

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** (username 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.

Verify Information

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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>

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**.

II. Home Workspace

Home Workspace for PI

The screenshot shows the eResearch Proposal Management interface. At the top, there's a navigation bar with 'Inbox', 'In Progress', 'Submitted to Sponsor', 'Award Received', 'Active', 'Closed', 'Cancelled', and 'Not Funded'. Below this, there are two main sections:

- PAFs with Required Action:** This section has a filter by ID and a table with the following data:

| ID | Name | Date Modified | State | PI | Dept | Sponsor | Deadline | Sponsor |
|-------------|------------------------------------|--------------------|----------------------|---------|-------------------------|---------|----------|---------|
| 09-PAF00110 | Off-Label Uses for Grape Kool-Aid® | 11/11/2008 2:04 PM | Proposal Preparation | Forrest | COE EECS - ECE Division | | 2/9/2009 | |
- PAFs Not Yet Signed by PI:** This section also has a filter by ID and a table with the following data:

| ID | Name | Date Modified | State | PI | Dept | Sponsor | Deadline | Sponsor |
|-------------|------------------------------------|--------------------|----------------------|---------|-------------------------|---------|----------|---------|
| 09-PAF00110 | Off-Label Uses for Grape Kool-Aid® | 11/11/2008 2:04 PM | Proposal Preparation | Forrest | COE EECS - ECE Division | | 2/9/2009 | |

- eResearch Proposal Management opens and displays your **Home Workspace**.
- The PAF that needs to be signed appears in:

PAFs with Required Action

PAFs Not Yet Signed by PI

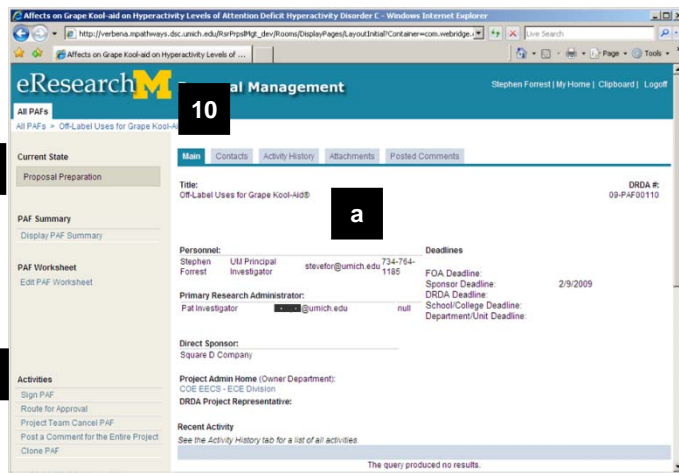
because it is still being worked on and has not been signed by the UM Principal Investigator (PI) yet.

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.
- 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

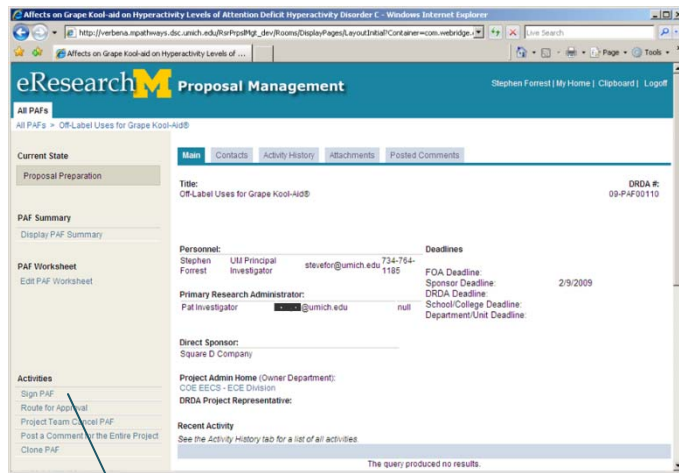
PAF Workspace



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.).

