book/contacts or safe/trusted senders list.

- The content of the award notification has not changed although the appearance is slightly different.

- The award notification is now in the text of an e-mail notification instead of an attached document.
  - **Tips:** Messages sent from the eResearch system are sent as html messages. If you use a plain text email system, e.g., Groupwise, enable html messages so that the link to the award document is active.
  - **Warning!** If you use a plain text e-mail system, e.g., Groupwise, when you forward an email sent from the eResearch system, the link is broken.

- Links into the eRPM system will be included in the e-mail to provide access to the actual grant and contract documents.

- When you start to use the eResearch Proposal Management (eRPM) system, you will be able to view award notifications right in eRPM.

- The PAN is broken into three sections below to demonstrate the changes. To view an example of the full PAN, go to the end of this document.
Project Award Notice – Section 1 (continued)

C. UM Principal Investigator who received the award and date when processed.

D. Administrative Home for the project.

E. DRDA Project Representative contact for the award.

F. DRDA number.

Note: You may see 2 different DRDA number formats. All proposals that were created/entered in eRPM have the new DRDA number format: FY-PAF12345 e.g., 09-PAF12345

G. Notice ID

- Format: Project grant number (PGN) - 0 e.g., F123456-0
- Any PAN sent between January 5 – February 24, 2009 has the following format: PGN -1.
- Based on user feedback the Notice ID for PANs was changed to PGN-0 in order to accommodate the standard PAC numbering sequence.
- PACs will increment the Notice ID.
  - First PAC is: PGN-1 e.g., F123456-1
  - Second PAC is: PGN-2 e.g., F123456-2
- Notice ID appears here and in the e-mail subject.

H. Project Title
Project Award Notice – Section 2

I. Sponsor information
J. Project Grant information
K. Class code
L. Project period estimated award
M. Award document link

Award Document Notes:
- You will be prompted to login with your Kerberos ID to download a full copy of the award document.
- You will also be able to view award documents in the eRPM system (when you start using the system).
- **Warning!** If you are a plain text email system user, even if you turn on view html messages, if you forward this message you will break this link. To view award, you can login to eRPM and find the project in the system.
- **Warning!** Forwarding a message to someone does NOT give them access to view it in eResearch. He/she must be listed on the project or be a Reviewer to have access to view the award in eResearch.
- **Important!** If you are a plain text email system user (e.g., Groupwise), you must enable view html messages for this link to work.
- **Warning!** You cannot copy the Award document link and paste it into a web browser. It will not work.

Project Award Notice – Section 3

N. Budget Commitment
O. Budget Period
P. Indirect Cost Rate
Q. No charges are allowed prior to
R. Financial Operations Project/Grant Coordinator
S. Budget Period UM Cost Share

This grant is subject to the General Terms and Conditions of the Federal Demonstration Partnership (FDP), for more information visit http://www.research.umich.edu/policies/federaltfp.html

This grant is subject to the Research Terms and Conditions (RTC). For more information, please visit http://www.research.umich.edu/policies/federaltfp.html

Budget Period UM Cost Share:

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Dept ID</th>
<th>Department</th>
<th>Source</th>
<th>Direct Costs</th>
<th>Indirect Costs</th>
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<tbody>
<tr>
<td>Total Direct Cost Share - UM:</td>
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<tr>
<td>Total Indirect Cost Share - UM:</td>
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<td>0.00</td>
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<tr>
<td>Total UM Cost Share:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>
Project Award Notice – Section 4

T. Award has been received statement.

The University Of Michigan  
Division of Research Development and Administration  
1056 Wolverine Tower

An award has been received and processed for the proposal identified above. A Project Award Notice (PAN) has been prepared and approved by ORDA. Both the PAN and the award are available from the eResearch project site. The project grant and subcontracts WILL NOT yet be active in the Financial and HRMS systems when you receive this message. You will receive a separate notification from Financial Operations when the numbers are approved.

Listed below are a number of things the Project Team can do before the Project/grant and subcontracts are active.

- Share the PAN and copy of the grant or contract with others who need it.
- Review the PAN for the terms of the grant/contract.
- Review the grant or contract for terms and conditions, deliverables, special reports.
- Set up internal record-keeping systems.
- Prepare 7471s to budget sub-project/grants, if relevant.
- Review faculty, staff and student appointments to prepare for appointment changes. Don’t forget cost sharing appointments. Remember that material changes in effort impact effort certification. Updated reports may be required.
- Prepare personnel for term types, barcodes, and additional shortcodes if necessary.
- Prepare paperwork to request sub-awards, if relevant. If sub-awards were written into your proposal, the PAN should include a memo describing the process you need to follow to request a sub-award.
- If the budget has been modified or a modular budget was submitted, a 7471 can be submitted to Sponsored Financial Operations before the project/grant is activated so that the budget is set up appropriately. (If your budget includes A-21 monitored expenses, the 7471 and justification should be directed to ORDA.)
- Follow the directions on the front of the PAN to change the statement recipient, if necessary.
- Work with the Purchasing Department to request quotes for major equipment purchases.
- Request cost sharing transfers, if relevant.

If you have any questions about the above activities, please contact your Sponsored Programs Account Coordinator.

Project Workspace

U. Once you start to use eResearch Proposal Management, you can access your project workspaces via your Home Workspace.

V. You will be able to view all award notices on the project workspace.
**Project Award Notice**

DO NOT REPLY TO THIS MESSAGE. NO eRESEARCH ACTION REQUIRED

<table>
<thead>
<tr>
<th>UM Principal Investigator:</th>
<th>Pat Investigator</th>
<th>Date:</th>
<th>2/18/09</th>
</tr>
</thead>
</table>

**Unit (Department ID):**
Otorhinolaryngology Department (249000)

**From DRDA Project Representative:**
DRDA Project Representative, 734-555-5555, drda_pr@umich.edu

- **DRDA Number:** 09-PAF12345
- **Notice ID:** F123456-0
- **Project Title:** Sample Project Title

**Sponsors:**

<table>
<thead>
<tr>
<th>PAF Sponsor Name</th>
<th>Sponsor ID</th>
<th>Official Sponsor Name</th>
<th>Sponsor Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSF</td>
<td>909300</td>
<td>National Science Foundation</td>
<td>Direct</td>
</tr>
</tbody>
</table>

**Direct Sponsor Award Reference Number:**

**Prime Sponsor Award Reference Number:**

**CFDA Number:**
There are no items to display

**PGN No:**

<table>
<thead>
<tr>
<th>PGN No</th>
<th>Short Cd</th>
<th>CS Short Cd</th>
<th>Parent?</th>
</tr>
</thead>
<tbody>
<tr>
<td>F123456</td>
<td></td>
<td></td>
<td>yes</td>
</tr>
</tbody>
</table>

**Class No:**
On-Campus Research (22000)

**Project Period Estimated Award:**
$6,552,000.00

**Project Period:**
2/23/2009 to 2/22/2010

**Award Documents:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Version</th>
</tr>
</thead>
</table>
Budget Commitment: $5,024.00  
Budget Period: 2/23/2009 to 2/22/2010

Indirect Cost Rate: 26%  
No Charges are allowed prior to: 2/23/2009

Financial Operations Project/Grant Coordinator: Amanda Administrator, 734-555-5555, amandaadmin@umich.edu

***The Primary Post-Award Contact is the only person who will receive any M-Pathways generated documents. If you wish to change the recipient of these documents, please contact the Financial Operations Project/Grant Coordinator.

This grant is subject to the General Terms and Conditions of the Federal Demonstration Partnership (FDP), for more information visit http://www.research.umich.edu/policies/federal/fdp.html

This grant is subject to the Research Terms and Conditions (RTC). For more information, please visit http://www.research.umich.edu/policies/federal/fdp.html.

