PI Sign PAF Conflict of Interest

The Principal Investigator 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 six 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
VI. Verify PAF has been signed and find PAF in eRPM

I. Login to eResearch Proposal Management

1. Follow the steps in the Login to eResearch Proposal Management procedure on the Training page.

II. Home Workspace

Home Workspace for PI

2. eResearch Proposal Management opens and displays your Home Workspace.
3. The PAF that needs to be signed appears in:
   - PAFs with Required Action
   - PAFs Not Yet Signed by PI

Notes:

- **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 the UM PI. Use this to quickly find a list of PAFs where you still need to sign PAF/ Conflict of Interest Statement.

4. Click the PAF from either section to access the PAF Workspace.
III. PAF Workspace

**PAF Workspace**

5. The PAF 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), etc.
   c. Complete activities related to the PAF/proposal (e.g., Edit PAF Worksheet, Sign PAF, Route for Approval, etc.).

IV. Sign PAF Activity

There are two ways for a PI to sign a PAF. The following procedure uses the **Sign PAF** Activity on the PAF Workspace. To sign the PAF using the **PAF Summary**, see section V.

**PAF Workspace**

6. To sign the PAF, click **Sign PAF** under **Activities**.
7. The Sign PAF window appears.

8. Read the Conflict of Interest Statement and answer the question below.

9. If needed, enter Comments.

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

10. Read the Sign PAF statement.

11. Select the Sign the PAF checkbox to electronically sign the PAF.

12. Click OK.

13. Skip to section VI.
IV. Sign PAF from PAF Summary

**PAF Workspace**

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

**PAF Summary**

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

- All information entered on the PAF
- All attached/uploaded documents (including supporting documents and final proposal documents)
- PI/Co-I Signatures
- Unit Approval Signatures
- ORSP Approval Signature
- Routing and Submission Information

15. Scroll down.
PAF Summary (continued)

16. Click **Sign PAF**.

17. Follow steps 7 - 12 above to sign the PAF.

PAF Summary (continued)

18. Click **OK** to return to the PAF Workspace.
VI. Verify PAF Has Been Signed and Find PAF in eRPM

PAF Workspace

The PAF Workspace is updated upon signing. In the Recent Activity list:

a. **PAF Signed** line has been added to the list.

b. **Author** shows who signed the PAF.

c. **Activity Date** shows the date the PAF was signed.

Notes:

d. The **Change Conflict of Interest** Activity can be used to change the COI Statement at any time.

e. Click **My Home** to return to your Home Workspace. This PAF no longer appears in the PAFs Not Yet Signed by PI list.

f. If the PAF has not yet been routed for approval, it will appear in the **PAFs with Required Action** list.

g. If the PAF has already been routed for approval, it will appear in the **PAFs** list (not shown) under the In Progress tab.