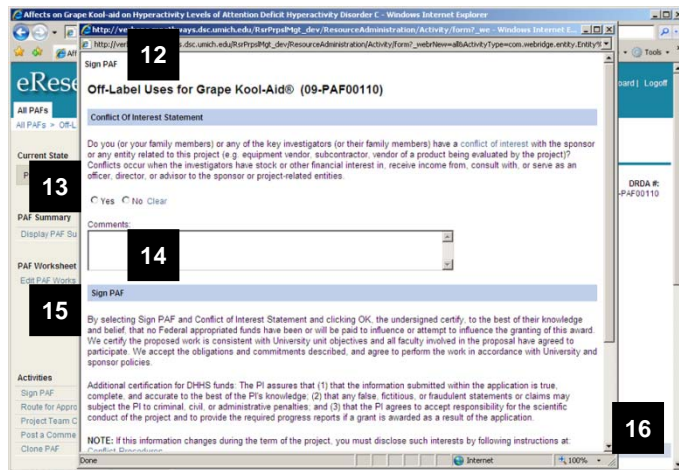
IV. Sign PAF Activity

PAF Workspace



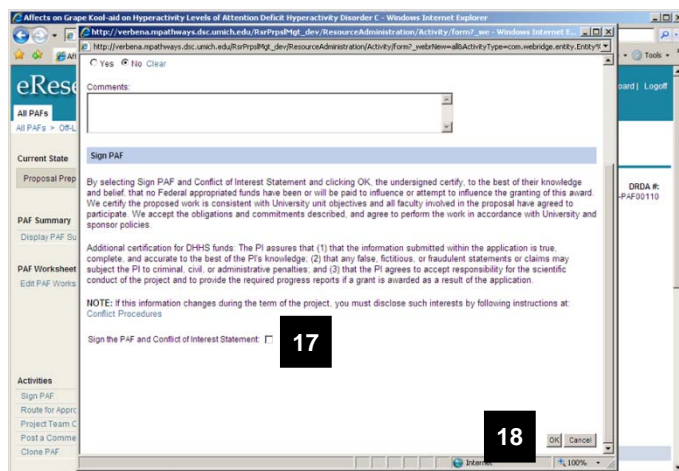
11. To sign the PAF, click **Sign PAF** under activities.

Sign PAF



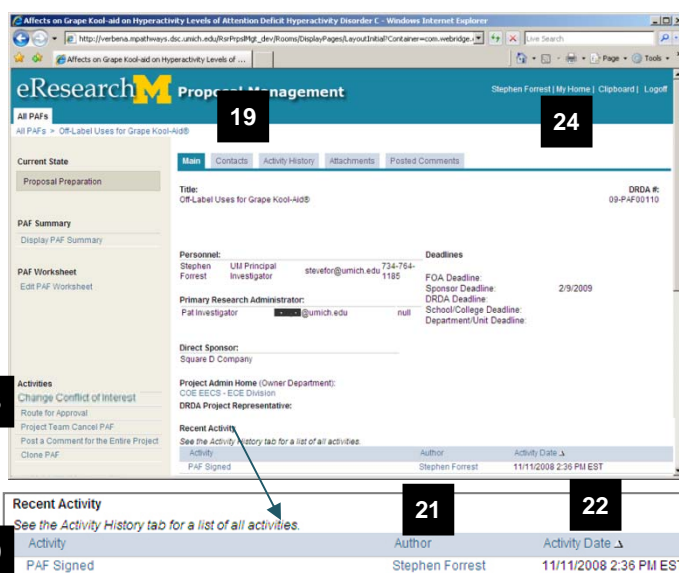
12. The **Sign PAF** window appears.
13. Read the **Conflict of Interest Statement** and answer the question below.
14. If needed, enter **Comments**.
- Important!** Comments are required if you answer Yes to the Conflict of Interest question.
15. Read the **Sign PAF** statement.
16. Scroll down the page.

Sign PAF (continued)



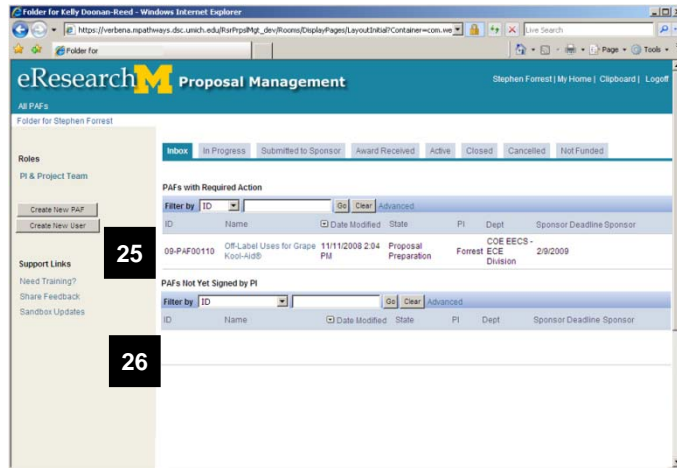
17. Select the **Sign the PAF and Conflict of Interest Statement** box to electronically sign the PAF.
18. Click **OK** to complete your electronic signature of the Conflict of Interest Statement and the PAF.

