Welcome to the eResearch Proposal Management instructor-led course.
Getting Started

- Housekeeping
- You should have....
- Prerequisite for this class
- Classroom guidelines
- Please introduce yourself
Please note:

You must **sign-in** to get credit for this class.
Course Wrapper

• Open My LINC, search on eRPM.
• Links to step-by-step and scenario documents, practice sims, course evaluation, and sandbox
• eRPM training page will have link to this course wrapper.
Getting to know you

• How many years have you been doing research administration?
• How many proposals have you written or submitted?
• Do we have any Principal Investigators (PIs) in the room?
Review of PAF online course
PAF Online Course

• It’s a **prerequisite** for this course.
• Review questions:
  1. What is a PAF?
  2. What’s the difference between a PAF and a proposal?
  3. What is the role of the UM Principal Investigator?
  4. Where would you go to see a list of all your proposals?
PAF Online Course

- How many of you completed a PAF as part of the online course?
- Any particular trouble spots?
- Any questions/areas you want us to cover today?
Course Agenda

Intro and review of online course
Mod. 1: Grants.gov, Part 1
Mod. 2: Grants.gov, Part 2
Mod. 3: Getting to Submitted to Sponsor State
Mod. 4: Managing the Process
Mod. 5: After Submitted to Sponsor
Course Summary

Total time: 4 hrs.
You will learn to:

• Create a PAF for a Grants.gov opportunity
• Locate and use the Grants.gov forms in eRPM
• Determine whether to use system-to-system or Adobe for electronic submission
• Copy PAF information into Grants.gov
You will learn to:

- Validate your submission
- Do a submission pre-check
- Generate a PDF version of the application
- Make changes when the PAF is in Unit Review
- Clone, relate, and cancel PAFs
- Request a hardship
You will learn to:

• Add or remove administrative personnel
• Identify the necessary documents and steps to finalize a proposal
• Determine when to Request ORSP Action versus Post a Comment
• Locate an Award from the PAF Workspace
Module 1:
Grants.gov, Part One
In this module, you will learn:

Steps for preparing and submitting a Grants.gov proposal to ORSP including:

• When to submit via eRPM vs. Adobe
• When you can use copy-map to copy information from PAF to Grants.gov forms
In this module, you will learn:

- Location and use of appropriate Grants.gov forms
- How to complete a PAF in eRPM for Grants.gov opportunity
Overview

High-Level Proposal States

Excludes Proposal Changes

State
Location of where the proposal is in the process.

* Composed of more detailed states.
What is Grants.gov and why do we spend so much time on it in class?

- **Grants.gov**: website used by all Federal sponsors to announce new research opportunities.

- In Fiscal Year 2016:
  - 85% of externally funded, U-M research expenditures were from Federal sponsors.
  - 25% of U-M proposals were submitted electronically to Federal sponsors via Grants.gov System-to-System transmission.
Grants.gov website

• Used when Federal agency is the **direct sponsor**
• Opportunity **may** allow for electronic (system-to-system) submission, which has several advantages
Grants.gov

- Involves PAF (internal) plus Grants.gov forms.
- SF424—set of Federal application forms used to apply for Federal grants and contracts. We support as many as we can.
- eRPM system tells you if form is supported.
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 Grants.gov forms
2. Copy PAF Info to Grants.gov form set
3. Complete Grants.gov forms
4. Validate (Required fields validation)
5. Submission Pre-Check (Grants.gov validation)
6. Generate PDF Version
7. Finalize Grants.gov forms for ORSP submission
Grants.gov finder

- You can use Grants.gov to retrieve the FOA number before opening the PAF or from the PAF.

- Option: subscribe to updates.
Step 1 – PAF worksheet – Grants.gov submissions
Enter the FOA # and click **Find...** to associate Grants.gov forms with PAF.

If no results, return to Grants.gov to determine:

- Typo?
- FOA unavailable for electronic submission?

If you don’t know the FOA #, can use Grants.gov Finder, then return to PAF.

