

### Need Help?

**Project information**, FAQs, Contact Us link  
<http://www.umich.edu/~eresinfo/pm.html>

**Training** (Online training, step-by-step procedures)  
<http://www.umich.edu/~eresinfo/erpm/training.html>

**Sandbox** (System practice environment)  
<http://www.umich.edu/~eresinfo/erpm/sandbox.html>

**ITS Service Center** (Technical support e.g., navigation, connectivity, system errors)

**Phone:** (734) 764-4357 (4-HELP) **Email:** 4HELP@umich.edu

**Hours:** Mon-Thr 7AM-7PM, Fri 7AM-6PM, Sun 2-7 PM

### ORSP Project Representatives

<http://orsp.umich.edu/orsp-staff>

**Phone:** (734) 764-5500

**Fax:** (734) 763-4053, 764-8510

### Access PAF via Email Notification

If you are accessing the PAF via an email sent from eResearch Proposal Management, click the link provided in the email, login and begin with Step 8.

### Login From eResearch Homepage

1. Go to <http://eresearch.umich.edu>.
2. Click **Login** in the Proposal Management box.
3. Enter your Login ID (username or Friend ID) and your password.
4. Click **Login**. Your Home Workspace opens.

**eResearch Action Required. Please do not reply to this message.**

The PAF referenced below requires your department's review and approval.

**Comments:**  
 PI not signed because not available until next week.

**PAF Information:**  
**DRDA Number:** 09-PAF00305  
**PAF Title:** Grants Kept Aid Top  
**PI:** Stephen Forrest  
**Project Administrative Home:** COE EECS - ECE Division  
 Primary Research Administrator: Pat Investigator

**Routed for Unit Review & Approval:** 1/14/2009 2:21 PM  
**Direct Sponsor:** Square D Company  
**Sponsor Deadline:** 2/9/2009

**Action Required:**  
 1. Click here to access the PAF: [09-PAF00305](#)  
 You may be prompted to login using your username and Kerberos password.  
 2. Click View PAF Summary to review PAF contents and supporting documents.  
 3. After review of PAF and proposal, click Unit Approve or Reviewer Request Changes.

**Recipients:**  
 This message was sent to the following:  
 Bonni Viets  
 Lisa Jones

**Questions:**  
 1. Refer to online help for information on activities in eResearch.  
 2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.  
<http://www.eresearch.umich.edu/>

### Home Workspace

5. Click on **Reviewer** from My Roles to open your Reviewer Home Workspace.
6. Click on **PAFs** to view PAFs that require your immediate action.
7. Click on the **Name** of the PAF to open the PAF Workspace.

The screenshot shows the Home Workspace interface. Step 5 points to the 'Reviewer' role in the 'My Roles' section. Step 6 points to the 'PAFs' tab in the top navigation bar. Step 7 points to a PAF entry in a table with the name 'Biostatistics Training in Cancer Research' highlighted in red.

The Reviewer Home Workspace has tabbed sections that allow you to access PAFs/Proposals, Projects and SUBKs that include your Dept ID as a reviewing department.

### PAF Workspace

8. Click **Display PAF Summary** to begin your review.

The screenshot shows the PAF Workspace for 'Biostatistics Training in Cancer Research'. Step 8 points to the 'Display PAF Summary' button. The interface includes a 'Current State' section with a 'Status map' showing 'Proposal Preparation' and 'Unit Review' stages. A message states: 'According to the PAF, the proposal documents are not yet finalized'. A navigation bar at the bottom includes 'Main', 'Contacts', 'Change Tracking', and 'Activity History'.

### Unit Approve

1. Scroll to the end of the PAF Summary page and click **Unit Approve**.
2. Select the departments for which you are granting approval.
3. Optional, enter **Comments**.
4. Click **OK**.
5. Click **OK** to close PAF Summary.

**NOTE:** You will see the Unit Approve button only if you have signing authority for your department. Your Unit Liaison can help you set up the appropriate access.

If you are reviewing only (i.e., not submitting Unit Approval), you may use either **Post a Comment for the Entire Project** or **Unit Comments** to record information regarding your review.

### Request Changes

- Use when:** You need to request that the PI & Project Team make a change during Unit Review.
- A. Click **Request Changes** from the PAF Summary.
  - B. Select the departments on whose behalf you are requesting changes from the project team.
  - C. Optional, enter **Comments**.
  - D. Optional, **Add** documents.
  - E. Click **OK**.

## Additional Activities

### Assign Ad Hoc Reviewer

1. From the PAF Workspace, click **Assign Ad Hoc Reviewer**.
2. Click ... to browse.
3. Select **Filter by** criteria.
4. Enter text

First Name	Last Name	Uniqname
<input type="checkbox"/>	Pat Andersen	mgobblue
<input type="checkbox"/>	Melinda ANDERSEN	goblue
<input type="checkbox"/>	Janet Andersen	bluemgo

5. Select one or more persons.
  6. Click **OK**.
  7. Optional, enter **Comments**.
  8. Click **OK**.
- An email will be sent to the selected ad hoc reviewers which includes a link to the PAF.

### Post a Comment for the Entire Project

1. Click the **Post a Comment for the Entire Project** activity on the PAF Workspace.
2. Enter **Comments**.
3. Optional, **Add** document.
4. Optional, Select the people to notify from the list displayed.
5. Click **OK**.

