Manage Data

When a PAF is routed for approval, it is put into a non-editable state. Using Manage Data, you can change certain types of data without putting the PAF Worksheet into an editable state and creating change logs.

Note: Directions on how to use Related PAFs & Finalize for Submission to Sponsor are covered in their own procedures. See the eRPM training page: http://www.umich.edu/~eresinfo/erpm/training.html. This procedure covers:

- Add / Manage Administrative Personnel
- Submission Instructions
- View Disclosure Information

ADD / MANAGE ADMINISTRATIVE PERSONNEL

Administrative Personnel are initially entered during proposal preparation. Once a PAF has moved into the state of Unit Review, all administrative personnel including the Primary Research Administrator can be added, deleted and edit rights managed without editing the PAF worksheet using the Manage Administrative Personnel function from the Manage Data menu in the PAF Workspace.

Who Can Manage Administrative Personnel: Primary Administrators or UM Investigators who have edit permission for the PAF and Reviewers from the PAF's Administrative Home department.

PAF Workspace – Manage Data Menu

1. Click Manage Administrative Personnel from the Manage Data menu in the PAF Workspace.
2. Click **Add** on the Administrative Personnel page (not shown).
3. Enter the last name or uniqname of the person you wish to add to the PAF.
4. Click **Find**.
5. Select the person from the list.
6. Select Award Type and Permissions.
7. Click **Save**.
8. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.
The following options are available from the Administrative Personnel page:

a. **Add** administrative personnel to the PAF.

b. **Edit** permissions of personnel already on the PAF.

c. **Delete** administrative personnel listed on the PAF. (Button is not available until a person is selected).

d. Assign the **Primary Administrative Contact** to anyone currently listed as administrative personnel.

e. Assign the **Primary Post-Award Contact** to anyone currently listed as administrative personnel.

f. **Jump to** other Manage Data pages. (This can be done from any Manage Data page).
SUBMISSION INSTRUCTIONS

Submission instructions are initially entered during proposal preparation. Once a PAF has moved into the State of Unit Review, submission instructions can be managed without making changes to the PAF worksheet. It is important to keep your submission instructions up to date in order to facilitate a timely submission.

Who Can Change Submission Instructions: Primary Research Administrator or UM Principal Investigator

Submission Instructions

1. Select the applicable **Proposal Submission** options.
   - This information assists ORSP in processing your proposal.
   - Do not select both eResearch submission to Grants.gov & Adobe Submission to Grants.gov.
     - eResearch submission to Grants.gov is used when your Grants.gov forms are supported by eResearch
     - Adobe Submission to Grants.gov is used when your Grants.gov forms are NOT supported by eResearch and you must use Adobe to submit to Grants.gov.

2. If applicable, update the **Will ORSP Submit this proposal** question.

3. Enter **Notes for ORSP**.
   - Describe your submission method if you select Other.
   - Include the proposal delivery/routing contact and contact information (address, fax number, email, etc.).
   - Include any additional information for ORSP, such as:
     - Whether an institutional (cover) letter is required; ORSP Signature is required; ORSP should provide contract.
     - Indicate if this project is being proposed under a special program type, e.g. SBIR, STTR, etc.
     - Specify if these notes are award related and not related to final proposal submission to sponsor.

4. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.
Click **View Disclosure Information** from the Manage Data menu to see the status of outside interest disclosure and whether or not a conflict of interest exists for anyone with a UM Investigator role on the PAF. This data displays as view-only. For instructions on how to submit/update outside interest disclosures, see the [M-Inform Quick Reference](http://eresearch.umich.edu).

### View Disclosure Information Page

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Has Disclosed?</th>
<th>Has PHS Disclosure?</th>
<th>Has Outside Interest?</th>
<th>Last Certification Date</th>
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<tr>
<td>Sandra Investigator</td>
<td>UM Principal Investigator</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>7/31/2012</td>
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<tr>
<td>Carolyn Pappas</td>
<td>Participating Investigator with Specified Effort</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>John Investigator</td>
<td>Participating Investigator with Specified Effort</td>
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<td>Yes</td>
<td>No</td>
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<tr>
<td>Mike Randolph</td>
<td>Other Non-faculty Investigator</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
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