### Budget Period UM Cost Share:

<table>
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<tr>
<th>Line Item</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are no items to display

| Total Direct Cost Share - UM: $0.00 | Total Indirect Cost Share - UM: $0.00 | Total UM Cost Share: $0.00 |
The University Of Michigan  
Division of Research Development and Administration  
1056 Wolverine Tower

An award has been received and processed for the proposal identified above. A Project Award Notice (PAN) has been prepared and approved by DRDA. Both the PAN and the award are available from the eResearch project site. The project/grant and shortcode WILL NOT yet be active in the Financial and HRMS systems when you receive this message. You will receive a separate notice from Financial Operations when the numbers are activated.

Listed below are a number of things the Project Team can do before the Project/grant and shortcode are active.

- Share the PAN and copy of the grant or contract with others who need it.
- Review the PAN for the terms of the grant/contract.
- Review the grant or contract for terms and conditions, deliverables, special reports.
- Set up internal record-keeping systems.
- Prepare 7471s to budget sub-project/grants, if relevant.
- Review faculty, staff and student appointments to prepare for appointment changes. Don’t forget cost sharing appointments. Remember that material changes in effort impact effort certification; updated reports may be required.
- Prepare paperwork for item types, barcodes, and additional shortcodes if necessary.
- Prepare paperwork to request sub-contracts, if relevant. If sub-contracts were written into your proposal, the PAN should include a memo describing the process you need to follow to request a sub-contract.
- If the budget has been modified or a modular budget was submitted, a 7471 can be submitted to Sponsored Financial Operations before the project/grant is activated so that the budget is set up appropriately. (If your budget includes A-21 monitored expenses, the 7471 and justification should be directed to DRDA.)
- Follow the directions on the front of the PAN to change the statement recipient if necessary.
- Work with the Purchasing Department to request quotes for major equipment purchases.
- Request cost sharing transfers, if relevant.

If you have any questions about the above activities, please contact your Sponsored Programs Account Coordinator.
Starting January 5, 2009:

- PAN & PAC award notifications are generated from the eRPM system & sent via email to investigators and campus administrators, specifically:
  - UM Principal Investigator
  - Sponsor Principal Investigator
  - Participating Investigators with Specified Effort
  - Administrative Contacts
  - Any person (or group e-mail address) listed as the PAN/PAC Notifiers for a unit (department) that was required to review the PAF.

- **Important!** If you have junk or spam email filters, please add eresearch@umich.edu to your address book/contacts or safe/trusted senders list.

- The content of the award notification has not changed although the appearance is slightly different.

- The award notification is now in the text of an e-mail notification instead of an attached document.
  - **Tips:** Messages sent from the eResearch system are sent as html messages. If you use a plain text email system, e.g., Groupwise, enable html messages so that the link to the award document is active.
  - **Warning!** If you use a plain text e-mail system, e.g., Groupwise, when you forward an email sent from the eResearch system, the link is broken.

- Links into the eRPM system will be included in the e-mail to provide access to the actual grant and contract documents.

- When you start to use the eResearch Proposal Management (eRPM) system, you will be able to view award notifications right in eRPM.

- A sample PAC is broken into three sections below to demonstrate the changes. To view an example of the full PAC, go to the end of this document.

### Project Award Change – Section 1

<table>
<thead>
<tr>
<th>From:</th>
<th><a href="mailto:eresearch@umich.edu">eresearch@umich.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sent:</td>
<td>Wednesday, February 10, 2009 2:11 PM</td>
</tr>
<tr>
<td>To:</td>
<td><a href="mailto:investigator_pat@umich.edu">investigator_pat@umich.edu</a>, <a href="mailto:administrativecontacts@umich.edu">administrativecontacts@umich.edu</a>, <a href="mailto:participation@umich.edu">participation@umich.edu</a></td>
</tr>
<tr>
<td>Notice ID:</td>
<td>PAC for F123456-2 (09-PAF12345) Investigator</td>
</tr>
<tr>
<td>Subject:</td>
<td>Notice of change to PAC F123456-2 (09-PAF12345) Investigator</td>
</tr>
</tbody>
</table>

**UM Principal Investigator:** Pat Investigator  
**Date:** 2/10/09

**Unit (Department ID):** Otolaryngology Department (249009)

**From DRDA Project Representative:** DRDA Project Representative, 734-555-5555, drda_pr@umich.edu

**DRDA Number:** F123456-2

**Notice ID:** PGN-1 (any number higher than 0 is a PAC number) e.g., F123456-2

**Project Title:** Sample Project Title

---

A. Notice that the sender is eresearch@umich.edu.

**Note:** If you use spam filters, please make a rule or exception so that you can receive emails from eresearch.umich.edu.

B. Email **Subject** includes:

1. **PAC**
2. **Notice ID**  
   - PGN-1 (any number higher than 0 is a PAC number)  
   - e.g., F123456-2
3. **(DRDA Number)**  
   - e.g., (09-PAF12345)
4. **UM Principal Investigator Last Name**  
   - e.g., Investigator
Project Award Change – Section 1 (continued)

C. UM Principal Investigator who received the award and date when processed.

D. Administrative Home for the project.

E. DRDA Project Representative contact for the award.

F. DRDA number.

Note: You may see 2 different DRDA number formats. All proposals that were created/entered in eRPM have the new DRDA number format: FY-PAF12345 e.g., 09-PAF12345

G. Notice ID

- Format: Project grant number (PGN) – 2 (any number higher than 0 is a PAC number) e.g., F123456-2

- Any PAN sent between January 5 – February 24, 2009 has the following format: PGN -1.

- Based on user feedback the Notice ID for PANs was changed to PGN-0 in order to accommodate the standard PAC numbering sequence.

- PACs will increment the Notice ID. First PAC is: PGN-1 e.g., F123456-1 Second PAC is: PGN-2 e.g., F123456-2

- Notice ID appears here and in the e-mail subject.

H. Project Title
Project Award Change – Section 2

I. Sponsor information
J. Project Grant information
K. Class code
L. Project period estimated award
M. Award document link

Award Document Notes:

- You will be prompted to login with your Kerberos ID to download a full copy of the award document.
- You will also be able to view award documents in the eRPM system (when you start using the system).
- **Warning!** If you are a plain text email system user, even if you turn on view html messages, if you forward this message you will break this link. To view award, you can login to eRPM and find the award in the system.
- **Warning!** Forwarding a message to someone does NOT give them access to view it in eResearch. He/she must be listed on the project or be a Reviewer to have access to view the award in eResearch.
- **Important!** If you are a plain text email system user (e.g., Groupwise), you must enable view html messages for this link to work.
- **Warning!** You cannot copy the Award document link and paste it into a web browser. It will not work.

Project Award Change – Section 3

N. Financial Operations
Project/Grant Coordinator

amandasadmin@umich.edu

***The Primary Post-Award Contact is the only person who will receive any M-Pathways generated documents. If you wish to change the recipient of these documents, please contact the Financial Operations Project/Grant Coordinator.

The University Of Michigan
Division of Research Development and Administration
1056 Wolverine Tower
O. Once you start to use eResearch Proposal Management, you can access your project workspaces via your Home Workspace.

