

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

**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 DRDA and PI & Project needs to make change(s).

When either a Unit or DRDA 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.**
    - **DRDA Review - Project Team Making Changes.**

**PAF Workspace**

1. If a Unit or DRDA 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 1:46 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**

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**PAF Summary**

Display PAF Summary

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**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 DRDA, 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 DRDA the state of the PAF is **DRDA Review – Project Team Making Changes**.
7. Click **Edit PAF Worksheet**, to go and make changes.





### 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.

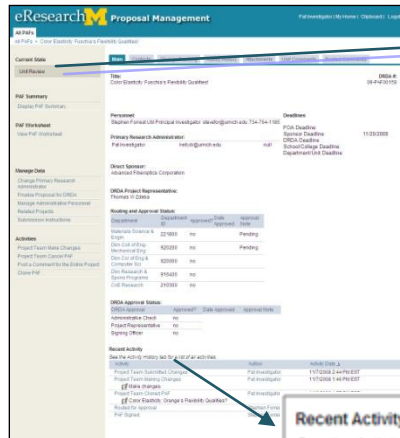
14. **Required**

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**

**16**

**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 DRDA the state of the PAF would return to **DRDA 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.

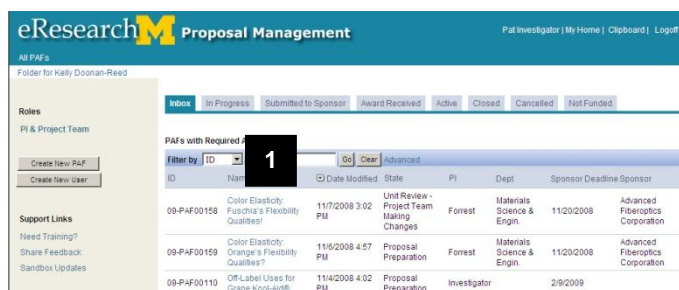
Use this when:

- Unit or DRDA 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 DRDA requests a change:

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

**PI & Project Team Home Workspace**

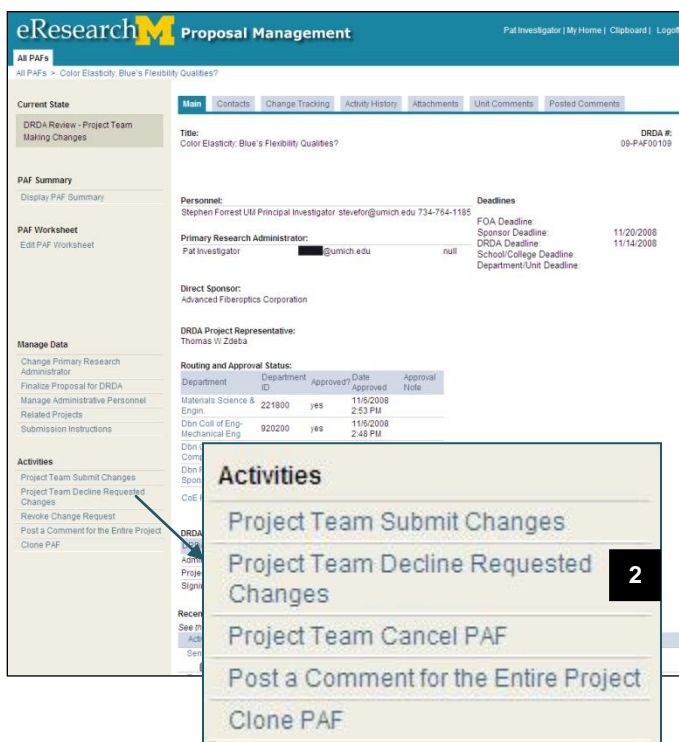


1. Click on the PAF from your Home Workspace.

Note the state of the PAF is either:

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

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

Comments:

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 DRDA ACTION**

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

Use this when in the state of:

- DRDA Review – PAF has been approved by all units and is being reviewed by DRDA
- Submitted to Sponsor – Proposal has been reviewed by DRDA & 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 DRDA of upcoming award change.

**PAF Workspace**

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

## Project Team Request DRDA Action Window

Project Team Request DRDA Action

### Color Elasticity: Blue's Flexibility Qualities? (09-PAF00109)

#### Request DRDA Action

Enter comments in the text box to indicate what DRDA action is required.  
Click OK to send to DRDA for processing.  
Click CANCEL to cancel this activity and close this window.

Examples of the appropriate use of this activity are to:

- request that DRDA edit the PAF
- enable the project team to edit the PAF
- have DRDA cancel the PAF

Do not use this activity to indicate finalization of proposal documents or communicate submission instructions to DRDA.

Comments:

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5 OK Cancel

4. Enter **Comments** that explain that you want to:

- Request that DRDA edit the PAF
- Enable the project team to edit the PAF
- Have DRDA cancel the PAF

#### **Important!**

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

5. Click **OK**.

**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 DRDA.

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