Quick Reference Card for Reviewers

http://eresearch.umich.edu

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-Thur 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

2. Click Login in the Proposal Management box.
3. Enter your Login ID (uniqname or Friend ID) and your password.
4. Click Login. Your Home Workspace opens.

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.

PAF Workspace

8. Click Display PAF Summary to begin your review.

According to the PAF, the proposal documents are not yet finalized.
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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 for which you are granting approval.
C. Optional, enter Comments.
D. Optional, Add documents.
E. Click OK.
F. Click OK to close PAF Summary.

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.

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
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.
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.

Additional Activities
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Manage Data

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 uniqname 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

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.

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.

View All Award Notices

Click View All Award Notices to see list of Project Award Notices, Project Award Changes, Award is Active notification, and Award Change Requests. This data displays as view-only.

A. Click View to see award details.
B. Click the PDF icon to see version history.

View Award Status

Click View to see award details.

A. Click View to see award details.
B. Click the PDF icon to see version history.
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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, Title, and Award ID
- 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 and All My Awards**
Use to view PAFs or Awards related to your department.

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

**All Awards**
Use to search across all Awards (not just those assigned to you) on specified criteria.

1. Click **All Awards** from the top navigation bar of the Home Workspace.
2. Enter (and add) query criteria.
3. Click **Go**.

**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**.

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

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