P. You will be able to view all award notices on the project workspace.
From: eresearch@umich.edu
Sent: Wednesday, February 20, 2009 2:11 PM
To: investigator_pat@umich.edu, administrativecontacts@umich.edu, panpancontacts@umich.edu
Subject: PAC for F123456-2 (09-PAF12345) Investigator

Project Award Change - Administrative
DO NOT REPLY TO THIS MESSAGE. NO eRESEARCH ACTION REQUIRED

UM Principal Investigator: Pat Investigator
Date: 2/20/09

Unit (Department ID): Otorhinolaryngology Department (249000)

From DRDA Project Representative: DRDA Project Representative, 734-555-5555, drda_pr@umich.edu

DRDA Number: 09-PAF12345
Notice ID: F123456-2
Project Title: Sample Project Title

Sponsors:

<table>
<thead>
<tr>
<th>PAF Sponsor Name</th>
<th>Sponsor ID</th>
<th>Official Sponsor Name</th>
<th>Sponsor Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSF</td>
<td>909300</td>
<td>National Science Foundation</td>
<td>Direct</td>
</tr>
</tbody>
</table>

Direct Sponsor Award Reference Number:

Prime Sponsor Award Reference Number:

CFDA Number: There are no items to display

PGN No:

<table>
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<th>PGN</th>
<th>Short Cd</th>
<th>CS Short Cd</th>
<th>Parent?</th>
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<tbody>
<tr>
<td>F123456</td>
<td></td>
<td></td>
<td>yes</td>
</tr>
</tbody>
</table>

Class No: On-Campus Research (22000)
Project Period Estimated Award: $552,000.00
Project Period: 3/09/2009 to 2/22/2010
Award Documents: Name

Last updated 3/7/2009
http://eresearch.umich.edu
Training Guide Last Updated: 10/01/2009
Financial Operations Project/Grant Coordinator: Amanda Administrator, 734-555-5555, amandaadmin@umich.edu

***The Primary Post-Award Contact is the only person who will receive any M-Pathways generated documents. If you wish to change the recipient of these documents, please contact the Financial Operations Project/Grant Coordinator.
Topic 15: Reviewer Section - Topics and Materials

Reviewer Section Objectives:

By the end of this course, you will be able to use eResearch to review proposals and projects, make necessary changes, and submit approval where you have the appropriate permissions.

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For this section of the course, you need to switch hats to your Reviewer role. We start by examining the same routing table we saw as a PI & Project Team member when we routed for approval. Now we need to look at this from the perspective of a Reviewer in a department.

Individuals are set-up as Reviewers or Reviewers Who Can Sign (Approvers) for specific Department IDs. This section starts by examining the Reviewer Home Workspace & Manage Department Information (how departments are set-up in eResearch).

**Goals:**

Use the Home Workspace in order to find PAFs that need review, view PAF Workspace, and understand how the routing order is determined.

**Objectives:**

After completing this module, you will be able to:

- Use the PAF Workspace routing table to view routing and review order, and approval status.
- Locate the PAFs that require your review.
- Manage Department Information

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</table>
PAF Ready for Unit Review Email

The following is an example of an email notification generated by eRPM to alert a PAF Email Notification contact person that a PAF is ready for their unit to review and approve.

Email Sample

*eResearch Action Required. Please do not reply to this message.*

The PAF referenced below requires your department's review and approval.

**PAF Information:**
- **DRDA Number:** 09-PAF00085
- **PAF Title:** Hummingbird Metabolism as a Theoretical Model for Landfill Reduction
- **PI:** Stephen Forrest
- **Project Administrative Home:** School of Social Work
- **Primary Research Administrator:** Jason Johnson

**Routed for Unit Review & Approval:** 11/14/2008 11:35 AM
- **Direct Sponsor:** Research Institute of Innovative Technology for the Earth
- **Sponsor Deadline:** 11/20/2008

**Action Required:**
1. Click here to access the PAF: [09-PAF00085](#)
   You may be prompted to login using your uniqname and Kerberos password.
2. Click View PAF Summary to review PAF contents and supporting documents.
3. After review of PAF and proposal, click Unit Approve or Reviewer Request Changes.

**Recipients:**
This message was sent to the following:
- Reese Reviewer
- Arnold Approver

**Questions:**

1. Refer to [online help](http://eresearch.umich.edu/) for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

[http://www.eresearch.umich.edu/](http://www.eresearch.umich.edu/)
Manage Department Information

Review Access, Email Notifications, and Contacts for Proposal Questions

- Unit Liaisons (ULs) & Reviewers can manage department information for their assigned departments. They can:
  - Add department information: Page 2
  - Create Proposal Management Accounts: Page 6
  - Delete department information: Page 7

Important Information

⚠️ Refer to your Unit policy about who should Manage Department information.
- Some units may want the Research Unit Liaison to manage all of this information
- Some units may pick a point reviewer to manage this information
- Some units may ask individual reviewers to manage information, etc.

Contact your Research Unit Liaison for more information:
[http://www.umich.edu/~eresinfo/erpm/uls/rules_list.html](http://www.umich.edu/~eresinfo/erpm/uls/rules_list.html)

⚠️ Information managed by a Reviewer or Research Unit Liaison for his/her assigned departments includes:
  - **Reviewer**
    Person in Dept ID who can Review Proposals
  - **Reviewer Who Can Sign**
    Person in Dept ID who can Approve (Review & Sign) Proposals
    **Important!** Can only be changed by Unit Liaison.
  - **Department Contact**
    For Dept ID, Public Contact to Facilitate Proposal Preparation & Review Questions
  - **Department PAF Notifiers**
    For Dept ID, person or email group who receives email notification when item such as a PAF or hardship is sent to their department for review.
    Does not give user system access (e.g., Reviewer or Reviewer Who Can Sign Access).
  - **PAN/PAC Notifier**
    For Dept ID, person or email group who receives email notifications of new PAN/PACs after DRDA completes the Release Award Notification activity.
    Does not give user system access (e.g., Reviewer or Reviewer Who Can Sign Access).

⚠️ If you need a new department added, contact the eResearch Proposal Management team via the Contact Us page: [http://www.umich.edu/~eresinfo/erpm/contact.html](http://www.umich.edu/~eresinfo/erpm/contact.html).

Include:
  - Name and Dept ID of the new department
  - If there are higher level departments that department rolls-up to (reports to) in the routing hierarchy
ADD DEPARTMENT INFORMATION

Add Reviewer, Reviewer Who Can Sign (only Unit Liaison Can Manage This), Contact for Proposal Questions, or Email Notifications.

Unit Liaison - Home Workspace

2. Login using your uniqname & password.
3. Click on the correct role.
   Unit Liaisons, click Unit Liaison role.
   Reviewers, click Reviewer role.
4. If you are a Reviewer, click the Manage Departments Tab in your Home Workspace.

Reviewer - Home Workspace

5. Find the department that needs information managed. All the departments that you are assigned to are displayed.

Tip: Use Filter by to search for departments by ID (number) or name. Select a Filter by criteria, enter a keyword in the field, and click Go.

Note: If you cannot find a needed department, contact the eResearch Proposal Management team via the Contact Us page: http://www.umich.edu/~eresinfo/erpm/contact.html . Include: Name and Dept ID of the department
6. From your Home Workspace, click **Manage Department**

**Note:** Unit Liaisons have two sections **Department Information in need of Review** and **Management Department Information**. They can click Management Department from either section.