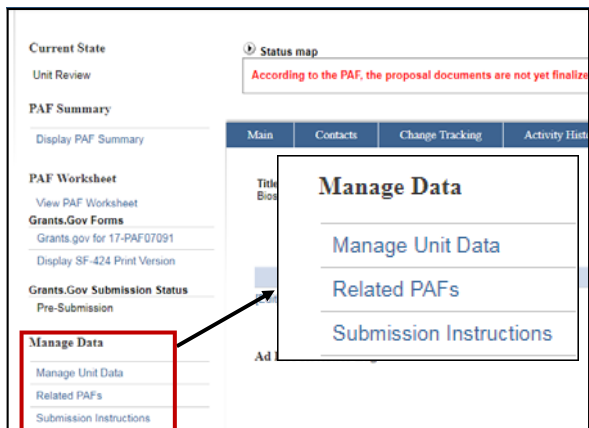
Comments posted for the entire project can be viewed by anyone who has access to the project, are permanent, and appear in both the Recent Activity section of the PAF workspace and under the Activity History tab.

### Unit Comments

1. Click the **Unit Comments** tab from the PAF Workspace.
2. Click **Edit** next to the Department for which you wish to leave comments.
3. Enter **Comments**.
4. Click **OK**.

Comments posted using Unit Comments are visible only to reviewers associated with that department.

**Manage Data**



PAF Workspace

**Related PAFs**

Click **Related PAFs** to open the Manage Related PAFs page. This page displays any PAFs that have been related to the PAF that is currently open. You can also add related PAFs and define their relationships from this page. For detailed instructions including descriptions of relationship options, see the [Relate PAFs Step-by-Step Procedures](#).

**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 by the UM Principal Investigator and Primary Research Administrator without making changes to the PAF worksheet. For more detailed instructions on how to manage Submission Instructions, see the [Manage Data Step-by-Step Procedures](#).

**Manage Administrative Personnel**

Click **Manage Administrative Personnel** to open the Administrative Personnel page. In addition to assigning the Primary Administrative Contact and/or Primary Post-Award Contact to anyone currently listed on the PAF, you can complete the following:

**Edit Permissions of Personnel** on the PAF:

1. Click **Edit** next to the name of the person whose permissions you wish to change
2. Change the relevant permissions as needed
3. Click **Save**

**Add Administrative Personnel** to the PAF:

1. Click **Add**
2. Enter the last name or unqname of the person you wish to add to the PAF
3. Click **Find**
4. Select the person from the list
5. Select **Award Type** and **Permissions**
6. Click **Save**

**Delete Administrative Personnel** on the PAF:

1. Select the checkbox next to the person you wish to delete
2. Click **Delete**
3. Click **OK** in the dialogue box that opens
4. Click **OK** to save the changes

**View Disclosure Information**

Click **View Disclosure Information** to see the status of outside interest disclosure for anyone with a UM Investigator role on the PAF. This data displays as view-only. PHS and other sponsors that follow PHS Financial Conflict of Interest Regulations require that UM Investigators disclose outside interests and that any conflicts of interest be managed.

**Subcontracts (SUBKs) and SUBK Amendments**

**Accept SUBK Management**

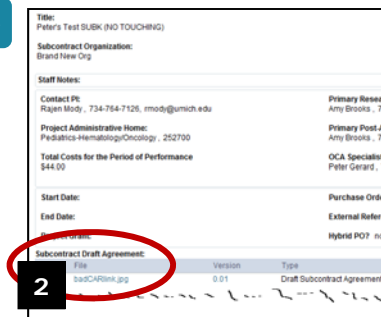
SUBKs requiring departmental acceptance of management are found under the **SUBKs** tab of your Home Workspace.

1. Click the **Name** of the SUBK from the **SUBKs Pending Acceptance from Managing Department** list to open the SUBK Workspace.
2. Click **Accept SUBK Management** from the Activities menu.
3. Click the "Check here to accept Management" checkbox in the pop-up window.
4. If desired, enter a **Comment**.
5. Click **OK**.

**SUBK/SUBK Amendment Unit Approve**

SUBKs/SUBK Amendments ready for Unit Approval are found under the **SUBKs** tab of your Home Workspace.

1. Click the **Name** of the SUBK from the **SUBKs Ready for Unit Approval** list to open the SUBK Workspace.
2. Click the link to open and review the **Subcontract Draft Agreement**.
3. Click **Unit Approve SUBK** from the Activities menu.
4. Click the checkbox to indicate that you approve the subagreement.
5. Click **OK**.



SUBK Workspace

You must accept SUBK Management before OCA can process the SUBK request.

If changes to the subcontract agreement are needed, use the **OCA Make Changes** activity and enter comments describing the necessary changes.

Find Projects

PAF Query

Use to search across all PAFs on specified criteria.

1. Click **PAF Query** from the top navigation bar of the Home Workspace.
2. Enter query criteria.  
*You may enter as many criteria as needed to refine/narrow your search.*
3. Click **Submit Query**.

Notes:

- Option to search by PAF ID and Title
- Can limit search results based on project status
- When you enter more than one criteria, your search will need to match all entries.

All My PAFs

Use to view PAFs related to your department.

1. Click **More...** from the Home Workspace, then click **All My PAFs**.
2. Select Filter criteria.
3. Enter text.
4. Click **Go**.

PAF Workspace