This screen displays next because you said yes to “Grants.gov opportunity?”
Step 1 – PAF worksheet – Grants.gov submissions

Check if forms are:
- Supported (available in eRPM)
- Copy Map Supported (data can be copied from PAF to Grants.gov forms)

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

If all the forms you need are NOT supported:

• Download Adobe package from Grants.gov, fill out forms in Adobe Reader.

• Adobe package is uploaded into PAF as attachment. ORSP submits.
eResearch Submission vs. Adobe

Advantages of eResearch (system-to-system) submission:

• Faster submission
• Few submission errors
• Better error checking, faster correction process
• Option to copy map from PAF to Grants.gov forms
Can you copy PAF info to Grants.gov?

- **Copy map** function transfers your data from the PAF—as well as standard U-M info— to FOA forms.
  - A time-saver for you!
  - Only available for system-to-system submission (from eRPM)
  - Not all forms supported by vendor are **copy map** supported
Exercise

Continue creating a new PAF for a Grants.gov opportunity.

• Refer to scenario, Part 2.
• Navigate to Sponsor section under General Information.
Tip:
You must check **eResearch submission to Grants.gov** in Question 5.16 in PAF to get the Grants.gov forms link in PAF Workspace. *(Frequently-asked question)*
Module 1 Review

1. What is the submission status of your PAF?
2. How would you decide whether to do a system-to-system submission or use Adobe?
3. If all of your forms are supported but some are not copy map supported, can you do a system-to-system submission?
4. “I can’t see the Grants.gov link in the PAF workspace, even though I selected an FOA in the PAF. Where is it??”
Module 2: Grants.gov, Part Two
In this module, you will learn to:

Identify the steps to complete and validate a Grants.gov system-to-system application in eRPM, including:

- Copy map
- Navigate and fill out Grants.gov forms
- Validate submission
- Do a submission pre-check
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 Grants.gov forms
2. Copy PAF Info to Grants.gov form set
3. Complete Grants.gov forms
4. Validate (Required fields validation)
5. Submission Pre-Check (Grants.gov validation)
6. Generate PDF Version
7. Finalize Grants.gov forms for ORSP submission
Using Copy Map

- Complete PAF before Grants.gov forms. If you copy map a second time, may write over data entered in Grants.gov.
- Copying is one-way, from PAF to Grants.gov forms. Changes in Grants.gov forms are not transferred to PAF.
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 Grants.gov forms
2. Copy PAF Info to Grants.gov form set
3. Complete Grants.gov forms
4. Validate (Required fields validation)
5. Submission Pre-Check (Grants.gov validation)
6. Generate PDF Version
7. Finalize Grants.gov forms for ORSP submission
Grants.gov Forms

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

Click the Parent Project link to return to the PAF Workspace
Edit Grants.gov Forms

Grants.gov Navigation

Select optional forms
Use Jump To as workaround if you haven’t completed required fields on a page.
**Tip**

- When you copy map, faculty *Position/Title* (which comes from U-M HR) is always too long for Grants.gov forms.
- Shorten title to avoid error message. It appears multiple places.

> The value "Daniel Katz Distinguished University Professor of Psychology, Professor of Psychology, College of LSA, Research Professor, Research Ctr for Group Title Dynamics and Director, Institute for Social Research" has a length of 199 which exceeds the character limit of 45 for this field.
Tip: If you see this error, start hunting for spaces in Middle Name!

Senior/Key Person data was copied from the PAF, then erased. A space for the Middle Name in line 2 triggers the errors below.
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 Grants.gov forms