**Note:** Departments are in the **Department in need of Review** section if they have been newly added. They are put in this section to flag them for you so that you realize that they need review and department information added.
### Manage Department Information

#### Manage Unit

**College of Lit, Science & Arts (170000)**

<table>
<thead>
<tr>
<th>Unit Leader</th>
<th>Department</th>
<th>Is Backup Unit Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peggy Westrick</td>
<td>LSA Dean: Dean's Office</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Person</th>
<th>Employer</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peggy Westrick</td>
<td>LSA Dean: Dean's Office</td>
<td>Admin Coord/Project Coord</td>
</tr>
</tbody>
</table>

#### Approval Hierarchy:

**College of Lit, Science & Arts (170000)**

If this unit is listed as the Administrative Home for any proposal, it should be the last to approve before the Dean's Office during routing and approval: no

#### Unit Liaisons:

8. Peggy Westrick
7. peggy.westrick@umich.edu

<table>
<thead>
<tr>
<th>Person</th>
<th>Employer</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peggy Westrick</td>
<td>LSA Dean: Dean's Office</td>
<td>Admin Coord/Project Coord</td>
</tr>
</tbody>
</table>

#### Contact for Preproposal Questions:

9. Contact Person
   - LSA Dean: Dean's Office
   - Executive Secretary

#### Reviewers Who Can Sign:

<table>
<thead>
<tr>
<th>Person</th>
<th>Employer</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>LSA Dean: Dean's Office</td>
<td>Admin Coord/Project Coord</td>
</tr>
<tr>
<td>Review</td>
<td>LSA Dean: Dean's Office</td>
<td>Research Process Senior Manager</td>
</tr>
</tbody>
</table>

#### Reviewers:

<table>
<thead>
<tr>
<th>Person</th>
<th>Employer</th>
<th>Title</th>
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</thead>
<tbody>
<tr>
<td>Review</td>
<td>LSA Dean: Dean's Office</td>
<td>Admin Coord/Project Coord</td>
</tr>
<tr>
<td>Review</td>
<td>LSA Dean: Dean's Office</td>
<td>Executive Secretary</td>
</tr>
</tbody>
</table>

#### PAF Email Notification:

<table>
<thead>
<tr>
<th>Person</th>
<th>Employer</th>
<th>Title</th>
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<tbody>
<tr>
<td>Add</td>
<td>Email Contact</td>
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</tbody>
</table>

#### PAN/PAC Email Notification:

<table>
<thead>
<tr>
<th>Person</th>
<th>Employer</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Contact 1</td>
<td>LSA Dean: Dean's Office</td>
<td>Admin Coord/Project Coord</td>
</tr>
<tr>
<td>Email Contact 2</td>
<td>LSA Dean: Dean's Office</td>
<td>Executive Secretary</td>
</tr>
</tbody>
</table>

If this box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box.

*Note:* If the user is not in the system, you may Create A New User Account...

### Instructions

7. Verify the information about the department.
   - If changes are needed, contact the eResearch Proposal Management team via the Contact Us page: [http://www.umich.edu/~eresinfo/erpm/contact.html](http://www.umich.edu/~eresinfo/erpm/contact.html). Include:
     - Name and Dept ID of the new department
     - If there are higher level departments that department rolls-up to (reports to) in the routing hierarchy.

8. The Unit Liaisons for the department are listed.
   - To make changes contact the eResearch Proposal Management team via the Contact Us page: [http://www.umich.edu/~eresinfo/erpm/contact.html](http://www.umich.edu/~eresinfo/erpm/contact.html).

9. To add a new Contact for Proposal Questions, Reviewer, Reviewers Who Can Sign (only ULs can edit this) PAF Email Notification, or PAN/PAC Email Notification, click Add.
Select One or More Persons

10. Select a Filter by criteria (e.g., Last) and enter a keyword (e.g., last name) in the field.

   **Note:** Click Advanced to use multiple Filter by criteria.

11. Click Go.

12. Select the person to add.

13. Click OK to add the person and return to the Management Department Information page.

14. If you needed to verify information for this department and have completed your review, unselect this box so that it does not continue to appear in your Department Information in need of Review section of your Inbox.

15. Click OK to save your work and return to your Home Workspace.
CREATE PROPOSAL MANAGEMENT ACCOUNT

Many Proposal Management accounts have been pre-created. Accounts are automatically created the first time a person with a uniqname & password logs into eResearch Proposal Management.

If you cannot find a person in the Proposal Management system when adding new information for your department, you may a Create a New User Account.

Unit Liaison Manage Department Information

1. Click the Create A New User Account… link on the bottom of the Manage Department Information page.

2. Select the search type.

3. Enter the last name or uniqname.

4. Click Search to search for the person against the M-Pathways Human Resources data.

5. Click the person’s Uniqname to select person who needs an eResearch account created.

6. Verify that you have found the correct person.

7. Click Save to create an eResearch Proposal Management account for the person.

8. Click OK when the User Account Success creation message appears. You will now be able to find the person when managing department information.
DELETE DEPARTMENT INFORMATION

If a person should no longer be a Reviewer, Reviewer Who Can Sign, Contact for Proposal Questions, or Email Notification you can delete (remove) the person from your department information.

Unit Liaison Manage Department Information

1. To delete a person, select the person
2. Click Remove.
3. Click OK to save the changes made.
Topic 17: PAF Workspace and Reviewing a PAF

Goals:
Develop a familiarity with what information is contained in the PAF Workspace and how to retrieve information for the review.

Objectives:
After completing this module, you will be able to:

- Retrieve PAF information by using the PAF workspace.
- Open the PAF Summary and attached documents.
- Print the PAF Summary and attached documents.
- Add Unit Comments viewable to just a specific department.
- Understand that comments posted using the Post a Comment activity are viewable to the entire project.

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<tr>
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<tr>
<td>Post a Comment to the Entire Project (step by step procedure)</td>
<td>97</td>
</tr>
<tr>
<td>Posted Comment for the Entire Project (sample email)</td>
<td>99</td>
</tr>
</tbody>
</table>
Topic 18: PAF Worksheet Changes During Unit Review

Goals/Outcomes
Practice making changes and requesting changes, and to interpret change log details for further information.

Objectives:
After completing this module, you will be able to:

- Make and Submit PAF Changes.
- Understand that as a Reviewer you can also view and interpret Change Logs.
- Request that the Project Team Make Changes.

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<th>Materials</th>
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<tbody>
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<td>Changes Made Email (sample email)</td>
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</tr>
<tr>
<td>View Change Details (step by step procedure)</td>
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PAF Changes

In the state of Unit Review, a Reviewer or a Reviewer Who Can Sign (Approver) can make and submit their own changes or request that the project team make and submit the changes.

When a Reviewer submits a change, a notification is sent the Principal Investigator (PI), Primary Research Administrator, and the email notification contact for departments who have already approved the PAF.

When a Reviewer requests a change, a notification is sent the PI and Primary Research Administrator.

**Important!** When a reviewer requests a change from a PI/Project Team, that department cannot approve the proposal until the PI/Project Team submits the change.

**Note:** If you cannot locate the PAF:

- Make sure that you viewing the correct workspace by looking for the bolded role title under My Roles.
- Click the **Upcoming** tab. Any PAFs that will require your review but have not yet moved to your Inbox are located under this tab.
- Click on **All PAFs** and find the PAF. Refer to the Find PAFs Step by Step Procedure for more information on how to use the Filter by function.

### REVIEWER MAKE CHANGES AND SUBMIT CHANGES

PAF Workspace Main tab

1. Click the **Reviewer Make Changes** activity from the PAF Workspace.
2. Select the departments that your changes will impact.
3. Strongly recommended, enter Comments about the changes you a planning to make.
4. Click OK to return to the PAF Workspace.

**Note:** The PAF is moved to the state of Reviewer Making Changes.

5. Click the Edit PAF Worksheet link from the PAF Workspace to make changes.

**Note:** Make sure you click Save on each page you change in the PAF Worksheet.
6. Click **Submit Changes** activity from the PAF Workspace.

**Note:** Changes will not be written to the PAF & viewed by everyone else with access to the PAF (e.g., project team, other Reviewers & DRDA) until they are submitted.
7. Select the department(s) on behalf of which you made changes.

