

- The business practice allows a PI to complete his/her proposal while the PAF is being routed for approval.
- Steps have been included in eRPM to accommodate this process.
- PAF can still be routed concurrent with or before the proposal completion process.
- Finalize proposal steps are designed to make it clear:
 - When the proposal document is finalized and ready for submission.
 - Who is expected to submit the proposal.
 - A common location for the final proposal document.

- Submission Methods are indicated on the PAF Worksheet & can be changed using **Submission Methods** activity.
- The process for uploading final proposal documents is impacted by the Submission Method selected. Methods include:
 - eResearch submission to Grants.gov
 - Adobe submission to Grants.gov
 - Email to Sponsor
 - Other Online System (e.g. Fastlane, proposalCENTRAL)
 - Commercial Courier to Sponsor (FedEx, UPS, etc.)
 - US Mail to Sponsor
 - Fax to Sponsor
 - Other

5.16 Submission Methods *

How will the proposal document be submitted from the university to the direct sponsor?
(select all that apply)

- eResearch submission to Grants.gov
- Adobe submission to Grants.gov
- Email to Sponsor
- Other Online System (e.g. Fastlane, proposalCENTRAL)
- Commercial Courier to Sponsor (FedEx, UPS, etc.)
- US Mail to Sponsor
- Fax to Sponsor
- Other

- **PAF Worksheet** - PI/Project Team can indicate that the final proposal document is ready when completing the PAF.
 - Answer Yes to question 5.17 & complete **6.1 Final Documents for Submission** on the **Proposal Documents** page.

5.17 Are you ready to upload the final document for submission to the sponsor? * Required to Save

Yes No [Clear](#)

HELP

"Proposal Documents" are final documents that will be or have been submitted to the sponsor. If you have any other documents for review, please upload them in section 6.2.

If you answer "Yes", upload your document for submission as a PDF file on the next page.

If you answer "No", you will still be able to upload this after you route your PAF for approval, using the Finalize for Submission to Sponsor activity.

You have indicated in question 5.17 on the Routing Instructions page that your proposal documents are finalized and ready to be submitted to the sponsor. Please upload your finalized documents here.

If not all documents required by the sponsor have been finalized, please change your answer to question 5.17. You can upload these documents later by executing the *Finalize Proposal for DRDA* activity in the Manage Data section of the PAF Workspace.

If you are completing Grants.gov forms in eResearch, you do not need to upload any documents here.

Please note that by answering YES to question 5.17 and uploading any documents here, you are indicating to DRDA that all documents required by the sponsor are present, the proposal is final, and it can be submitted at any time after unit approvals are complete.

HELP

6.1 Final Proposal: *

File	Version	Browse	Title	Type
		<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>	Proposal <input type="button" value="Attach"/>

Save | Exit | Hide/Show Errors | Print... | Jump To: Final Proposal

eResearch **M** Proposal Management Edit: PAF--06-PAF00435

Save | Exit | Help>Show Errors| Print... | Jump To: Proposal Documents | Continue >>

6. Proposal Documents

Final Proposal Document

Upload the final copy of sponsor required documents in section 6.1
If the document required by the sponsor has not been finalized, you can upload it later by executing the Finalize for Submission to Sponsor activity from the PAF Workspace.

Federal Direct Sponsor
Attach only one PDF file in 6.1.

- If you are submitting to Grants.gov via Adobe, upload your proposal here.
- If you are submitting to Grants.gov via eResearch, then you do not need to upload any documents here.

Non-Federal Direct Sponsor
Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.1. The PDF should include all required sponsor documents, such as:

- Statement of Work, Abstract, etc.
- Budget
- Budget Justification

Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.
Note: by answering Yes to question 5.17 and uploading a document here, you are indicating to DRDA that the document required by the sponsor is present, the proposal is final, and it can be submitted at any time after unit approvals are complete.

Check here to indicate that the Final Proposal has been uploaded to the sponsor's system and you are unable to upload any Final Proposal documents to eResearch.

6.1 Final Documents for Submission: *

File	Version	Browse	Title	Type
		<input type="button" value="Browse"/>		Proposal

Supporting Document

If you have documents which

Federal Direct Sponsor
DRDA Administrative Sheet

- Sponsor Forms
- Budget
- Budget Justification
- Abstract or Draft of P

6.2 Supporting Document

File	Version	Browse	Title	Type
		<input type="button" value="Browse..."/>		Research Plan

Save | Exit | Help>Show Errors| Print... | Jump To: Proposal Documents | Continue >>

1. In 6.1 Final Documents for Submission, attach 1 PDF of FINAL sponsor-required documents.

– For Non-Federal Direct Sponsor, the PDF should include:

- Statement of Work/Abstract
- Budget
- Budget Justification

– For Federal Direct Sponsor, attach 1 PDF.