2. Copy PAF Info to Grants.gov form set

3. Complete Grants.gov forms

4. Validate (Required fields validation)

5. Submission Pre-Check (Grants.gov validation)

6. Generate PDF Version

7. Finalize Grants.gov forms for ORSP submission
Validate Submission

- Run after you complete Grants.gov forms
- Checks for errors—completion of required fields
- Fix errors, then refresh
- Must validate before you run submission pre-check
Validate Submission checks that all fields required to save are completed.
<table>
<thead>
<tr>
<th>Message</th>
<th>Field Name</th>
<th>Jump To</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is a required field; therefore, you must provide a response.</td>
<td>AbstractAttachments</td>
<td>SF424 R&amp;R Other Project Information</td>
</tr>
<tr>
<td>This is a required field; therefore, you must provide a response.</td>
<td>ProgramIncome</td>
<td>PHS 398 Checklist - P2</td>
</tr>
<tr>
<td>The Public Health Relevance Statement (labeled ‘Project Narrative’ in Other Project Information, item 7) must be included. (OPI_10583)</td>
<td>7. Project Narrative</td>
<td>SF424 R&amp;R Other Project Information</td>
</tr>
<tr>
<td>The Research Design and Methods section of the Research Plan must be attached to the application. (RP_10210)</td>
<td>2. Research Plan Attachments: 5. Research Design and Methods</td>
<td>PHS 398 Research Plan</td>
</tr>
<tr>
<td>The Senior/Key Person Biosketch for the PD/PI, is longer than four pages. (SKP_10350_V2)</td>
<td>PD/PI Profile, Biographical Sketch</td>
<td>SF424 R&amp;R Senior/Key Person(s) (V1.1)</td>
</tr>
<tr>
<td>In most cases, a Bibliography and References Cited attachment should be included. (OPI_10586)</td>
<td>8. Bibliography &amp; References</td>
<td>SF424 R&amp;R Other Project Information</td>
</tr>
</tbody>
</table>

Fix any errors & refresh list until successful.
Successful validation.

All fields required to Save completed.
Status = Valid for Submission

View only

Can reopen & edit, but must Validate again.

Logged who & when activity completed.
Validate Submission

• If sponsoring agency asks you to do something counter to submission validation rules, may need to contact project representative (PR).
• If technical issues, contact ITS Service Center.
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 Grants.gov forms

2. Copy PAF Info to Grants.gov form set

3. Complete Grants.gov forms

4. Validate (Required fields validation)

5. Submission Pre-Check (Grants.gov validation)

6. Generate PDF Version

7. Finalize Grants.gov forms for ORSP submission
Submission Pre-Check

- Validates your data against Grants.gov validation rules.
- Please don’t wait until the last minute!

Status must be Valid for Submission

Checks Grants.gov validation rules
If confusing errors like these are returned, contact ITS Service Center. After errors are corrected, re-validate, run Submission Pre-Check again.
Submission Pre-Check - Success

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

For example, some sponsors require that all attached documents must be PDFs.

Submission Pre-Check
Grants.gov validation results

Generated Grants Xml File is valid.
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 Grants.gov forms
2. Copy PAF Info to Grants.gov form set
3. Complete Grants.gov forms
4. Validate (Required fields validation)
5. Submission Pre-Check (Grants.gov validation)
6. Generate PDF Version
7. Finalize Grants.gov forms for ORSP submission
Generate PDF (optional)

- Used to review data and attachments.
- This is eRPM “best guess” of what review agency will see.

Click Generate PDF Version

Status = Valid for Submission
Generate PDF

Turn on checkbox to include attachments, and then click **OK**.
Generate PDF

Can View the PDF from the Grants.gov Workspace.

Logs the PDF generated & who generated it.
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.
## Module 2 Review

1. What’s the correct sequence?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Validate submission</td>
</tr>
<tr>
<td>b.</td>
<td>Submission Pre-check</td>
</tr>
<tr>
<td>c.</td>
<td>Complete PAF</td>
</tr>
<tr>
<td>d.</td>
<td>Finalize for ORSP submission to sponsor</td>
</tr>
<tr>
<td>e.</td>
<td>Copy PAF info to Grants.gov forms</td>
</tr>
<tr>
<td>f.</td>
<td>Complete Grants.gov forms</td>
</tr>
</tbody>
</table>
Module 2 Review

2. What’s the difference between Validate Submission and Submission Pre-Check?

3. Why would I run the activity Copy PAF information to Grants.gov forms? What’s the advantage of doing this?

Note: The remaining modules apply to all proposals, not just Grants.gov.
Module 3:
Getting to the “Submitted to Sponsor” State
In this module, you will learn:

• What happens between the Principal Investigator (PI)/Project Team (PT) Routes for Approval and Submitted to Sponsor states
• The documents and steps needed to finalize a proposal
• The importance of clear, detailed submission instructions
In this module, you will learn:

- The two-step process for making changes after routing
- How to view details of a change
- When to replace an existing document and when to upload a new one
eRPM System Workflow

High-Level Proposal States

1. Research Administrator
2. Units
3. ORSP
4. Sponsor

State
Location of where the proposal is in the process.

