

PAF Changes

This procedure details how the PI & Project Team can:

- [Make and submit PAF changes.](#) Page 2
- [Decline requested PAF changes.](#) Page 7
- [Request ORSP Action to make changes.](#) Page 9

Important Information

- Before a PAF is routed for approval, the PI & Project Team can make changes at will/freely because it is still being prepared. After the PAF is routed for approval, there are processes in place to make and submit changes. These changes are tracked in the eRPM system.
- Although changes are tracked in eResearch, it is REQUIRED to use the comments to summarize the changes made.
- eResearch allows Reviewers to make changes. If a Reviewer is making a change, it locks the PI & Project Team & other departments from making changes. If a Reviewer submits a change, the UM Principal Investigator & Primary Research Administrator will receive an email.
- The PI or Project Team, may need to change a PAF for a variety of reasons. How a PI or Project Team member can make these changes depends on the PAF's State (where it is in the process) & the situation. See table below for when to use the various activities.

Activity	When to Use It	Who Can Use It
Project Team Make Changes	<ul style="list-style-type: none"> • PAF has been routed for unit approval (Unit Review state) and PI & Project wants to make a change(s). 	<ul style="list-style-type: none"> • Anyone with PAF Edit Rights
Project Team Submit Changes	<ul style="list-style-type: none"> • Need to submit changes made by Project Team. • Need to submit changes that were made per a request for a change from Unit or ORSP. 	<ul style="list-style-type: none"> • Primary Research Administrator or UM PI
Project Team Decline Changes	<ul style="list-style-type: none"> • Unit or ORSP requested change and PI & Project Team does not agree with requested change. • May also be used to decline post-submission changes. 	<ul style="list-style-type: none"> • Primary Research Administrator or UM PI
Project Team Request ORSP Action	<ul style="list-style-type: none"> • ORSP Review states – PAF has been approved by all units and is being reviewed by ORSP • Submitted to Sponsor state – Proposal has been reviewed by ORSP & Submitted Sponsor. Sponsor may contact PI to make changes. • Negotiation state – Proposal is in negotiation. Sponsor may contact PI to make changes. • Active – Project is active. Project Team may need to alert ORSP of upcoming award change. 	<ul style="list-style-type: none"> • Primary Research Administrator or Primary Post-Award Contact

MAKE AND SUBMIT CHANGES

Use this when:

- PAF has been routed for unit approval (Unit Review state) and PI & Project wants to make change(s).
- Received a request for a change from Unit or ORSP and PI & Project needs to make change(s).

When either a Unit or ORSP requests a change:

- UM PI & Primary Research Administrator will receive an email.
- PAF will become editable again.
 - Appears in Home Workspace Inbox in PAFs with Required Action section.
 - Has one of the following states (depending on who requested change):
 - **Unit Review - Project Team Making Changes.**
 - **ORSP Review - Project Team Making Changes.**

PAF Workspace

1. If a Unit or ORSP requested changes, skip to step 5.

Notice the PAF is in **Unit Review** and cannot be edited. **View PAF Worksheet** appears instead of Edit PAF Worksheet.

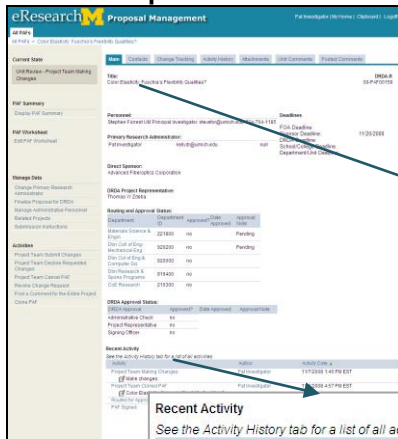
2. Click **Project Team Make Changes** activity from the PAF Workspace.

Project Team Make Changes Window



3. Optional, enter **Comments**.
4. Click **OK**.

PAF Workspace



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Recent Activity
See the *Activity History* tab for a list of all activities.

Activity	Author	Activity Date
Project Team Making Changes Make changes.	Pat Investigator	11/7/2008 1:48 PM EST
Project Team Cloned PAF	Pat Investigator	11/6/2008 4:57 PM EST
Color Elasticity: Orange's Flexibility Qualities? Routed for Approval	Stephen Forrest	11/6/2008 4:19 PM EST
PAF Signed	Stephen Forrest	11/6/2008 4:18 PM EST

Current State

Unit Review - Project Team Making Changes **6**

PAF Summary

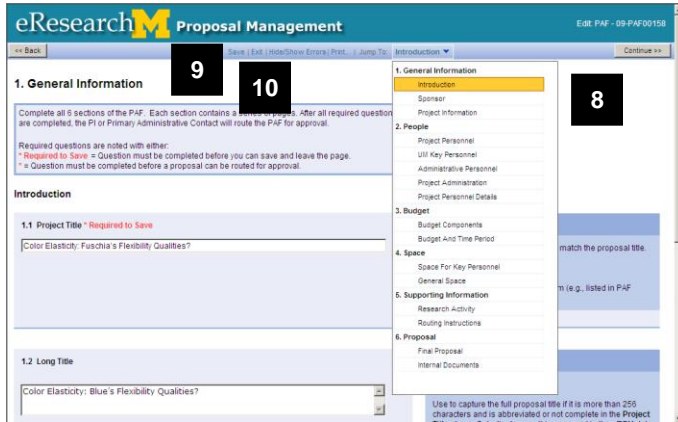
[Display PAF Summary](#)

