Research Unit Liaison Meeting

June 2, 2009
3:00 – 4:30 pm

Kipke Conference Center
● eRPM Update
● What’s New
● Finalize Proposal
● Email Notifications
● Blue Pages Feed from eRPM
● Creation of PAF ID (Pre-proposal Versus Full Proposal)
● Future Meetings
eRPM Update

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<tr>
<th>Aug 08</th>
<th>Sept 08</th>
<th>Oct 08</th>
<th>Nov 08</th>
<th>Dec 08</th>
<th>Jan 09</th>
<th>Feb 09</th>
<th>March 09</th>
<th>April 09</th>
<th>May 09</th>
<th>June 09</th>
<th>July 09</th>
<th>August 09</th>
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<tr>
<td>Testing</td>
<td></td>
<td>Pilot</td>
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<td>Starting 3/30/09 All Campus Release</td>
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- **Unit eRPM required dates:**
  - [http://www.umich.edu/~eresinfo/erpm/docs/eRPM_unitdates_web.pdf](http://www.umich.edu/~eresinfo/erpm/docs/eRPM_unitdates_web.pdf)

- **Proposed dates to require eRPM**
  - Retire paper ePAF end of the day on June 30
    - i.e., the link to that site will be eliminated by DRDA as will access to that cache of old ePAFs
  - All PAFs initiated on or after July 1, must be created in eRPM
  - PAFs initiated in paper form before June 30 will be honored and processed by DRDA through the end of July
  - No paper PAFs will be accepted by DRDA effective August 1.
Enhancements communicated using eRPM Home Workspaces
- Posted in yellow Announcement box
- Link to full details
- To view all changes, click on “What’s New” in the upper navigation or go to:
  http://www.umich.edu/~eresinfo/erpm/releases/releasenotes.html
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 is finalized and ready for submission
  - Who is expected to submit the proposal
  - A common location for the final proposal documents
Finalize Proposal – Home Workspace

- Proposals need to be finalized before:
  - DRDA can submit to sponsor
  - Project Team Can Log Sponsor Submission

- After a proposal is routed for approval, a message appears on PAF workspace that notes if proposal is Finalized or is Not Finalized.
How to Finalize Proposal

- PI/Project Team can indicate final proposal documents are ready from the PAF Worksheet when completing the PAF.
- Answer Yes to question 5.17
Or PI/Project Team can finalize after PAF Routed for Approval using Manage Data - Finalize Proposal for DRDA
• DRDA PAF review is complete
• Submission Instructions indicate that DRDA will submit the proposal
• And, the proposal is 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
1. Click Manage Data - Finalize Proposal for DRDA.
2. Indicate for DRDA that the proposal is final & ready to be submitted.
3. Upload a copy of proposal for DRDA to submit. ! Make sure to click Attach.
4. Click OK.
1. Click Manage Data - Finalize Proposal for DRDA

2. Indicate for DRDA that proposal is final & ready to be submitted.
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 procedure”
     http://www.umich.edu/~eresinfo/erpm/docs/PM_GrantsGov.pdf

4. Click OK.
● DRDA PAF review is complete
● 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
  – Must Finalize the proposal before the submission can be logged
● The PAF will be in the state: Project Team Submission to Sponsor
1. Click Manage Data - Finalize Proposal for DRDA
2. Indicate that proposal is final & ready to be submitted.
3. Upload a copy of the proposal to keep a historical record.
4. Click OK.
5. Project Team Can Then Log Submission.

Directions:
http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_LogSubmission_SS.pdf
1. Click Manage Data - Finalize Proposal for DRDA
2. Indicate that the proposal is final & ready to be submitted.
3. Indicate that the proposal has been uploaded to sponsor system.
4. Click OK.
All finalized proposals appear in the “Finalized Proposals” tab in the Home Workspace for the PI & Project Team.
All email notifications include information about the project and a link to the PAF workspace.