* Composed of more detailed

Awarded*
Active State
Active Project

Submission to Sponsor*
Sponsor turns down proposal.
Finalizing Proposals

- A PI can complete proposal while the PAF is being routed for approval.
- PAFs can be routed concurrent with or before proposal completion.
- Steps in eRPM accommodate this process.
Finalizing Proposals

- Two ways of finalizing in eRPM:
  - Prior to routing the PAF
    - Answer **Yes** to PAF question 5.17 if proposal is complete and ready for submission (or doesn’t need submission).
  - During Unit Review
    - Use activity **Finalize for Submission to Sponsor**.
Finalizing Proposals – from the PAF worksheet

1. In 6.1 Final Documents for Submission, attach 1 PDF of FINAL sponsor-required documents.

   For Non-Federal Direct Sponsor, PDF should include:
   - Statement of Work/Abstract
   - Budget
   - Budget Justification

Do NOT upload internal review documents in 6.1.
1. In **6.1 Final Documents for Submission**, attach 1 PDF of FINAL sponsor-required documents.

For **Federal Direct Sponsor**, attach 1 PDF.
- Grants.gov via Adobe--Attach 1 PDF.
- Grants.Gov in eResearch--Do not attach a document, but Grants.gov application must be validated.
Finalizing Proposals – from the PAF Worksheet


- For Federal Direct Sponsor, attach ORSP Administrative Shell:
  - Sponsor Forms
  - Budget
  - Budget Justification
  - Abstract or Draft of Proposal Text

- For Non-Federal Direct Sponsor, attach
  - Draft Contract
  - Internal Budgets
  - Other draft documents

Do NOT upload the Final Proposal documents here.
From Proposal Prep to Unit Review

• **Route for Approval** activity validates necessary fields are complete.
• PAF "automatically" moves to Unit Review state.
• Email sent to PI and Primary Research Administrator.
• First set of reviewers gets email, PAF shows up in their workspace inbox.

![Example Image](image.png)
eRPM Workflow: Unit Review state

- Reviewers determined from PAF information.
- System determines order of review.

![Routing and Approval Status Table]

<table>
<thead>
<tr>
<th>Department</th>
<th>Department ID</th>
<th>Approved?</th>
<th>Date Approved</th>
<th>Approval Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obstetrics and Gynecology Dept</td>
<td>247000</td>
<td></td>
<td></td>
<td>No Approval Required</td>
</tr>
<tr>
<td>Dbn CASL College-Wide Programs</td>
<td>921100</td>
<td>yes</td>
<td>5/22/2017 4:02 PM</td>
<td></td>
</tr>
<tr>
<td>Obstetrics &amp; Gynecology RollUp</td>
<td>246999</td>
<td>no</td>
<td></td>
<td>Pending</td>
</tr>
<tr>
<td>Dbn Col of Arts, Sci &amp; Letters</td>
<td>921000</td>
<td>yes</td>
<td>5/22/2017 4:02 PM</td>
<td></td>
</tr>
<tr>
<td>Dbn Research &amp; Spons Programs</td>
<td>916400</td>
<td>yes</td>
<td>5/22/2017 6:44 PM</td>
<td></td>
</tr>
<tr>
<td>Medical School</td>
<td>230000</td>
<td>no</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

![ORSP Approval Status Table]

<table>
<thead>
<tr>
<th>ORSP Approval</th>
<th>Approved?</th>
<th>Date Approved</th>
<th>Approval Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Check</td>
<td>no</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Representative</td>
<td>no</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signing Officer</td>
<td>no</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
eRPM Workflow: Unit Review state

- If your PAF is stuck...

