

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

eResearch **M** Proposal Management
Pat Investigator | My Home | Clipboard | Logoff

All PAFs

Folder for .

Roles

PI & Project Team

PAFs with Required Action

Filter by ID

ID	Name	Date Modified	State	PI	Dept	Sponsor Deadline	Sponsor
09-PAF00110	Off-Label Uses for Grape Kool-Aid®	11/2/2008 3:08 PM	Proposal Preparation				
09-PAF00109	Color Elasticity; Blue's Flexibility Qualities?	11/2/2008 2:11 PM	Proposal Preparation				

PAFs Not Yet Signed by PI

Filter by ID

ID	Name	Date Modified	State	PI	Dept	Sponsor Deadline	Sponsor
09-PAF00110	Off-Label Uses for Grape Kool-Aid®	11/2/2008 3:08 PM	Proposal Preparation				
09-PAF00109	Color Elasticity; Blue's Flexibility Qualities?	11/2/2008 2:11 PM	Proposal Preparation				

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

New PAF

2. Complete questions 1.1, 1.3, and 1.4.

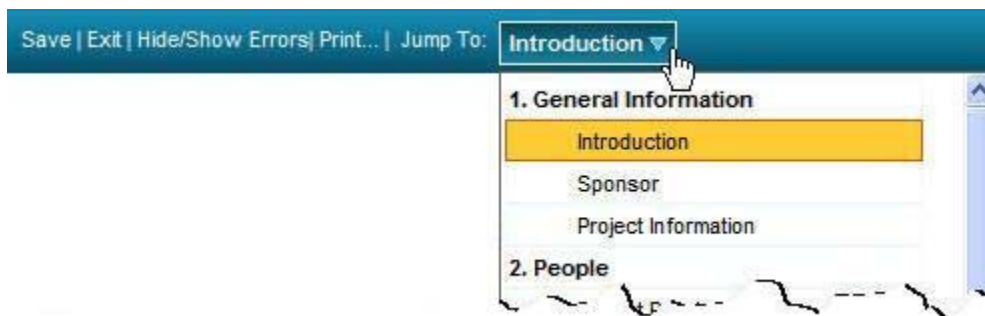
Note: These questions must be answered to save the page and create the PAF as indicated by *** Required to Save**.

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

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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

1.1 Project Title * Required to Save

HELP

Change default Project Title to match proposal title.

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

[Additional Help](#)

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ERROR/WARNING MESSAGES

Message

- You must select a sponsor.
- You must enter the Sponsor Deadline or check the checkbox of No Sponsor Deadline.
- You must enter at least one key term to describe the project.
- Please answer question 2.2.

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Field Name	Jump To
Sponsor - Grants.gov	Sponsor - Grants.gov
Sponsor - Grants.gov	Sponsor - Grants.gov
Project Information	Project Information
Key Personnel	Key Personnel

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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, there is a sidebar with a list of activities. The 'Route for Approval' activity is highlighted with a black box containing the number '1'. An arrow points from this activity to a larger 'Activities' window in the center. This window lists several activities, with 'Route for Approval' being the second item. The date '12/1/2008' is visible next to it. The main content area shows details for the PAF, including the title 'This is the Project Title' and the DMSA ID '09-PAF0000210'.

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

Route for Approval activity window

The 'Route for Approval' window displays the following information:

- 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:** The following PIs have not signed this PAF. You can continue the Route for Approval activity by clicking the OK button or close this window by clicking the Cancel button. All PIs will have to sign this PAF before any award can be processed. Stephen Forrest
- Comments:** A text area for entering comments.
- Buttons:** OK and Cancel buttons at the bottom right.

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

The screenshot shows the eResearch Proposal Management Sandbox interface. The current state is 'Unit Review'. A 'Routing and Approval Status' table is highlighted with callouts 5, 6, 7, and 8. Callout 5 points to the table title, 6 to the 'Pending' status, 7 to the 'no' in the 'Approved?' column, and 8 to the 'Department' column.

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.