PAF Worksheet

[Edit PAF Worksheet](#) **7**

5. Notice that **Project Team Making Changes** is logged in the Recent Activity list.
Note: It logs who performed the activity (author) and the activity date time.
Note: If you received a change request from a unit or ORSP, this request would be logged in Recent Activity.
6. Notice that the state of the PAF is **Unit Review – Project Team Making Changes**.
Note: When the state of the PAF is **Unit Review – Project Team Making Changes** it disappears from the inbox of reviewers whose turn it is to review the PAF (Pending) because changes need to be made by the Project Team. If these Reviewers need to view the PAF, they will always be able to see it using All PAFs.
 If you received a change request from ORSP the state of the PAF is **ORSP Review – Project Team Making Changes**.
7. Click **Edit PAF Worksheet**, to go and make changes.

PAF Worksheet



8. Make the needed changes in the PAF Worksheet.

Tip: Use the Jump To list to go directly to the page where you need to make a change.

Note: Anyone with edit access to the PAF can make changes while it is open for editing.

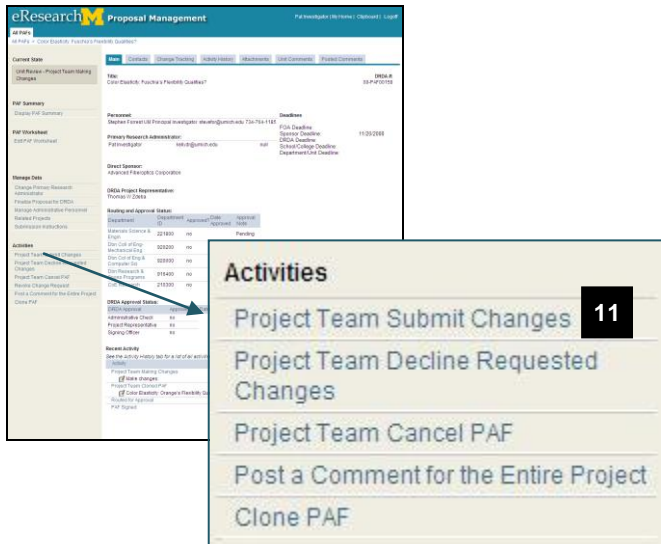
Warning!

If two people are editing the same page at the same time, the last person to save, SAVES the page. The other person's information is overwritten. Be sure to communicate with your collaborators when making edits.

9. **Save** your changes.

10. Click **Exit** to return to the PAF Workspace.

PAF Workspace



11. Click **Project Team Submit Changes** activity from the PAF Workspace.

Important!

- Only the UM PI or Primary Research Administrator can submit changes.
- Changes will not be written to the PAF & viewed by Reviewers & ORSP until they are submitted.

Project Team Submit Changes Window

12. If a department requested a change, the list of departments who are reviewing the PAF appear. Select the department(s) for which you have made changes.

13. Select a **Change Type**.

Options include:

- Budget or Budget Justification
- Cost Sharing
- Key Personnel
- Space Resources
- Typos
- Research
- Other
- No Changes Made

Tips:

- If you decide that changes are not needed, use **No Changes Made** as the Change Type.
- If you change key personnel, make sure you verify your Administrative Home, Space for Key Personnel, & Project Personnel Details.

14. **Required**

Enter **Comments** that summarize the change made.

Note: The change log tracks all changes made with a line for each page, but it is not convenient for quick review.

15. Click **OK**.

PAF Workspace

Current State

Unit Review **17**

PAF Summary

Display PAF Summary

PAF Worksheet

View PAF Worksheet **18**

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Recent Activity
See the Activity History tab for a list of all activities.

Activity	Author	Activity Date
Project Team Submitted Changes Changed project title.	Pat Investigator	11/7/2008 2:44 PM EST
Project Team Making Changes Make changes.	Pat Investigator	11/7/2008 1:46 PM EST
Routed for Approval	Stephen Forrest	11/6/2008 4:19 PM EST
PAF Signed	Stephen Forrest	11/6/2008 4:18 PM EST

16. Notice that **Project Team Submitted Changes** is logged in the Recent Activity list.

Note: It logs your comment, who performed the activity (author) and the activity date time.

17. Notice that the state of the PAF changed to **Unit Review**.

Note: If you received a change request from ORSP the state of the PAF would return to **ORSP Review**.

18. Notice that you cannot edit the PAF. **View PAF Worksheet** appears.

DECLINE REQUESTED CHANGES

Only the Primary Research Administrator or UM PI can decline request changes.