8. Select a Change Type.

9. Enter **Comments** describing the changes made.

**Note:** The comments that you enter on this activity are included in the email notification sent PI, Primary Research Administrator, and any Reviewers who have already approved the PAF.

10. Click **OK**.

**Note:** The PAF is returned to the state of Unit Review.
REVIEWER REQUEST CHANGES

PAF Workspace Main tab

1. Click the **Reviewer Request Changes** activity from the PAF Workspace.
2. Select the departments on behalf of which you are requesting changes from the project team.

3. Enter **Comments** explaining the change requested.

**Note:** The comments that you enter on this activity are included in the email notification sent to the PI and Primary Research Administrator.

4. Optional, **Add** Documents.

5. Click **OK**.

**Note:** This activity moves the PAF into the state of Unit Review-Project Team Making Changes. The PAF is now only editable by personnel listed on the PAF with edit rights. Once the changes have been submitted, the requesting department is able to continue the review and approval process.
Changes Made Email

The following is an example of an email notification generated by eRPM to alert PAF contact persons in the Units who have already submitted approval that changes were made to a PAF.

Email Sample

---

This is for information only. No action required.

The Project Team has made changes to the PAF referenced below. You will be notified if further action is required.

Comments:
I've attached the cost share approval

PAF Information:
DRDA Number: 09-PAF00084
PAF Title: Iforsyth Mice Metabolism as a Theoretical Model for Landfill Reduction
PI: Stephen Forrest
Project Administrative Home: 216100 COE EECS - ECE Division
Primary Research Administrator: Jason Johnson

Routed for Unit Review & Approval: 11/14/2008
Direct Sponsor: Research Institute of Innovative Technology for the Earth
Sponsor Deadline: 11/20/2008

Click here to access the PAF: 09-PAF00084

Recipients
This message was sent to the following:
Arnold Approver

Questions:

1. Refer to online help for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

http://www.eresearch.umn.edu/
Topic 19: Submitting Unit Approval & Assigning Ad Hoc Reviewers

Goals/Outcomes:
Gain an understanding of the impact of assigning an ad hoc reviewer and how unit approval is submitted.

Objectives:
After completing this module, you will be able to:

- Identify that only a Reviewer Who Can Sign can approve.
- Submit Approval.
- Assign an Ad Hoc Reviewer.
  - Understand that an Ad Hoc reviewer does not have formal approver rights for a department, but can post a Review Comment or Project Team comment.

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<tbody>
<tr>
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</tr>
<tr>
<td>Assign an Ad Hoc Reviewer (step by step procedure)</td>
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</tbody>
</table>
Unit Review and Approve

When a PAF moves from Proposal Preparation into the state of Unit Review, each Reviewer can access that PAF from their Home Workspace.

You will receive an email with a link to the PAF if you have elected to receive notifications. Contact your Unit Liaison regarding your email notification status.

This procedure assumes that you are already logged in to eResearch Proposal Management (eRPM). If you are not familiar with the login procedure, refer to the Login to eResearch Proposal Management Step by Step Procedure.

Who Can Approve the PAF: In order to approve a PAF for a department, you must have Reviewer Who Can Sign access. If you have Reviewer access you can see that PAF that needs to be reviewed, but you cannot approve.

For more information about how your Department is set-up, see the Manage Departments tab or contact your Research Unit Liaison.

Reviewer Home Workspace Inbox tab

1. Click on the PAF Name to open the PAF Workspace.

Note: If you cannot locate the PAF:

- Make sure that you viewing the correct workspace by looking for the bolded role title under My Roles.
- Click the Upcoming tab. Any PAFs that will require your review but have not yet moved to your Inbox are located under this tab.
- Click on All PAFs and find the PAF. Refer to the Find PAFs Step by Step Procedure for more information on how to use the Filter by function.
2. **Click Display PAF Summary.**

**Note:** You can submit your unit approval or request that the project team make changes either:

- Directly on the PAF Summary.
- By returning here to the PAF Workspace using the **Unit Approve** or the **Reviewer Request Changes** activities.
If the Unit Approve button is not displayed, the following reasons may be the cause:

- The PAF is in the state of Unit Review-Project Team Making Changes. When the project team submits their changes, the state is returned to Unit Review and the Unit Approve button will be available.
- You may not have the appropriate permissions as a signer. Contact your Unit Liaison regarding your account.

If you have completed your review and are ready to submit your approval,

3. **Click Unit Approve.**

   3a. Select the department(s) for which you are granting approval
   3b. Optional, enter **Comments**.
   3c. Click **OK**.

If you identify changes that you would like the project team to make,

4. **Click Request Changes.**

   4a. Select the departments on behalf of which you are requesting changes from the project team.
   4b. Optional, enter **Comments**.
   4c. Optional, **Add** Documents. Refer to the *Attach Documents Step by Step Procedure* for more information on working with documents.
   4d. Click **OK**.

Note: Comments entered on this activity are included in the email notification sent to the PI and Primary Research Administrator.
**Assign an Ad Hoc Reviewer**

Based on the information provided in the PAF, the system determines which units the PAF and proposal package should be routed. The Unit Reviewers can send a PAF to a person who has not been previously designated as a Reviewer. Anyone who has an account in the system can be added as an Ad Hoc Reviewer.

**Who Can Assign Ad Hoc Reviewers:** For a department, anyone with **Reviewer** or **Reviewer Who Can Sign** access can assign ad hoc reviewers.

Contact your Research Unit Liaison if you need **Reviewer** or **Reviewer Who Can Sign** access.

**Important Information**

- Ad Hoc Reviewers are given access to view and enter their review comments on the PAF. They are to use the Post Reviewer Comment activity.
- Ad Hoc Reviewers are not able to “approve” the PAF. This remains the responsibility of the Reviewers listed on the PAF.

**PAF Workspace Main tab**

1. Click the **Assign Ad Hoc Reviewer** activity from the PAF Workspace.
Assign Ad Hoc Reviewer window

**Color Elasticity: Blue’s Flexibility Qualities? (09-PAF00109)**

Click the Add button to invite one or more individuals to complete an ad hoc review of this proposal. Each individual will receive an email that includes a link to the study and the comments that you enter below.

To remove an individual from the list, select the checkbox in front of their name and click Remove.

Click OK to complete this activity.

Click CANCEL to cancel this activity and close this window.

2. Click **Add**.

Select One or More Persons window

3. Select the **Filter by** criteria.

   **Note:** **User ID** is the uniqname, **Project ID** is the DRDA (PAF) number.

4. Enter a keyword.

   **Tip:** Use percent sign (%) as a wildcard character in filtering to specify parts of words. For example, searching for %kim% returns Hakim, Kim and Kimball.

5. Click **Go** to display the search results.

6. Click **Advanced** to allow 2 more **Filter by** criteria.

7. Select the Ad Hoc Reviewer you want to assign.

8. Click **OK**.
9. To **Add** additional ad hoc reviewers, repeat steps 3 through 7.

10. Add **Comments**.

⚠️ These comments will be included in the email that is sent from eResearch to each Ad Hoc Reviewer.

11. Click **OK**.
Email sent to Ad Hoc Reviewer

From: eresearch@umich.edu
To: eresearchpm-test@umich.edu
Cc:
Subject: You have been assigned as an Ad Hoc Reviewer on a PAF

---

eResearch Action Required. Please do not reply to this message.

You have been assigned as an Ad Hoc Reviewer on the PAF referenced below.

**Comments:**
Please review the lab space that is allocated to the PI.
It is in your department and I would like you to check on the availability.

