

Create a PAF: Basics

This procedure details how to:

- **Create a PAF:** the fields that must be completed in order to create a PAF.
- **Hide/Show Errors:** the function that allows you to view a list of fields that need to be completed before the PAF can be routed for approval.
- **Route for Approval:** UM Principal Investigator or Primary Research Administrator can send PAF to units for review and approval.

Important Information

- Red asterisk (*) indicates a question that must be answered in order to route for approval.
- *** Required to Save** indicates a question must be completed before you can save and leave the page.
- This procedure focuses on the minimum information needed to create, but not to complete, a PAF. For comprehensive demonstration of PAF completion, launch the PAF online training from the [eResearch Training page](#).

CREATE A PAF

Specific fields must be completed in order to create a PAF.

Home Workspace

The screenshot shows the 'Home Workspace' for a PI. On the left sidebar, under 'Roles', there are buttons for 'Create New PAF' and 'Create New User'. A large number '1' is placed next to the 'Create New PAF' button. Below the sidebar, there are 'Support Links' for training and feedback. The main area shows a list of PAFs in 'Inbox' status, with two entries: '09-PAF00110' and '09-PAF00109', both in 'Proposal Preparation' state.

1. Click **Create New PAF** from Home Workspace

New PAF

1. General Information

Complete all 6 sections of the PAF. Each section contains a series of pages. After all required questions are completed, the PI or Primary Administrative Contact will route the PAF for approval.

Required questions are noted with either:
 * **Required to Save** = Question must be completed before you can save and leave the page.
 * = Question must be completed before a proposal can be routed for approval.

Introduction

investigator_pi - New PAF - Sun Nov 2 13:53:58 EST 2008

2 1.1 Project Title * **Required to Save**

2 1.2 Long Title

2 1.3 Is this a Grants.gov funding opportunity? * **Required to Save**

If yes, information from the funding opportunity will be automatically entered on the Sponsor page of this project. Selecting 'Yes' does not require electronic submission.

Yes No [Clear](#)

2 1.4 Is this a pre-proposal? * **Required to Save**

Yes No [Clear](#)

HELP

Change default **Project Title** to match proposal title.

Limited to 256 characters. Identifies the proposal in the system.

[Additional Help](#)

HELP

Optional

Use to capture the full proposal title if it is more than 256 characters and is abbreviated or not complete in the **Project Title** above. Only displays on this page and in the data warehouse.

[Additional Help](#)

HELP

Select **Yes** to link guidelines, forms, and submission instructions to proposal package.

[Additional Help](#)

HELP

Determines format of ORSP number.

[Additional Help](#)

2. Complete questions 1.1, 1.3, and 1.4.

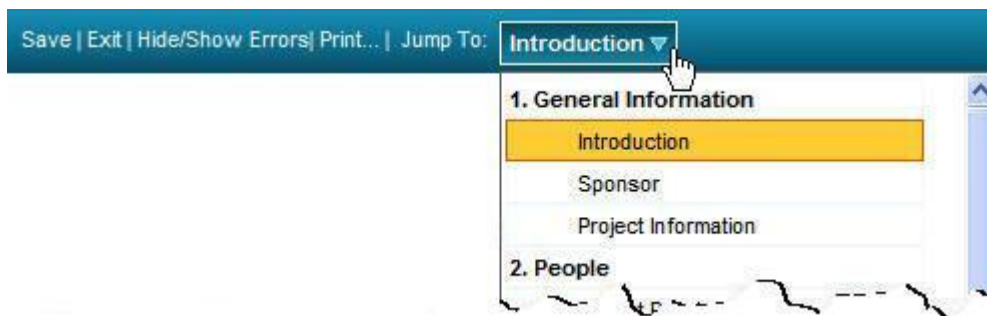
Note: These questions must be answered to save the page and create the PAF as indicated by * **Required to Save**.

3. Create the PAF by clicking **Save**
OR
clicking **Continue** to save and move to the next page of the PAF.

PAF Worksheet

4. The PAF is created, and your PAF menu options expand to include:
- **Save:** Save page
 - **Exit:** Exit PAF Worksheet and returns you to Home Workspace. Prompts you to save page.
 - **Hide/Show Errors:** Validates that all fields required to route for approval are completed.
 - **Print:** Print page of PAF Worksheet.
 - **Jump To:** Can skip directly to pages of PAF Worksheet.

PAF Worksheet – Jump To



Jump To allows you to go directly to pages of the PAF Worksheet. It is recommended that you complete the PAF Worksheet in order through the Key Personnel section before starting to use **Jump To**.

