Unit Review and Approve

When a PAF moves from Proposal Preparation into the state of Unit Review, each Reviewer can access that PAF from their Home Workspace.

You will receive an email with a link to the PAF if you have elected to receive notifications. Contact your Unit Liaison regarding your email notification status.

This procedure assumes that you are already logged in to eResearch Proposal Management (eRPM). If you are not familiar with the login procedure, refer to the Login to eResearch Proposal Management Step by Step Procedure.

Who Can Approve the PAF: In order to approve a PAF for a department, you must have Reviewer Who Can Sign access. If you have Reviewer access you can see that PAF that needs to be reviewed, but you cannot approve.

For more information about how your Department is set-up, see the Manage Departments tab or contact your Research Unit Liaison.

Reviewer Home Workspace Inbox tab

1. Click on the PAF Name to open the PAF Workspace.

Note: If you cannot locate the PAF:

- Make sure that you viewing the correct workspace by looking for the bolded role title under My Roles.
- Click the Upcoming tab. Any PAFs that will require your review but have not yet moved to your Inbox are located under this tab.
- Click on All PAFs and find the PAF. Refer to the Find PAFs Step by Step Procedure for more information on how to use the Filter by function.
2. Click **Display PAF Summary**.

**Note:** You can submit your unit approval or request that the project team make changes either:

- Directly on the PAF Summary.
- By returning here to the PAF Workspace using the **Unit Approve** or the **Reviewer Request Changes** activities.
If the Unit Approve button is not displayed, the following reasons may be the cause:

- The PAF is in the state of Unit Review-Project Team Making Changes. When the project team submits their changes, the state is returned to Unit Review and the Unit Approve button will be available.
- You may not have the appropriate permissions as a signer. Contact your Unit Liaison regarding your account.

If you have completed your review and are ready to submit your approval,

3. Click **Unit Approve**.

4. Click **Request Changes**.

3a. Select the department(s) for which you are granting approval

3b. Optional, enter **Comments**.

3c. Click **OK**.

4a. Select the departments on behalf of which you are requesting changes from the project team.

4b. Optional, enter **Comments**.

**Note:** Comments entered on this activity are included in the email notification sent to the PI and Primary Research Administrator.

4c. Optional, **Add** Documents. Refer to the **Attach Documents Step by Step Procedure** for more information on working with documents.

4d. Click **OK**.
Request ORSP Action

The **Project Team Request ORSP Action** activity is available to Unit Approvers, Primary Research Administrators and the Primary Post-Award Contact. It is available in the following states:

- **ORSP Review** states – PAF has been approved by all units and is being reviewed by ORSP
- **Submitted to Sponsor** state – Proposal has been reviewed by ORSP & Submitted Sponsor. Sponsor may contact PI to make changes.
- **Negotiation** state – Proposal is in negotiation. Sponsor may contact PI to make changes.
- **Active** – Project is active. Project Team may need to alert ORSP of upcoming award change.

**PAF Workspace**

1. Notice the state of the PAF. It could be:  
   - ORSP Review  
   - Submitted to Sponsor  
   - Negotiation

2. Notice that the PAF cannot be edited. **View PAF Worksheet** appears.

3. Click **Project Team Request ORSP Action** activity from PAF Workspace.

**Project Team Request ORSP Action Window**

4. Enter **Comments** that explain that you want to:
   - Request that ORSP edit the PAF  
   - Enable the project team to edit the PAF  
   - Have ORSP cancel the PAF

**Important!**

Do not use this activity to indicate finalization of the proposal document or communicate submission instructions to ORSP.

5. (Optional) Click **Add** to upload any supporting documents.

6. Click **OK** (not shown).

**Note:** Requesting to make a change does not automatically allow a project team to make changes (i.e., does not put the PAF into an editable state). The request must be approved by ORSP.

If ORSP approves, you will be able to make changes to the PAF.