- When all departments have completed review, PAF moves to ORSP Review state.
Activities available to Principal Investigator/Project Team during **Unit Review**

- Finalize Proposal
- Make and submit changes (e.g., to correct mistake)
- Decline (requested) changes
- Cancel PAF
- Clone/Relate PAF
- Manage Administrative Personnel
Finalize Proposal for Submission in Unit Review State

- Click **Finalize for Submission to Sponsor** to notify ORSP that proposal is final and ready for submission.
- *Grants.gov application must be valid for submission to finalize.
Finalize Proposal for Submission

Check box indicates the document or electronic file (e.g., Grants.gov application or NSF application in Fastlane) is ready for submission.

Final document is uploaded, if applicable.
Proposal is Finalized for Submission
Making Changes
After Routed for Approval

- Make and submit PAF changes (two-step process)
- Working with documents (new version vs. replacement)
Making Changes to a PAF in Unit Review

Two-step process:

• Select **Project Team Make Changes** activity
• Make the necessary changes
• Select **Project Team Submit Changes** activity to return the PAF to **Unit Review** state.

Practice simulation:
**Make Changes to a PAF in Unit Review**
Change Log

• In PAF Workspace under **Change Tracking** (in any state but Proposal Prep)
• Click **Change Log** to see details (compare new values with old)

<table>
<thead>
<tr>
<th>Main</th>
<th>Contacts</th>
<th>Change Tracking</th>
<th>Activity History</th>
<th>Attachments</th>
<th>Hardships</th>
<th>Subcontracts</th>
<th>Unit Comments</th>
</tr>
</thead>
</table>

**Title:**
Test

**Change Log**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Author</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Log: Award Information - Main</td>
<td>Jones, Jo</td>
<td>4/27/2017 9:57 AM</td>
</tr>
<tr>
<td>Change Log: Award Information - Manage Notices</td>
<td>Jones, Jo</td>
<td>4/27/2017 9:56 AM</td>
</tr>
<tr>
<td>Change Log: Award Information - Commitment</td>
<td>Jones, Jo</td>
<td>4/27/2017 9:56 AM</td>
</tr>
</tbody>
</table>
# Change Log

Author: Jo Jones  
Logged For (PAF): Test  
Activity Date: 4/27/2017 9:57 AM

<table>
<thead>
<tr>
<th>Property Changes</th>
<th>Documents</th>
<th>Notifications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Property</strong></td>
<td><strong>Old Value</strong></td>
<td><strong>New Value</strong></td>
</tr>
<tr>
<td>PAF</td>
<td>14-PAF07717</td>
<td>_ProPack_Change Log</td>
</tr>
<tr>
<td>activityType</td>
<td></td>
<td></td>
</tr>
<tr>
<td>author</td>
<td></td>
<td>Jo Jones</td>
</tr>
<tr>
<td>name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAF Award Information.CFDA Number</td>
<td>Removed elements:</td>
<td>Added elements:</td>
</tr>
</tbody>
</table>
|                 |           | • ID00359184 | • ID00359183  
|                 |           |               | • ID00359184  
| PAF Award Information.CFDA Number(ID00359183).CFDA Description | | ID1.396 |
Options for Working with Documents

• Upload a **new document**
• Upload a **new version** of a previously posted document
• **Delete** a previously uploaded document

*When should I replace versus upload a new version?*
Upload a new version of the document:

- If it’s a new version of an existing document (e.g., Budget Justification).
- If you want reviewers or PR to see what changed from previous version.

When you upload a new version, the system provides links to previous versions.
Upload a new document:

- If it is a different type of document (e.g. abstract vs. a budget justification)
- If the uploaded documents should be viewed individually.
It’s OK to delete an uploaded document:

• If it’s early in the process and a reviewer or PR hasn’t reviewed the PAF yet.
• If the document was a “placeholder” and not the version that should be routed.
Submission instructions

ORSP submits over 6,000 proposals per year! Provide unique, clear instructions to make sure they do yours correctly.