- Grants.gov via Adobe - Attach 1 PDF.
- Grants.Gov in eResearch, do not attach a document, but the Grants.gov application must be validated.

• **Important!** Do NOT upload internal review documents in 6.1.

2. Attach documents needed for UM Internal Review (Unit & DRDA Review) in 6.2 Supporting Documents.

The screenshot shows the '6.2 Supporting Documents' section of the eResearch Proposal Management system. The page title is '6.2 Supporting Documents:'. Below the title is a table with columns for 'File', 'Version', 'Browse', and 'Title'. The table is currently empty. Below the table, there are two columns of bullet points: 'Sponsor Forms', 'Budget', 'Budget Justification', and 'Abstract or Draft of Proposal Text' on the left; and 'Internal Budgets' and 'Other draft documents' on the right. A large number '2' is overlaid on the left side of the page. An arrow points to the 'Browse...' button in the table.

- For a Federal Direct Sponsor, attach DRDA Administrative Shell which includes:
 - Sponsor Forms
 - Budget
 - Budget Justification
 - Abstract or Draft of Proposal Text
- For Non-Federal Direct Sponsor, attach Draft Contract, Internal Budgets, Other draft documents
- **Important!** Do NOT upload the Final Proposal documents here.

Finalize for Submission for Sponsor activity is used by PI/Project Team to finalize after the PAF routed is for approval.

The screenshot shows the eResearch M interface. At the top, there is a navigation bar with 'All PAFs' and a breadcrumb trail 'All PAFs > Grape Kool-Aid Combating Fl...'. Below this, there are several sections: 'Current State' with a 'Unit Review' button; 'PAF Summary' with a 'Display PAF Summary' button; 'PAF Worksheet' with a 'View PAF Worksheet' button; and 'Manage Data' with a list of options: 'Change Primary Research Administrator', 'Finalize for Submission to Sponsor' (highlighted with a red box and a '1' in a dark square), 'Manage Administrative Personnel', 'Related PAFs', and 'Submission Instructions'.

Steps cover finalization for the following Submission Methods:

- Adobe submission to Grants.gov
- Email to Sponsor
- Commercial Courier to Sponsor (FedEx, UPS, etc.)
- US Mail to Sponsor
- Fax to Sponsor
- Other

1. Click **Finalize for Submission to Sponsor** activity.

2. Indicate that the proposal document is final & ready to be submitted to the sponsor.

2

eResearch **M** Proposal Management
Edit: PAF - 09-PAF00570

Hide/Show Errors | Print... | Jump To: Finalize for Submission to Sponsor
OK Cancel Apply

Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)

Attach only one PDF file.

- Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission.
(How do I know my Grants.gov forms are complete and valid?)

Federal Direct Sponsor	Non-Federal Direct Sponsor
Attach only one PDF file in 6.1 <ul style="list-style-type: none"> If you are submitting to Grants.gov via Adobe, upload your proposal here. 	Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.1 The PDF should include all required sponsor documents, such as: <ul style="list-style-type: none"> Statement of Work, Abstract, etc. Budget Budget Justification

HELP

Final Documents for Submission:

File	Version	Browse	Title	Type		
Delete	Final_Proposal.pdf	0.01	Browse...	Final Proposal Document	Proposal	Attach

3. Upload **1 PDF** for submission to the sponsor.

For Federal Direct Sponsor:

- Attach 1 PDF.
- Attach 1 PDF for **Grants.gov via Adobe** submission.
- No need to attach PDF for Grants.gov via eResearch.

For Non-Federal Direct Sponsor:

- Attach 1 PDF that includes:
- Statement of Work, Abstract, etc.
 - Budget
 - Budget Justification

4. Click OK.

The screenshot shows the 'eResearchM Proposal Management' interface. The title bar includes 'eResearchM Proposal Management' and 'Edit: PAF - 09-PAF00570'. A dropdown menu is set to 'Finalize for Submission to Sponsor'. A large blue box with the number '4' is overlaid on the top right. The main content area has the title 'Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)'. Below the title, there are instructions: 'Attach only one PDF file.' and a list of requirements. A checkbox is checked, indicating the proposal is in its final form. There are two sections: 'Federal Direct Sponsor' and 'Non-Federal Direct Sponsor', each with specific instructions. A 'HELP' button is visible. At the bottom, there is a table titled 'Final Documents for Submission:' with columns for File, Version, Browse, Title, and Type. The table contains one row with the file 'Final_Proposal.pdf' (version 0.01) and title 'Final Proposal Document', with an 'Attach' button next to it. A large blue box with the number '3' is overlaid on the left side of the table.

