

## Relate PAFs

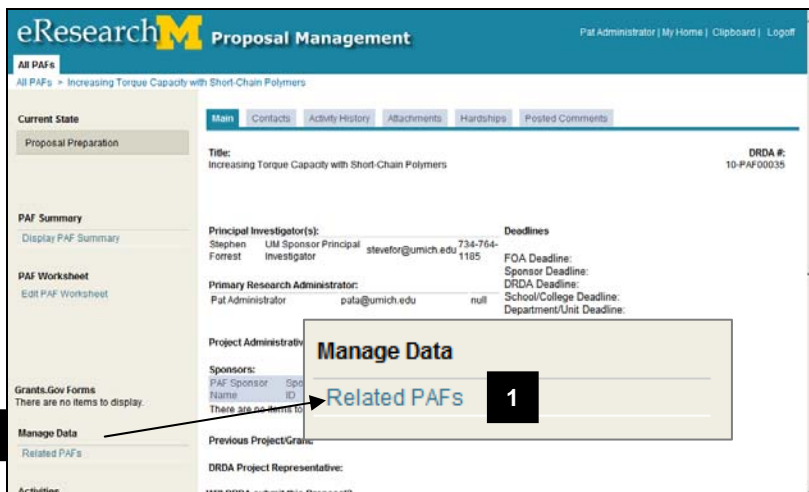
This procedure details how to relate two PAFs together. Before you begin, you need to locate the PAF you want to relate.

**Who Can Relate PAF:** Anyone with the **PI & Project Team** or **Reviewer** role with access to a PAF can relate PAFs.

### Important Information

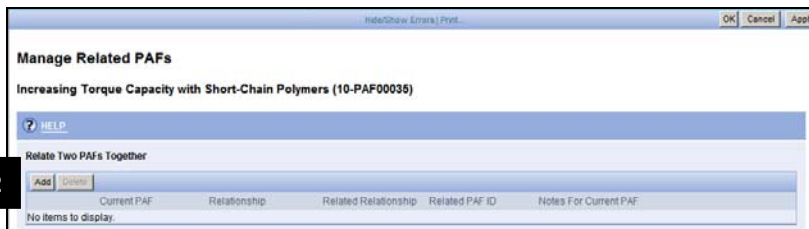
- Relate PAFs in any state.
- Relating PAFs is mainly used for reporting purposed from the eRPM data set.
- View only PAF relationships from eRPM data or specific PAFs.
- Need access to both PAFs to see the relationships from both the original PAF & its related PAF.

### PAF Workspace



1. Click the **Relate PAFs** activity from the **PAF Workspace**.

### Manage Related PAFs



2. Click **Add** to relate a PAF to the current PAF selected.

## Manage Related PAFs

3. Current PAF number appears.
4. Select **Relationship** for Current PAF.
5. Select **Related Relationship** for PAF you want to relate to the original PAF.

### Important!

What you can select depends on the Relationship selected for the Current PAF.

Relationship options include:

#### Competitive Continuation/Renewal

- An application for sponsor consideration to continue a currently active or previously funded project (by that same sponsor).
- Example: Sponsor awarded funding for a five-year project. PI wishes to apply for funding to continue funding for an additional five years.
  - This second application would be considered a Continuation or Renewal.

#### Full Proposal

- An application that is being submitted in response to a sponsor invitation following submission and review of a pre-proposal/pre-application to the sponsor.
- Must be related to a Pre-Proposal PAF.

#### Increment

- An application submitted to sponsor in order to receive continuation of funding.
- This does not undergo a competitive review process from the sponsor but does require a new PAF.

#### Main

#### Other

- The original PAF that needs another PAF related to it.
- Create your own relationship to another PAF.
- In the Notes for Current PAF field, specify the relationship.
- Creates a reciprocal relationship with the other PAF, but does not fill in the "Notes for Current PAF" on the related PAF.

#### Pre-Proposal

- Application submitted to a sponsor that includes a brief summary of the project, personnel, and budget.
- After review, some applicants are invited to submit complete, formal applications.
- Must be related to a Full Proposal PAF.

#### Project

- An application submitted to a sponsor that fits under an Umbrella Agreement.
- Must be related to an Umbrella PAF.

#### Resubmission

- An application that is being revised and submitted again for review by the same sponsor, typically altered in response to reviewer critiques of a previous submission of the application.
- Implies the sponsor made a final decision not to fund the previous version.

#### Supplement

- An application for additional funding to supplement a currently funded project (same sponsor).
- The request may cover additional work or simply increased costs of the existing project.

#### Umbrella Agreement

- An application that contains other projects or tasks within it.
- Must be used with a Project PAF.

## Manage Related PAFs

6. Select PAF to relate to.

## Find Related PAF Window

7. Enter search criteria to find the PAF to relate to. Options include:  
**Project Grant**  
**Title**  
**PI Last Name**  
**PI First Name**  
and/or  
**DRDA #.**

8. Click **Find**.
9. Select PAF to relate to.
10. Click **OK** to return to **Manage Related PAFs**.

**Related PAF Window**

11. Enter **Notes For Current PAF** if you select **Other** as a relationship.
12. Click **Save**.
13. Click **OK** to relate the PAFs together.
14. You can view the related PAF information from either the original PAF or the related to PAF. Click on Related PAFs from the PAF Workspace. This information is sent to the eRPM data set also.