Hide/Show Errors

Use Hide/Show Errors to create a list of fields that need to be completed before the PAF can be routed for approval. If these fields are not completed, you will not be able to route for approval.

PAF Worksheet – Hide/Show Errors

The screenshot shows the 'eResearch Proposal Management' interface. At the top, there's a navigation bar with buttons for '<< Back', 'Save', 'Exit', 'Hide/Show Errors', 'Print...', 'Jump To: Introduction', and 'Continue >>'. The main content area is titled '1. General Information' and contains instructions for completing the PAF sections. A 'HELP' box provides details for the '1.1 Project Title' field, which is marked as 'Required to Save'. At the bottom, an 'ERROR/WARNING MESSAGES' box (labeled '2') lists four error messages in red. A 'Refresh' button (labeled '4') is located in the top right of the error box. A 'Jump To' table (labeled '3') is also visible, listing fields like 'Sponsor - Grants.gov', 'Project Information', and 'Key Personnel'.

1. Click **Hide/Show Errors** to view a list of fields that are required to route for approval that are not completed.
2. Review the **Error/Warning Messages** that appear in red.
3. Click on the **Jump To** link within the **Error/Warning Messages** box to navigate to the page where the error is located.

Important! Make sure to save changes made on each page.

4. Click **Refresh** to validate that you fixed errors.

Note: Click **Hide/Show Errors** to turn off the Hide/Show error display (works like a toggle button).

5. Click **Exit** to save your changes and return to the PAF Workspace.

Route for Approval

Before you route for approval, you may want to request that the UM Principal Investigator sign the PAF/Conflict of Interest Statement because many departments will not approve unless the UM PI has signed the PAF/Conflict of Interest Statement.

- Only the **UM Principal Investigator** or **Primary Research Administrator** can route for approval.

PAF Workspace

The screenshot shows the 'eResearch Proposal Management' interface. On the left sidebar, under 'PAF Worksheet', there is a 'Route for Approval' activity. A black box with the number '1' is placed over this activity, with an arrow pointing to it. The main content area shows a list of activities for the project, including 'Copy PAF Info to Grants-gov Forms', 'Route for Approval', 'Project Team Cancel PAF', 'Post a Comment for the Entire Project', and 'Clone PAF'. The 'Route for Approval' activity is highlighted in blue.

1. Click the **Route for Approval** activity from the PAF workspace.

Route for Approval activity window

The 'Route for Approval' window shows the following details:

- PAF Title:** (09-PAF00776)
- Instructions:** Enter comments in the text box (optional). Click OK to route this PAF for review by the listed UM units. Click CANCEL to cancel this activity and close this window.
- Department Table:**

| Dept ID | Dept Name |
|---------|---------------------------|
| 222500 | Mechanical Engineering |
| 210300 | CoE Research |
| 550000 | Office of VP for Research |
- UM PIs who have not signed:** Stephen Forrest
- Comments:** A text area for entering comments.
- Buttons:** OK and Cancel.

2. Review the displayed Departments. If you notice that a department is not listed that needs to review the PAF, click Cancel and edit the PAF Worksheet.

Note: The departments included are based on your PAF Worksheet entries regarding Personnel, Cost Sharing, Space, Other Commitments, Subproject/Grants, and Administrative Home.

3. Add **Comments** if desired or required*.
*If any of the UM PIs have not yet signed the PAF, you are required to enter a comment.
4. Click **OK**.

PAF Workspace

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| Department | Department ID | Approved? | Date Approved | Approval Note |
|---------------------------|---------------|-----------|---------------|---------------|
| Mechanical Engineering | 222500 | no | | Pending |
| CoE Research | 210300 | no | | |
| Office of VP for Research | 550000 | no | | |

Notice that the current state of the PAF is now Unit Review.

5. The PAF Workspace now includes the Routing and Approval Status table.

Note: The Primary Research Administrator & UM Principal Investigator are sent an email to confirm that the PAF was routed for approval.

6. **Pending** appears by the department(s) whose turn it is to review the PAF.

Notes:

- The PAF appears in the **In Box** for Reviewers whose turn it is to review the PAF (Pending).
 - An email is sent to the department email contacts when it is a department's turn to review the PAF (Pending).
 - Even if it is not a department's turn to review a PAF (Pending), the reviewers from the department will be able to view the PAF in their **Upcoming** tab.
7. **Approved?** will change from "no" to "yes" when a department approves & the **Date Approved** will display.
8. If your PAF is stuck & you need to follow-up on its review status, click the name of the **Department** to view contacts for the department that you can call or email to find out more about the status of the department's review.