- Enter in PAF under **Routing Instructions, Section 5**.
- After route for approval, can edit under **Manage Data > Submission Instructions** in PAF Workspace.
Clear submission instructions for ORSP

Instruct ORSP:

• Which documents to submit to PT for inclusion in proposal submission
• Proposal delivery/routing contact information
• Whether ORSP is to provide a contract
• Are notes related to award or to final proposal submission?

Don’t say “same as last time”!
• The PAF moves to ORSP Review state.
• New rules for making changes!
eRPM Workflow: ORSP Review states

Four states:

• Administrative Review
• Project Representative Review
• Signing Officer Review
• ORSP Approval
Module 3 Review

1. When would you replace a document rather than uploading a new document?

2. What happens if you make changes to a PAF in Unit Review but don’t run the Project Team Submit Changes activity?

3. Why is it important to provide clear submission instructions for ORSP?
Module 4: Managing the Process
In this module, you will learn to:

- Find PAFs using the search feature and All PAFs
- Add or remove administrative personnel
- Determine when and how to clone, relate, and cancel a PAF
Navigating in eRPM

- Home Workspace review
- Search feature
- All PAFs
# Home Workspace Review

## PAFs with Required Action

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Date Modified</th>
<th>State</th>
<th>PI</th>
<th>Dept</th>
<th>PAF Sponsor Deadline</th>
<th>Sponsor</th>
<th>AAR Deadline</th>
<th>Finalized?</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-PAF01902</td>
<td>Community Action to Promote Healthy Environments</td>
<td>9/7/2018 11:38 AM</td>
<td>Proposal Preparation</td>
<td>Principal School of Public Health</td>
<td>9/15/2015</td>
<td>Wayne State University</td>
<td>no</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17-PAF07446</td>
<td>M-HEART: Mapping Hotspots of Exposure and Rinks to Translate research into action</td>
<td>5/2/2017 2:12 PM</td>
<td>Proposal Preparation</td>
<td>Principal Biostatistics Department</td>
<td>6/5/2017</td>
<td>NIH</td>
<td>no</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2 Items

## Hardships with Required Action

No data to display.

## PAFs Not Yet Signed by PI

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Date Modified</th>
<th>State</th>
<th>PI</th>
<th>Dept</th>
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</tbody>
</table>

1 Items

## PAFs Requiring Export Control Details
Search Feature

Search for PAFs where you are listed as PI/PT or Reviewer.

- Click **Search** from Home Workspace.
- Select PI/Project Team or Reviewer.
- Enter search criteria.
- Click **Search**.
- Click PAF name in search results.
Tip: When the browser is spinning, the system is working. Best to let it finish rather than clicking again.
All PAFs

- Displays a list of all PAFs/proposals/projects that you have permission to view or edit.
- You can **Filter by** criteria (state, name, etc.)
Activities available to Principal Investigator/Project Team

• Finalize Proposal
• Make and submit changes (e.g., to correct mistake)
• Decline (requested) changes

• Manage Administrative Personnel
• Cancel PAF
• Clone/Relate PAF
Add or Remove Administrative Personnel

- Please keep this information current!
- Don’t have to go through 2-step make/submit changes process.
- If you’re making major changes, like someone leaves department, can request batch change via ITS Service Center.

Practice simulation: Adding Administrative Personnel
Cloning, Relating, and Canceling PAFs
Cloning and Relating PAFs

- You can clone a PAF from any state in eRPM.
- Use cloning to make templates.
Relate a PAF when cloning:

For instance:

- If this is a re-submit, relate the PAF so that success statistics are more accurate.
- If a pre-proposal turns into an invitation, show relationship between the pre- and full proposal.