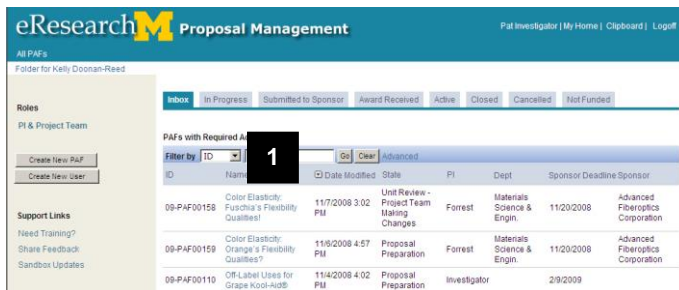
Use this when:

- Unit or ORSP requested change and PI & Project Team does not agree with requested change.
- May also be used to decline post-submission changes.

When either a Unit or the ORSP requests a change:

- PI & Project Team will receive an email.
- PAF will become editable again. Returns to either:
 - **Unit Review - Project Team Making Changes.**
 - **ORSP Review - Project Team Making Changes.**

PI & Project Team Home Workspace

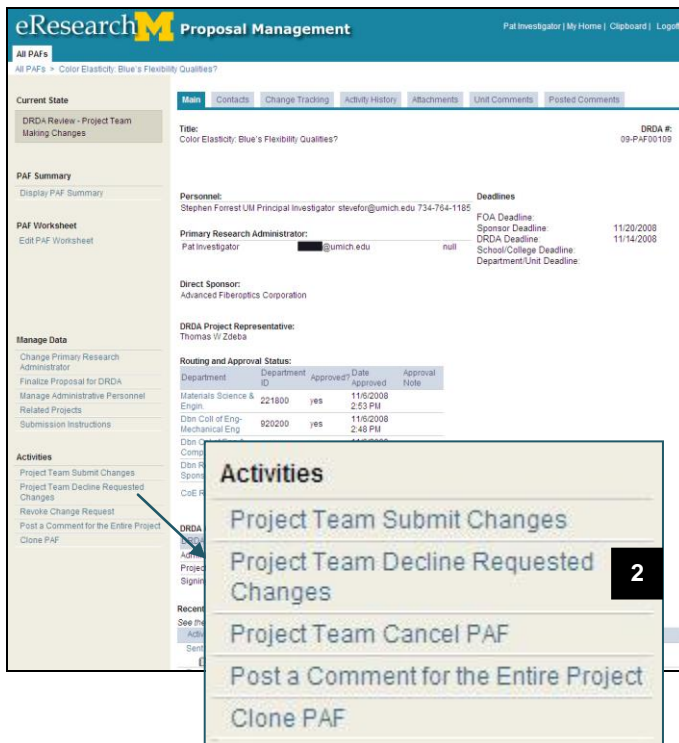


1. Click on the PAF from your Home Workspace.

Note the state of the PAF is either:

- **Unit Review - Project Team Making Changes.**
- **ORSP Review - Project Team Making Changes.**

PAF Workspace



2. Click **Project Team Decline Requested Changes** activity from the PAF Workspace.

Decline Requested Changes activity window

Project Team Decline Requested Changes

You are about to decline a request for an expedited submission of this PAF. Use the text box below to log any comments and the upload area to upload any relevant documents. Click OK to save your changes. Click CANCEL to cancel this activity.

Select the Departments whose requests you are declining.

3	ID	Name
<input type="checkbox"/>	230000	Medical School

Comments:

4

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OK Cancel

3. Select the Departments whose requests you are declining.
4. Strongly recommended, enter **Comments** explaining why you are declining to make changes.
5. Click **OK**.

REQUEST ORSP ACTION

Anyone with access to edit that PAF can request ORSP Action.

Use this when in the state of:

- ORSP Review – PAF has been approved by all units and is being reviewed by ORSP
- Submitted to Sponsor – Proposal has been reviewed by ORSP and Submitted Sponsor. Sponsor may contact PI to make changes.
- Negotiation – Proposal is in negotiation. Sponsor may contact PI to make changes.
- Active – Project is active. Project Team may need to alert ORSP of upcoming award change.

PAF Workspace

1. Notice the state of the PAF. It could be:
ORSP Review
Submitted to Sponsor
Negotiation
2. Notice that the PAF cannot be edited.
View PAF Worksheet appears.
3. Click **Project Team Request ORSP Action** activity from PAF Workspace.

Project Team Request ORSP Action Window

4. Enter **Comments** that explain that you want to:
 - Request that ORSP edit the PAF
 - Enable the project team to edit the PAF
 - Have ORSP cancel the PAF

Important!

Do not use this activity to indicate finalization of the proposal document or communicate submission instructions to ORSP.

5. (Optional) Click **Add** to upload any supporting documents.
6. Click **OK** (not shown).

Note: Requesting to make a change does not automatically allow a project team to make changes (i.e., does not put the PAF into an editable state). The request must be approved by ORSP.

If ORSP approves, you will be able to make changes to the PAF.