When email is sent & who receives the email depends on the system activity/event:

- PI & Primary Research Administrator
  e.g., Confirmation PAF Routed for Approval
- PAF Email Notification Contact
  e.g., PAF Ready for Approval
- Individuals selected from eRPM
  e.g., Post a Comment to ask PI to Sign PAF/Conflict of Interest Statement
- PAN/PAC Email Notification Contacts
  e.g., PAN, PAC
Email Notifications Sent To

- Principal Investigator & Primary Research Administrator
  - E.g., confirmation that PAF routed for approval, reviewer requests changes, etc.
  - You cannot turn off the option to send emails to a Principal Investigator or Primary Research Administrator.
PAF Email Notification for each Department

- E.g., instead of sending emails to all Reviewers, this group will get emails when it is their department's turn to review a PAF (Pending Displays by Department Name in the Routing Table).
- Reviewers & Unit Liaisons for departments can change/control who is part of this email group for each Dept ID.
  
  http://www.umich.edu/~eresinfo/erpm/docs/PM_UL_manageaccess_SS.pdf

- Does not give Review access for the department. Reviewer or Reviewer Who Can Sign must be set-up separately.
● Selected individual using Post a Comment for the Entire Project Team
  - E.g., use system to send an email to UM PI to ask them to sign PAF/Conflict of Interest Statement

![Image of Post a Comment for the Entire Project](image)
Email Notifications Sent To

- PANs & PACs sent to PAN/PAC Email Notification for a unit (department) that was required to review the PAF and
  - Principal Investigator
  - Sponsor Principal Investigator
  - Participating Investigators with Specified Effort
  - Administrative Contacts (all administrators listed on proposal or project)

- Reviewers & Unit Liaisons for departments can change/control who is part of this PAN/PAC email group for each Dept ID.
  [http://www.umich.edu/~eresinfo/erpm/docs/PM_UL_manageaccess_SS.pdf](http://www.umich.edu/~eresinfo/erpm/docs/PM_UL_manageaccess_SS.pdf)

- Does not give Review access for the department. Reviewer or Reviewer Who Can Sign must be set-up separately.

PAN/PAC Email Notification:

<table>
<thead>
<tr>
<th>Person</th>
<th>Employer</th>
<th>Title</th>
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<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>
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Email Notification Resources

- New web page with email tips:
  http://www.umich.edu/~eresinfo/erpm/start/config_email.html

- Learn more about:
  - Events/activities that trigger email notification
  - Short description of the email
  - Email recipients
  http://www.umich.edu/~eresinfo/erpm/docs/Email_Notifications.pdf
Blue Pages - Administrators Listings
http://cgi.research.umich.edu/web_bluepages/
Updated on a nightly basis from eResearch Proposal Management – Contact for Proposal Questions for a Department
● Reviewers or Unit Liaisons update – Contact for Proposal Questions for a Department via Manage Department Pages

● Directions

http://www.umich.edu/~eresinfo/erpm/docs/PM_UL_manageaccess_SS.pdf

Address information comes from M-Pathways HR System.

To update work address, see:
http://askhr.umich.edu/entry/129/
● PAF Question 1.4 determines the format of the PAF ID

● Yes = Pre-proposal FY-PRE12345 e.g., 09-PRE12345

● No = Proposal FY-PAF12345 e.g., 09-PAF12345

● Cannot change the PAF ID after you create the PAF

● Changing this question does not change the PAF ID
eRPM Help/Support

- Questions about when to use eRPM or Unit Business Policy/Requirements
  
  **Research Unit Liaison**

- Technical support (e.g., navigation, connectivity, and system errors)
  
  **MAIS Help Desk**
  Phone: 734-936-7000, option 6
  E-mail: maishelpdesk@umich.edu

- Submission or sponsor specific questions
  
  **DRDA Project Representatives**
  Phone: (734) 764-5500
  Fax: (734) 763-4053, 764-8510
● Research Unit Liaison Meeting
  – September 15, 2009
    ● Time: 3:00 - 4:30 pm
    ● Location: 2029 Kipke Conference Center