**PAF Information:**
DRDA Number: 09-PAF00769
PAF Title: (Marten) Turkish coffee and the effect on bunion reduction in males
PI: Pat Investigator
Other Key Personnel:
Conrad Investigator

Project Administrative Home: 227000 Nuclear Enq & Radiological Scien
Primary Research Administrator: R. Research Administrator

Routed for Unit Review and Approval: 2/3/2009
Direct Sponsor: Department of Energy
Sponsor Deadline: 5/1/2009

---

**Action Required:**
1. Click here to access the PAF: 09-PAF00769
   You may be prompted to login using your uniqname and Kerberos password.
2. Click View PAF Summary to review PAF contents and supporting documents.
3. After review of PAF and proposal, click Post Reviewer Comment.

Notice that comments are included at the beginning of the email. Your comments provide necessary information as to what you need the reviewer to do.

When the ad hoc reviewer clicks on the link to the PAF, the PAF Workspace opens with a limited number of activities that are available to ad hoc reviewers.
Topic 20: Changes After Approval

Goal/outcome:
Identify the impact of changes after you have submitted approval, and take action where needed.

Objectives:
After completing this module, you will be able to:

- Acknowledge a Change.
- Suspend Approval.

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Acknowledge Changes

Acknowledge is used to confirm that you are aware of the PAF changes have been made after your approval, and that you do not wish to suspend your prior approval.

This procedure assumes that you are already logged in to eResearch Proposal Management (eRPM). If you are not familiar with the login procedure, refer to the Login to eResearch Proposal Management Step by Step Procedure.

You will receive an email notification regarding the change only if you have elected to receive notifications. Contact your Unit Liaison regarding your email notification status.

REVIEW CHANGES (PAF Changes Since Approval)

Reviewer Home Workspace Approved tab

1. Click on the PAF Name to open the PAF Workspace.
2. Click the Approved tab.

Note: If you cannot locate the PAF:

- Make sure that you are viewing the correct workspace by looking for the bolded role title under My Roles.
- Make sure that you are on the Approved tab. The Home Workspace defaults to the Inbox tab when opened.
REVIEW CHANGES (PAF Changes Since Approval), CONT.

PAF Workspace Activity History tab

3. Click the Activity History tab and review the sequence of activities following your unit approval.

4. Click Change Log to view the details of the change. Refer to View Details of Changes Step by Step Procedure.

5. Optional, click Display PAF Summary to see the change in the content of the actual PAF.
ACKNOWLEDGE CHANGES

Home Workspace Approved tab

1. Click **Acknowledge**. Notice that the PAF is listed under both organizational headers prior to acknowledging changes.

Acknowledge window

Click OK to indicate acknowledgement of changes made to this project previously approved by your unit. Clicking OK will remove the project from the list of PAFs with Changes Since Approval. Select CANCEL to cancel this activity and keep the project in the list.

This activity does not indicate approval of changes. If you disagree with the changes, use the Suspend Approval activity in the Project Workspace.

2. Click **OK** to indicate acknowledgement of changes. You are acknowledging your awareness of the changes.
ACKNOWLEDGE CHANGES, CONT.

Home Workspace Approved tab

The PAF is now listed once in your Home Workspace under Approved PAFs.
SUSPEND APPROVAL

If changes are made to a PAF after your unit approval or if other circumstances change prior to submission to sponsor, you have an option of “pulling back” your approval by using the Suspend Approval activity.

This procedure assumes that you are already logged in to eResearch Proposal Management (eRPM). If you are not familiar with the login procedure, refer to the Login to eResearch Proposal Management Step by Step Procedure.

Reviewer Home Workspace Approved tab

1. Click the Approved tab in your Home Workspace.
2. Click on the PAF Name to open the PAF Workspace.

**Note:** If you cannot locate the PAF:
- Make sure that you are viewing the correct workspace by looking for the bolded role title under My Roles.
- Make sure that you are on the Approved tab. The Home Workspace defaults to the Inbox tab when opened.
3. Click the **Activity History** tab and review the sequence of activities following your unit approval.

4. Click **Change Log** to view the details of the change. *Refer to View Details of Changes Step by Step Procedure.*

5. Optional, click **Display PAF Summary** to see the change in the context of the actual PAF.
1. Click **Suspend Approval** from the PAF Workspace.
2. Select the department(s) for which you are suspending approval.
3. Optional, enter Comments.
   **Note:** Messages/notes/comments posted are permanent and visible to anyone with access to the PAF.
4. Click OK.

PAF Workspace Routing and Approval Status table

The table for Routing and Approval Status is updated to reflect that approval for the selected department(s) has been changed.

The **Unit Approve** activity is again available to you from the PAF Workspace. Refer to the **Unit Review and Approve Step by Step Procedure** for more information.
Topic 21: eResearch Proposal Management Support and Additional Training

**Goal/outcome:**
The purpose of the module is to make you aware of all the resources available to help you be successful in using eRPM.

**Objectives:**
After completing this module, you will be able to:

- Find additional help and support.
- Find additional training.

**Help & Support:**

- **When to use eRPM or Unit Business Policy/Requirements, contact Your Research Unit Liaison**
  [http://www.mais.umich.edu/groups/liaisonlist.html](http://www.mais.umich.edu/groups/liaisonlist.html)

- **Submission or sponsor specific questions**
  [DRDA Project Representatives](http://www.drda.umich.edu/contacts/drda/staff.html)
  Phone: (734) 764-5500
  Fax: (734) 763-4053, 764-8510

- **Technical support (e.g., navigation, connectivity, and system errors)**
  [ITS (MAIS) Help Desk](mailto:maishelpdesk@umich.edu)
  Phone: 734-936-7000, option 6
  E-mail: maishelpdesk@umich.edu

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<td>Hardship – Reviewer (step by step procedure)</td>
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</tbody>
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System-generated Email Notifications

The eResearch Proposal Management system generates email notifications on certain state transitions and upon the completion of certain events/activities. All email notifications include information about the project and a link to the PAF workspace.

This document provides tips about eRPM email notifications, outlines events that trigger email notification, and provides a short description of the email and its recipients.

Email Configuration

- Add eresearch@umich.edu to your address book/contacts so messages are not sent to junk or spam mail.

⚠️ Warning plain text email system users e.g., Groupwise

- Enable html messages - because eResearch sends html messages.
- You must view as html to view links to PAFs/proposals, award documents.
- If you use Groupwise e-mail, follow the steps below. If you use another e-mail client, contact your system administrator for assistance.
  - To view the current email as HTML, click the message icon at the top of the email.
  - To change all incoming e-mail to HTML:
    1. Go to the Groupwise Main Mailbox.
    2. Select the "Tools" menu.
    3. Select "Options".
    4. Double click "Environment".
    5. Under the "Views" tab:
       Check "Use default views for reading.
       For "Default Read View & Font", select HTML.
    6. Click OK.

⚠️ WARNING! Forwarding an e-mail using a plain text email system breaks links to eResearch system. Instead: go to eRPM and find proposal/project/award.

Tips

- You cannot copy a document link and paste it into a web browser. It will not work.
- Forwarding an e-mail message does NOT give access to eResearch - Person must be listed on the project or be a Reviewer to have access to view proposal/project/award in eResearch.

Who Receives E-mail Notifications?

Based on the situation/event/system activity emails are sent to:

- **UM Principal Investigator & Primary Research Administrator**
  E.g., proposal routed for approval, reviewer requests changes, etc.
  - You cannot turn off the option to send e-mails to a Principal Investigator or Primary Research Administrator.