Cloned PAF is related to original by default unless you select **New** as the cloning type.
Cancelling a PAF

- The UM PI and PRA can cancel a PAF.
- In some states, only ORSP can cancel the PAF.
- Cancelling pulls it out of your Inbox.
- Let’s cancel our PAF in the sandbox.
Module 4 Review

1. Why would you clone a PAF?
2. I need to add a back-up person on my project. Where do I go to do that?
3. My PAF is routed for approval. Why isn’t it in my PAF tab?
Module 5: After Submitted to Sponsor
In this module, you will learn to:

• View Award(s) from the PAF Workspace.
• Understand the criteria and process for requesting a hardship.
• Determine when to use Post a Comment vs. Request ORSP Action vs. Request Action/Modification
When the sponsor makes a decision...

High-Level Proposal States

Excludes Proposal Changes

1. PI/Research Administrator
2. Units
3. ORSP
4. Sponsor
5. Award
6. Active Project

State
Location of where the proposal is in the process.

* Composed of more detailed states.
When the sponsor makes a decision...

The proposal could be:

- **Awarded** – ORSP then processes and creates an Award (AWD).

- **Awarded** – but less than you requested. ORSP negotiates. State: **ORSP Processing**.
When the sponsor makes a decision...

The proposal could be:

- **Turned down**
  - If sponsor indicates it is not moving forward
  - eRPM system automatically moves projects to this state 18 months from initial submit date.
- **Withdrawn**—If U-M decides to not move forward.
Awards

ORSP creates the Award project from the PAF.

FAQs:

• How will I be informed of project award?
• Who gets email notification?
• Where do I find the info?
Award Modifications

- Award modifications are processed for any changes to initial award.

Examples:
- Administrative – for non-financial change. E.g., project end date is extended
- Financial – more money from sponsor
Request a Hardship

- U-M has not yet received the award, but PI/department have strong indication that it will come through and there is a need to start spending money on the project.
- The department agrees to take responsibility for spending if the award doesn’t come through.
Request a Hardship

- Navigate to the appropriate PAF
- **Hardships** tab > **Create New Hardship Request**
- Refer to step-by-step procedure to fill out
- Ask PI to sign form (required to route hardship request for unit approval)
Hardship Approval Process

- Either department or school/college signature required for hardship (PAF requires both)
- Routed to ORSP for approval
- ORSP requests hardship P/G # from Sponsored Programs
- Hardship P/G is issued
Post a Comment, Request ORSP Action, or Request Action/Modification

How do you determine which to use?
Post a Comment activity

- Use to inform (if not time-sensitive)
  - E.g., you want people to check out a document you uploaded
- Available on a PAF or Award in any state
- Permanent & visible to anyone with PAF/Award access
- Does not change PAF/Award state or Inbox display
- Recent Activity/Activity History list notes that a comment was posted
Post a Comment activity

• Option to send email notification
  ▫ Please include ORSP Project Representative and ORSP staff

• Option to attach files. These will display:
  ▫ with Post a Comment activity
  ▫ in Posted Documents of Attachments tab

Let’s try it!
Project Team Request ORSP Action

- Does not generate email notification
- Moves the PAF to PR’s inbox
- Use if you want ORSP to take action
- Available only after PAF is routed to ORSP for review
- Not available once the award process starts
Request Action/Modification

- Used to request post-award changes or other ORSP action.
- Replaces **Request ORSP Action** activity on PAFs in Awarded State.
- If the request is for a Post-Award Change, a signed form (PACR or ACR) is required.
- ORSP will review the request and determine if a modification is required.
Module 5 Review

1. Why would you request a hardship?
2. Where do you find Award Information?
3. The PI for the project has changed. Do you use Post a Comment, Request ORSP Action, Request Action/Modification?
Course Summary

• Grants.gov
  - Use system-to-system submission if all the forms you need are supported
  - Copy-map PAF information into Grants.gov forms
  - Difference between validate submission and submission pre-check
Course Summary

- Make and submit changes when PAF is in review
- Clone, relate, cancel PAFs
- Add or remove administrative personnel
- Request a hardship
- Documents: upload versus version
- Request ORSP Action, Post a Comment, Request Action/Modification
- Award information
Resources for Help and Info

- Course wrapper in My LINC
- eRPM Training web page
- ITS Service Center
Congratulations! You’re done!

Please fill out the course evaluation (bottom of course wrapper).