eResearch Proposal Management
Update

Research Administrators Network
August 18, 2009
Phase 1 Complete - July 1, 2009
- Routing, approval and submission of proposals to external sponsors including Grants.gov
- Proposal Approval Form (PAF)
- Grants.gov proposal preparation
- Award notification
- eResearch Proposal Management data set (PRISM replacement)

Future Phases
- Internal system integration
- Budget development online tool
- Routing, approval, and submission of proposals to internal funding sources
● Ongoing - enhancements & changes

● Communicate changes using:
  - Home Work Space Message
  - Emails to eRPM-info
    - If you are not part of eRPM-info, join at: http://directory.umich.edu/

● 8/17/09 Release – Biggest Changes:
  - Updates to finalize proposal documents.
  - Comments required when requesting or submitting PAF changes.
  - Relate PAFs
  - New cloning types & rules
Pre-Proposal Versus Proposal

PAF Question 1.4 (Is this a pre-proposal?) determines the format of the PAF ID

No = Proposal
PAF ID Format = FY-PAF12345
  e.g., 10-PAF12345

Yes = Pre-proposal
PAF ID Format = FY-PRE12345
  e.g., 10-PRE12345

- Cannot change the PAF ID after you create the PAF.
- Changing this question after creating a PAF does not change the PAF ID.
- To change the PAF ID, cancel the PAF and create a new PAF.
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
Upload Final Proposal Documents – PAF Worksheet

- **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.
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.

- 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.

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.

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
Attach only one PDF file in 6.1

- If you are submitting to Grants.gov via Adobe, upload your proposal 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

Final Documents for Submission:

<table>
<thead>
<tr>
<th>File</th>
<th>Version</th>
<th>Title</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final_Proposal.pdf</td>
<td>0.01</td>
<td>Final Proposal Document</td>
<td>Proposal</td>
</tr>
</tbody>
</table>
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.

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

! Make sure to click Attach.
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.
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
- 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
Proposal document must be finalized before:
- DRDA can submit to sponsor
- 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
More Information

- Detailed directions on Finalize for Submission to Sponsor:
  http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_Finalize.pdf

- eRPM Training
  http://www.umich.edu/~eresinfo/erpm/training.html

- Submission or sponsor specific questions
  **DRDA Project Representatives**
  Phone: (734) 764-5500
  Fax: (734) 763-4053, 764-8510

- Technical support (e.g., navigation, connectivity, and system errors)
  **MAIS Help Desk**
  Phone: 734-936-7000, option 6
  E-mail: maishelpdesk@umich.edu