- **PAF Email Notifier** for each Department
  E.g., this group will get emails when it is their department's turn to review a PAF (instead of sending e-mails to all Reviewers).
  - Reviewers & Unit Liaisons for departments can change/control who is part of this email group for each Dept ID. This does not give Review access for the department. Reviewer or Reviewer Who Can Sign must be set-up separately. Contact your **Unit Liaison** for more information.
<table>
<thead>
<tr>
<th>PAF Event/Activity</th>
<th>&quot;Email Subject Line&quot; and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>When the PAF is Routed for Approval by the UM Principal Investigator or Primary Research Administrator...</td>
<td>“PAF Ready for Unit Review” is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a PAF is ready for their unit review. “PAF Routed for Unit Review” is sent to the Primary Research Administrator and UM Principal Investigator to confirm that the PAF has been routed to the first department(s) for review.</td>
</tr>
<tr>
<td>When Unit Approval is submitted by a department reviewer who can sign...</td>
<td>“Ready for Unit Review and Approval” is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a PAF is ready for their unit review.</td>
</tr>
<tr>
<td>When the Project Team Submits Changes...</td>
<td>&quot;Changes Made to PAF by Project Team&quot; is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been changed. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.</td>
</tr>
<tr>
<td>When a Reviewer Submits Changes...</td>
<td>&quot;Change Made to PAF by Unit Reviewer&quot; is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been changed. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.</td>
</tr>
<tr>
<td>When a Reviewer Requests Changes from the Project Team...</td>
<td>&quot;A Reviewer has Requested Changes to a PAF&quot; is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that there is a request for changes from one of the Reviewers during Unit Review.</td>
</tr>
<tr>
<td>When the Project Team Declines Requested Changes...</td>
<td>&quot;Project Team Decline Requested Changes Activity&quot; is sent to the Reviewer, DRDA staff or Project Representative who requested change to notify that the request has been declined.</td>
</tr>
<tr>
<td>When DRDA Submits Changes to a PAF...</td>
<td>&quot;DRDA Submit Changes Activity&quot; is sent to the Primary Research Administrator, Contact UM Principal Investigator, and the PAF Email Notification contacts for Dept IDs that have already submitted approval of the changes.</td>
</tr>
<tr>
<td>When the PAF is Sent to Project Team for Changes by DRDA...</td>
<td>&quot;DRDA Has Requested Changes to a PAF&quot; is sent to the Primary Research Administrator and Contact UM Principal Investigator of the change request.</td>
</tr>
<tr>
<td>When DRDA Revokes a Change Request...</td>
<td>&quot;DRDA Cancels Change Request&quot; is sent to the Primary Research Administrator and Contact UM Principal Investigator.</td>
</tr>
<tr>
<td>When Requested Action is Declined by DRDA...</td>
<td>&quot;DRDA Has Declined Requested Action&quot; is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that the requested action, typically to put the PAF into an editable state, has been declined.</td>
</tr>
</tbody>
</table>

Last updated: 7/22/09
<table>
<thead>
<tr>
<th>PAF Event/Activity</th>
<th>&quot;Email Subject Line&quot; and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>When Project Team Cancels PAF...</td>
<td>&quot;PAF Cancelled by Project Team&quot; is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been canceled. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.</td>
</tr>
<tr>
<td>When the Project Team requests that DRDA Cancel PAF...</td>
<td>&quot;DRDA Cancel PAF Activity&quot; is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been canceled. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.</td>
</tr>
<tr>
<td>When an Ad Hoc Reviewer is assigned by a department reviewer...</td>
<td>&quot;You have been assigned as an Ad Hoc Reviewer on a PAF&quot; is sent to the assigned individual to notify that they have been added to a PAF as an Ad Hoc Reviewer with view rights and ability to comment.</td>
</tr>
<tr>
<td>When the Post a Comment for the Entire Project activity is used...</td>
<td>&quot;Post a Comment to the Entire Project Activity&quot; sends an email to Individuals selected by the person who posted the comment.</td>
</tr>
<tr>
<td>When an ad hoc reviewer uses Post Reviewer Comment...</td>
<td>&quot;Post Reviewer Comment Activity&quot; sends an email to Individuals selected by the ad hoc reviewer who posted the comment.</td>
</tr>
<tr>
<td>When there is a Change of Conflict of Interest by a UM Principle Investigator...</td>
<td>&quot;Conflict of Interest Information Changed&quot; is sent to the DRDA Project Representative and the PAF Email Notification contacts for Dept IDs that have already submitted approval</td>
</tr>
<tr>
<td>When a PAF is Routed to DRDA...</td>
<td>&quot;PAF Routed to DRDA&quot; is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval, the Primary Research Administrator and Contact UM Principal Investigator to notify that a PAF has been approved by all reviewing departments and has moved to DRDA.</td>
</tr>
<tr>
<td>When a Request for Re-Review is sent by DRDA...</td>
<td>&quot;Request Re-Review Activity&quot; is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF needs to be re-reviewed. The notification is also sent to the Contact UM Principal Investigator.</td>
</tr>
<tr>
<td>When a PAF is in Post-Submission Unit Review</td>
<td>&quot;A Project has moved to state Post-Submission Unit Review&quot; is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a PAF is ready for their unit review.</td>
</tr>
<tr>
<td>When DRDA Sends to Project Team for Submission to Sponsor...</td>
<td>&quot;Proposal Ready for Project Team Submission to Sponsor&quot; is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that DRDA has completed their reviews.</td>
</tr>
<tr>
<td>When a Project is Submitted to Sponsor...</td>
<td>&quot;A Project has been Submitted to its Sponsor&quot; is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval, the Primary Research Administrator and Contact UM Principal Investigator.</td>
</tr>
</tbody>
</table>
### PAF Event/Activity

- **When a project has been in the state of DRDA Approved for longer than 9 days...**
  
  "10 Day Submission Reminder"
  "20 Day Submission Reminder"
  "30 Day Submission Reminder"

  are reminders sent to the Primary Research Administrator and Contact UM Principal Investigator that DRDA is waiting for confirmation of submission to the sponsor.

- **When DRDA Sends a Contract to PI for Signature...**
  
  "Contract Sent for PI Signature" is sent to the Primary Research Administrator and Contact UM Principal Investigator.

- **When DRDA Releases Award Information...**
  
  PAN and PAC notifications are sent to the Contact UM Principal Investigator, Sponsor Principal Investigator, Participating Investigators with Specified Effort, all Administrative Contacts listed on PAF, and the PAN/PAC Notifiers for reviewing departments.

- **When a project is Closed by DRDA...**
  
  "Project Closed" is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that the project has moved to a state of Closed.

- **When DRDA Sends a Notice for Paper Submission...**
  
  "Proposal Received by DRDA" is sent to the Primary Research Administrator and Contact UM Principal Investigator.

- **When DRDA Sends to Project Team for Finalization of the proposal...**
  
  "Project Team Finalize Proposal" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
### Hardship Event/Activity | "Email Subject Line" and Description
--- | ---
When a Hardship Request is **Routed for Approval** by the UM Principal Investigator or Primary Research Administrator... | “Hardship Request Ready for Review” is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a Hardship Request is ready for review.
When Unit Approval has been submitted for a Hardship Request... | “Hardship Request has been Approved” is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When **Unit Denies a Hardship Request**... | “Hardship Request Denied” is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When **DRDA Denies a Hardship Request**... | “Hardship Request Denied by DRDA” is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When **DRDA Cancels a Hardship Request**... | “DRDA has Cancelled a Hardship Request” is sent to the PAF Email Notification contact(s) within the reviewing Dept.ID, Primary Research Administrator and Contact UM Principal Investigator.
When a **Reviewer Requests Changes**... | “Changes Requested for Hardship” is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When **DRDA Requests Changes**... | “DRDA Request Changes to Hardship” is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When **DRDA Routes the Hardship Request for Re-Approval**... | “Hardship Ready for Re-Approval” is sent to the PAF Email Notification contact(s) within the reviewing Dept.ID.
When the Project Team **Submits Changes** requested by a reviewer or by DRDA... | “Hardship Changes have been submitted” is sent to the PAF Email Notification contact(s) within the reviewing Dept.ID.
When the Project Team is notified of Hardship Account Activation... | “A Hardship has been activated” is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When a **Hardship Notification is Released**... | “Release Hardship Notification Activity” is sent to the owning department of the parent proposal/PAF.
Hardship Requests

Hardships need be created, signed by the UM PI & then routed for approval. Hardship review:

- Hardships need to be reviewed by either Administrative Home of a PAF or its parent.
- The Dean’s office is not required to review the Hardship in eRPM. Business policies for individual units may vary.
- Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.