PAF Workspace



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.

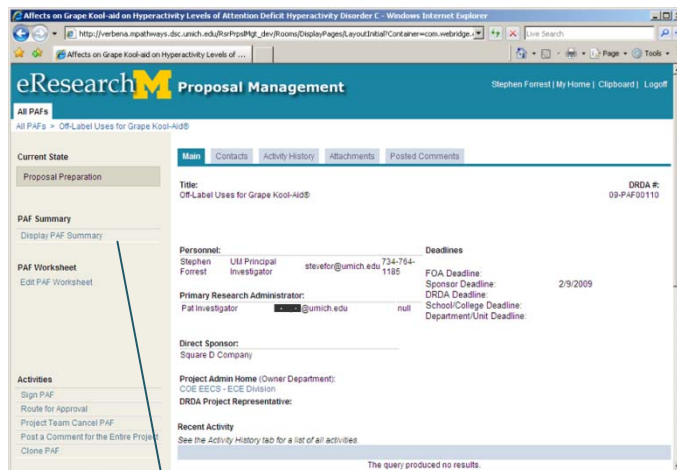
Home Workspace for PI



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.

IV. Sign PAF from PAF Summary

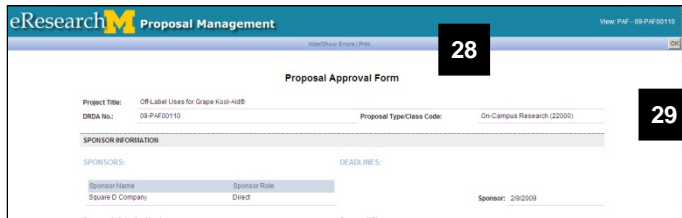
PAF Workspace



27. To sign the PAF from the PAF Summary, click **Display PAF Summary** under PAF Summary.



PAF Summary

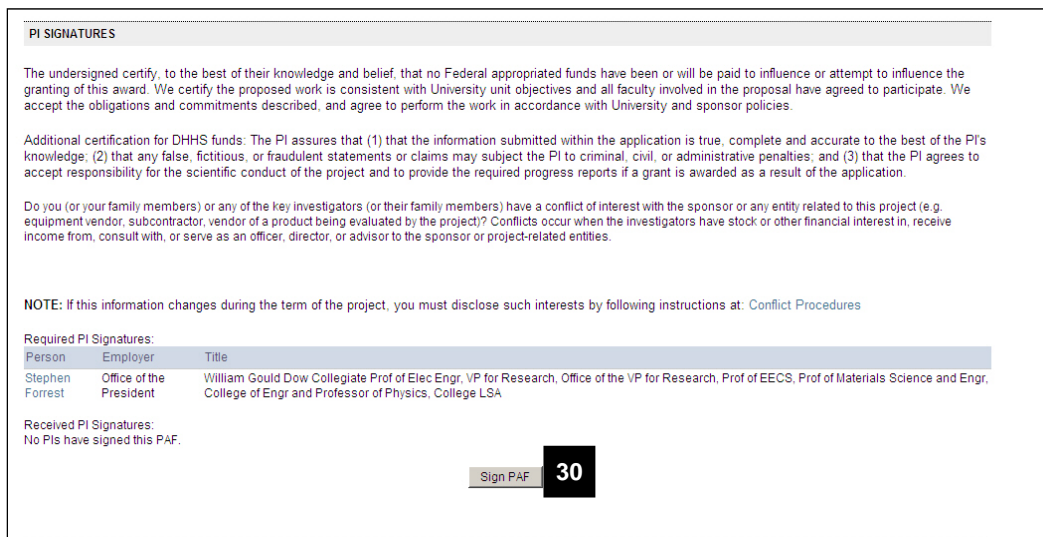


28. The PAF Summary is displayed. It is a printer friendly version of the PAF.

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

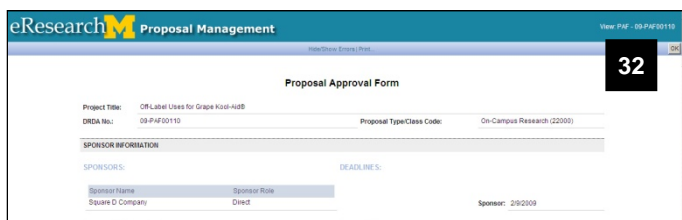
29. Scroll down the page until you find the PI signatures.



30. Click **Sign PAF**.

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

PAF Summary



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.