

eRPM Proposal Preparation & Unit Review



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.

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Getting Started with eResearch 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 eRPM.
- Locate Getting Started Resources.

Materials

eRPM Workflow

<http://www.umich.edu/~eresinfo/erpm/workflow/workflow.html>

Proposal Management – State Transition

<http://www.umich.edu/~eresinfo/erpm/workflow/workflow.html>

Login to eResearch

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

Getting Started in eRPM

<http://www.umich.edu/~eresinfo/erpm/start/gettingstarted.html>

Notes:

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.

Materials

PI & Project Team Home Workspace

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

PAF/Project Workspace

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

Reviewer Home Workspace

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

Find Proposals and Projects

http://www.umich.edu/~eresinfo/erpm/docs/PM_findPAFs_v2_SS.pdf

Notes

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).

Materials

Create a PAF: Basics

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

Create eRPM Account

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

Obtain a Friends Account

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

DRDA Principal Investigator Policy

http://www.drda.umich.edu/proposals/principal_investigator.html

Space – List of Buildings in eRPM

http://www.umich.edu/~eresinfo/erpm/docs/Space_Research_List.xls

Working with Documents

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

Notes

Grants.gov

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.

Materials

Grants.gov from eRPM PowerPoint Used in Training:

<http://www.umich.edu/~eresinfo/erpm/docs/Grants.pdf>

Grants.gov from eRPM

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

Notes

Post a Comment and Activity History

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.

Materials

Post a Comment for Entire Project

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

Posted Comment for Entire Project Email

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

Notes:

Sign PAF and Conflict of Interest Statement

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.

Materials

View and Print a PAF Summary

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

PI Sign PAF Conflict of Interest

Quick Directions

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

Demonstration

http://www.umich.edu/~eresinfo/erpm/sims/PAF_EL11_PI_SignPAF/PI_SignPAF.htm

Detailed Directions:

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

Notes:

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.”

Materials

Create a PAF: Basics (Includes Instructions on How to Route for Approval)

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

Routed for Unit Review Email – Sent to UM PI & Primary Research Administrator

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

Notes

Making Changes to the PAF After Routed

Goal/outcome:

Make & submit changes to PAF worksheet 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.

Materials

PAF Changes

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

View Change Details

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

Changes Made Email

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

Notes

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.

Materials

Manage Data

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

Relate PAFs

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

Finalizing Proposal Documents

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.

Materials

Finalize Proposal for Submission to Sponsor

Overview

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

Detailed Directions:

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

Notes

Log Project Team Submission to Sponsor

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.

Materials

Log Project Team Submission to Sponsor

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

Notes

Clone PAF

Goal/outcome:

Clone 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.

Materials

Clone a PAF

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

Notes

Cancel PAF

Goal/outcome:

Cancel a PAF.

Objectives:

By the end of this module, you will be able to:

- 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.

Materials

Cancel PAF

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

Notes

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 activity **Request DRDA Action** when changes are needed during DRDA states.
- Recognize award notifications sent from eRPM.
- Locate award documents in eRPM.

Materials

Workflow

http://www.umich.edu/~eresinfo/erpm/workflow/drda_review.html

PAF Changes

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

Award Notifications

<http://www.umich.edu/~eresinfo/erpm/docs/PANsPACs.html>

Project Award Notice Sample

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

Project Award Change Sample

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

Notes

Routing Logic and Reviews

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

Materials

Ready for Review email

Manage Departments

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

Notes

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.

Materials

PAF Workspace

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

View and Print a PAF Summary

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

Post a Comment to the Entire Project

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

Posted Comment for the Entire Project

Notes

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.

Materials

PAF Changes

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

Changes Made Email

View Change Details

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

Notes

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.

Materials

Unit Review and Approve

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

Assign an Ad Hoc Reviewer

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

Notes

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

Materials

Acknowledge Changes

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

Suspend Approval

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

Notes

Support and Additional Training

Goal/outcome:

Make the participants aware of all the resources available to help them be successful.

Objectives:

After completing this module, you will be able to:

- Find additional training
- Find contacts for questions

Training Materials

<http://www.umich.edu/~eresinfo/erpm/training.html>

Contacts for Questions

- When to use eRPM or Unit Business Policy/Requirements, contact Your **Research Unit Liaison**
<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
Phone: 734-936-7000, option 6
E-mail: maishelpdesk@umich.edu

Additional Topics Not Covered During Class

Materials

Email Notifications Sent from eRPM

http://www.umich.edu/~eresinfo/erpm/start/config_email.html

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

Hardship Requests

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

End of the Course Evaluation:

<http://www.zoomerang.com/Survey/?p=WEB229KYQNGAE7>