! Do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

! Make sure to click Attach.

eResearchM Grants.gov via eResearch - Method

The screenshot shows the 'eResearchM Proposal Management' interface for proposal '09-PAF00570'. The title is 'Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)'. A note states 'Attach only one PDF file.' and provides instructions: 'Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.' A checkbox is checked with the text: 'Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission. (How do I know my Grants.gov forms are complete and valid?)'. Below this are sections for 'Federal Direct Sponsor' and 'Non-Federal Direct Sponsor'. The 'Non-Federal Direct Sponsor' section includes a list of required documents: 'Statement of Work, Abstract, etc.', 'Budget', and 'Budget Justification'. At the bottom, there is a 'Final Documents for Submission' table with columns for File, Version, Browse, Title, Type, and Attach. A '2' is placed in a dark box on the left side of the instructions, and a '3' is placed in a dark box on the left side of the 'Final Documents for Submission' section.

The screenshot shows the 'eResearchM Proposal Management' interface for proposal 'SF-4240'. The title is 'Human Elasticity: How Stretching...'. The 'Application Status' is 'Valid for Submission'. There are buttons for 'View Grant Application...', 'Print Version', 'Generate PDF Version', and 'Reopen for Edit'. A '1' is placed in a dark box on the left side of the 'Application Status' section.

1. Validate Grants.gov submission

- Application Status = **“Valid for Submission”**

- Directions: http://www.umich.edu/~eresinfo/erpm/docs/PM_GrantsGov.pdf

2. Finalize for Submission to Sponsor.

3. No need to upload a PDF in 6.1 Final Documents for Submission.

- An error will occur if the Grants.gov application is not valid for submission.

1. Complete the proposal on the sponsor system.

2. Finalize for Submission to Sponsor.

3. Indicate that the proposal has been uploaded to sponsor system.

2

Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission.
(How do I know my Grants.gov forms are complete and valid?)

3

Check here to indicate that the Final Proposal has been uploaded to the sponsor's system.

eResearch **M Proposal Management** Edit: PAF - 09-...

Hide/Show Errors | Print... | Jump To: Finalize for Submission to Sponsor [OK] [Cancel]

Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)

Attach only one PDF file.

- Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission.
(How do I know my Grants.gov forms are complete and valid?)

Check here to indicate that the Final Proposal has been uploaded to the sponsor's system.

Federal Direct Sponsor	Non-Federal Direct Sponsor
Attach only one PDF file in 6.1	Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.1 The PDF should include all required sponsor documents, such as:
<ul style="list-style-type: none">• If you are submitting to Grants.gov via Adobe, upload your proposal here.	<ul style="list-style-type: none">• Statement of Work, Abstract, etc.• Budget• Budget Justification

[? HELP](#)

Final Documents for Submission:

File	Version	Browse	Title	Type
		<input type="text"/> Browse...	<input type="text"/>	Proposal

eResearchM DRDA Approved: Awaiting Final Proposal

- DRDA completes PAF Review
- Submission Instructions indicate that **DRDA will submit the proposal**
- If the proposal documents are not finalized
 - DRDA will send the PAF back to the PI & Project Team for proposal finalization
 - PI & Primary Research Administrator will receive an email
 - The PAF will be in the state:
DRDA Approved: Awaiting Final Proposal

The image shows two screenshots from the eResearchM Proposal Management system. The left screenshot displays the 'Change Submission Instructions' page for proposal 'Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)'. It includes a 'Submission Method' section with radio buttons for 'eResearch submission to Grants.gov', 'Adobe submission to Grants.gov', and 'Other'. Below this is a question: 'Will DRDA Submit this proposal?' with radio buttons for 'Yes' (selected), 'No', and 'Clear'. A red arrow points from the 'Yes' radio button to the right screenshot. The right screenshot shows the 'Current State' of the proposal, which is 'DRDA Approved - Awaiting Final Proposal'. A callout box highlights this state with the text 'DRDA Approved - Awaiting Final Proposal'. Below the callout, a message states: 'According to the PAF, the proposal documents are not yet finalized. (Click Here for more information...)'.

Change Submission Instructions
Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)

Submission Method:

- eResearch submission to Grants.gov
- Adobe submission to Grants.gov
- Other

Will DRDA Submit this proposal? Yes No

Handling Instructions for DRDA: DRDA

Will DRDA Submit this proposal? Yes No

Notes for DRDA:
Include detailed notes & instructions for DRDA....

Current State
DRDA Approved - Awaiting Final Proposal

According to the PAF, the proposal documents are not yet finalized. (Click Here for more information...)