This procedure details how to:

- **Create a New Hardship Request** Page 1
- **UM PI Sign Hardship** Page 4
- **Route Hardship Request for Review** Page 6

Important Information

- Hardships can only be created from the PAF Workspace. The only way to view information about the Hardship is from the PAF Workspace.
- Hardships can be requested in any state except Cancelled, Withdrawn, and Turned Down.
- Only the UM PI, Primary Research Administrator, and Reviewers from the Administrative Home Department can request a hardship.

Create a New Hardship Request

PAF Workspace

1. Using your Home Workspace find the PAF that needs a hardship created.
2. Click the *Hardships* tab on the PAF Workspace.
3. Click *Create New Hardship Request*. 
New Hardship Request

1. **Description**
   - Enter a description of the hardship request.

2. **Justification**
   - Enter a justification for the hardship request.

3. **Proposed Start Date**
   - Enter the proposed start date.

4. **Proposed End Date**
   - Enter the proposed end date.

5. **Itemized Budget**
   - Enter an itemized budget by category, including indirect costs for the time period.
   - Optional, add document(s) that support the itemized budget.

6. **Indirect Cost Rate**
   - Enter the indirect cost rate.

7. **Total Direct Amount Requested**
   - Enter the total direct amount requested.
   - Optional, enter the total indirect amount requested.

8. **Total Amount Requested**
   - The total amount requested will display when the page is saved.

9. **Click Finish** to close page and return to the Hardship Workspace.

**Note:** Save saves page but you do not leave the page.
14. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

**TIP:** To notify the PI that the hardship request is ready for PI signature, you could use the activity **Post a Comment for the Entire Project** from the PAF Workspace. Be sure to select the PI as an email recipient.

**PAF Workspace**

15. Since a hardship has been created for the PAF, a message displays on the PAF Workspace.
PI Sign Hardship

PI signature is required in order to route the hardship request for unit review.

Hardship Workspace

1. Click the **Sign Hardship** activity from the Hardship workspace.

Sign Hardship Activity Window

**Beginning To End (09-PAF00579)**

By selecting Sign the Hardship and clicking OK, the undersigned certify, to the best of their knowledge and belief, that no Federal appropriated funds have been or will be paid to influence or attempt to influence the granting of this award. We certify the proposed work is consistent with University unit objectives and all faculty involved in the proposal have agreed to participate. We accept the obligations and commitments described, and agree to perform the work in accordance with University and sponsor policies.

Additional certification for DHHS funds: The PI assures that (1) that the information submitted within the application is true, complete, and accurate to the best of the PI’s knowledge, (2) that any false, fictitious, or fraudulent statements or claims may subject the PI to criminal, civil, or administrative penalties; and (3) that the PI agrees to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of the application.

**Sign the Hardship:**

2. Select **Sign the Hardship**.
3. Click **OK**.

**Recent Activity**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Author</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hardship Signed</td>
<td>Inez Investigator</td>
<td>05/10/2009 10:44 AM EDT</td>
</tr>
</tbody>
</table>

4. The Sign Hardship activity is recorded in Recent Activity on the PAF Workspace.
Hardship Workspace

5. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.
Route Hardship Request for Review

Hardship Workspace

1. Click the **Route Hardship Request for Review** activity from the Hardship workspace.

   **Note:** The Hardship Workspace is accessed by clicking on the Hardship tab on the PAF Workspace.

   **Route Hardship Request for Review Activity Window**

   2. Optional, enter **Comments**. These comments are permanent and cannot be changed. They will be displayed in Recent Activity on the PAF Workspace.

   3. Click **OK** to send the hardship to the

      **Note:** An email notification, which includes your comments, is sent to the PAF email notification contact(s) in the requesting department after you click OK to complete this activity.

4. The hardship request moves to the state of **Unit Reviewing Hardship Request** and the **Route Hardship Request for Review** activity is recorded in **Recent Activity** on the PAF Workspace.

5. Click the name of the PAF in the breadcrumb trail navigation to exit the Hardship Workspace and return to the PAF Workspace.
Unit Review and Approve Hardship Request

- **Hardship Requestors:**
  Hardships can only be requested by the UM PI, Primary Research Administrator, and Reviewers from the Administrative Home Department.

- **Hardship Reviewers:**
  - Hardships need to be reviewed by either Administrative Home of a PAF or its parent.
  - The Dean’s office is not required to review the Hardship in eRPM. Business policies for individual units may vary.
  - Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.

This procedure details how to:

- **Open a Hardship Workspace**  
  Page 1

- **Review and approve a hardship request**  
  Page 2

- **Deny or cancel a hardship request**  
  Page 5

- **Request changes**  
  Page 6

- **Post a comment on a Hardship Workspace**  
  Page 7

Open Hardship Workspace

**PAF Workspace**

1. Click the **Hardships** tab on the PAF Workspace.
2. Click the **Name** of the hardship.
Review and Approve Hardship Request

Hardship Workspace

3. Click View Hardship Request.

Hardship Request View

The Hardship Request is a one page view with links to attachments if any were uploaded.

4. Click Exit or Finish to close the view and return to the Hardship Workspace.
5. Click the **Unit Approve Hardship Request** activity from the Hardship Workspace.

### Unit Approve Hardship Request

5. Click **Approve Hardship Request**.

**Important!**
- Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.
- The Dean’s office is not required to review the Hardship in eRPM. Business policies for individual units may vary.

6. Optional, enter **Comments**. These comments will be displayed in Recent Activity on the PAF Workspace.

8. Click **OK**.

**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.
9. The hardship request moves to the state of DRDA Reviewing Hardship Request and the Unit Approved Hardship Request activity is recorded in Recent Activity on the PAF Workspace.

Note: Once the hardship request is approved, the activities to deny, cancel and request changes are no longer available.

10. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.
After reviewing the Hardship Request,

1. Click either the **Cancel Hardship Request** or **Unit Deny Hardship Request** activity from the Hardship Workspace. The activity window that appears works the same for both activities.

**Unit Deny Hardship Request Activity Window**

1. Enter **Comments** regarding your decision. These comments will be displayed in Recent Activity on the PAF Workspace.

2. Click **OK**.

**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.

The hardship request moves to the state of either Hardship Request Denied or Hardship Request Cancelled and the activity is recorded in Recent Activity on the PAF Workspace.

4. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.
Reviewer Request Changes

Hardship Workspace

After reviewing the Hardship Request,

1. Click the **Reviewer Request Changes** activity from the Hardship Workspace.

Reviewer Request Changes Activity Window

2. Enter **Comments** describing the change you are requesting.

3. Optional, **Add** Documents.

4. Click **OK**.

**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.

The hardship request moves to the state **Unit Reviewer Requests Hardship Changes** and the activity is recorded in **Recent Activity** on the PAF Workspace.

5. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.
Post a Comment

Hardship Workspace

1. Click the Post a Comment activity from the Hardship Workspace.

Post a Comment Activity Window

2. Enter Comments. These comments will be displayed in Recent Activity on the PAF Workspace.
3. Click OK.