Personnel:
Stephen Forrest UMI Principal Investigator stevefor@umich.edu 734-764-1185

Primary Research Administrator:
Pat Investigator kellydr@umich.edu null

Deadlines:
FOA Deadline: 11/20/2008
Sponsor Deadline:
DRDA Deadline:
School/College Deadline:

eResearchM Project Team Submission to Sponsor

- DRDA completes PAF Review
- Submission instructions indicate that the Project Team will submit the proposal, DRDA sends to:
 - PI & Primary Research Administrator (sent an email)
 - The PAF will be in the state:
Project Team Submission to Sponsor
- PI & Project Team must:
 - Must Finalize Proposal Documents
 - Log Project Team Submission to Sponsor

- Directions:

<http://www.umich.edu/~eresinfo/erpm/docs/PM>

[PT_LogSubmission_SS.pdf](#)

Will DRDA Submit this proposal? Yes No Clear

Email to Sponsor
 Other Online System (e.g. Fastlane, proposCENTRAL)
 Commercial Courier (e.g. FedEx, UPS, etc.)
 Mail to Sponsor
 Fax to Sponsor
 Other

Will DRDA Submit this proposal? Yes No Clear
Notes for DRDA:
Include detailed notes & instructions...

eResearchM Proposal Management
Pat Investigator | My Home | Clipboard | Logout

All PAFs
All PAFs > Color Elast
Current State
Project Team Submission To Sponsor
Summary
Display PAF Summary
PAF Worksheet
View PAF Worksheet

Current State

Project Team Submission To Sponsor

Unit Comments
Posted Comments

DRDA #: 09-PAF0158
realized. (Click Here for more information...)

Deadlines
FOA Deadline 11/20/2009
Sponsor Deadline
School/College Deadline

Primary Research Administrator:
Pat Investigator kelly@umich.edu null

eResearchM Proposal Management
Andy Administrator | My Home | Clipboard | Logout

All PAFs
All PAFs > Methodology for Color Spectrum realizations

Current State
Project Team Submission To Sponsor

PAF Summary
Display PAF Summary

PAF Worksheet
View PAF Worksheet

Manage Data
Change Primary Research Administrator
Finalize Proposal for DRDA
Manage Administrative Personnel
Related Projects
Submission Instructions

Activities
Copy PAF Info to Grants-gov Forms
Log Project Team Submission to Sponsor
Send to DRDA for Submission to Sponsor
Post a Comment for the Entire Project
Clone PAF
Acknowledge

Activities

Copy PAF Info to Grants-gov Forms
Log Project Team Submission to Sponsor
Send to DRDA for Submission to Sponsor
Post a Comment for the Entire Project
Clone PAF

DRDA Approval Status:

DRDA Approval	Approved?	Date Approved	Approval Note
Administrative Check	yes	4/1/2009	Approved
Project Representative	yes	4/1/2009	Approved
Signing Officer	yes	4/1/2009	Approved

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

Activity	Author	Activity Date
Sent to Project Team for Submission to Sponsor	Pat PIR	4/1/2009 4:06 PM EDT
DRDA Signing Officer Approved	Pat PIR	4/1/2009 4:06 PM EDT
Complete Administrative Check	Data Staff	4/1/2009 4:06 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:32 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:30 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:23 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:07 PM EDT

- **Proposal document** must be finalized before:
 - DRDA can submit to sponsor
 - or
 - Project Team Can Log Sponsor Submission
- After a PAF is routed for approval, a message on the PAF workspace indicates if:
 - is Finalized
 - or
 - is Not Finalized

According to the PI/Project Team, the proposal documents have been finalized and are ready for submission to the sponsor.

According to the PAF, the proposal documents are not yet finalized. ([Click Here for more information...](#))

The screenshot shows the 'eResearchM Proposal Management' interface for a PI. The breadcrumb trail is 'All PAFs > Color Elasticity: Fuschia's Flexibility Qualities?'. The 'Current State' section has a 'Unit Review' button. The 'PAF Summary' section displays a green message: 'According to the PI/Project Team, the proposal documents have been finalized and are ready for submission to the sponsor.' The 'PAF Worksheet' section shows details for Stephen Forrest UMI Principal Investigator, including a DRDA # of 09-PAF00158 and a deadline of 11/20/2008.

The screenshot shows the 'eResearchM Proposal Management' interface for a PAF. The breadcrumb trail is 'All PAFs > Color Elasticity: Fuschia's Flexibility Qualities?'. The 'Current State' section has a 'Unit Review' button. The 'PAF Summary' section displays a red message: 'According to the PAF, the proposal documents are not yet finalized. ([Click Here for more information...](#))'. The 'PAF Worksheet' section shows details for Stephen Forrest UMI Principal Investigator, including a DRDA # of 09-PAF00158 and a deadline of 11/20/2008.

- Need more detailed directions?
- See:
http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_Finalize.pdf