**Login from eResearch Homepage**

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

**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.** These comments will appear under Recent Activity and be included in email if applicable.
3. Optional, **Add** document(s).
4. Optional, select people to email this comment from the list displayed.
5. Optional, click **Add under Interested Parties** to select additional ORSP staff to email.
6. Click **OK.**

**Add ORSP Notes**

**ORSP Staff Notes**

1. Click the **Edit Staff Notes** Activity.
2. Enter **Staff Notes.**
3. Indicate whether project has a paper file.
4. Enter additional details in **Description.**
5. Optional, **Add Staff Documents.**
6. Optional, **Select Email Recipients.**
7. Click **OK.**

**ORSP Project Notes**

1. Click the **Post a Project Note** Activity.
2. Enter **Project Notes.**
3. Optional, **Add** any supporting document(s).
4. Optional, select **Email Recipients.**
5. Click **OK.**

**Find Projects**

**Find PAFs**

Use to search/view ALL PAFs in eResearch. Click **All PAFs** from top blue header of the Home Workspace.
1. Select **Filter by criteria.**
   - **Note:** ID = ORSP number, Name = PAF title.
2. Enter keyword.
3. Click **Go** to display filtered list of PAFs/proposals/projects.

**Query**

Use to search for PAFs/proposals/projects based on specified advanced criteria.
1. Click **Query** from the top blue header 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** to list results on the bottom of the page.

**Review and Approve Pre-Submission**

**Administrative Check**

1. Click **Manage Sponsors** to update sponsor code and other sponsor details. See page 6 for instructions.
2. Click **Project Representative** to review assignment and change if needed. See page 6 for instructions.
3. Complete additional Administrative responsibilities as needed. If a change is needed, see pg. 2 for instructions.
4. Click **Complete Administrative Check Activity.**
5. Optional, enter **Comments.** Comments are recorded in Recent Activity on the PAF Workspace. No email is generated.
6. Click **OK.** The PAF moves into the **Project Representative Review** State.

**SUBKs- COI Policy Certification**

For each subcontracting institution listed on the PAF (PAF Workspace > **Subcontracts** tab), complete the following:
1. Click the name of the Subcontract to open the Subcontract Workspace.
2. Click the **Attachments** tab and verify a Letter of Commitment template is attached.
3. Click the name of the document to open or download the document.
4. Review institution’s response to COI Policy Certification:
   - **Note:** Based on the institution’s response, PR responds to the COI policy question by selecting 1 of 2 options during PR Approve activity:
     - “Subrecipient Has or Has Adopted PHS Compliant COI Policy.”
     - “UM Will Manage COI for Subrecipient’s Investigators.”
5. Proceed with PR/SO Review and Approve.

**PR/SO Review and Approve**

1. Click the **Project Representative Approve or Signing Officer Approve** activity.
   - If you are the Signing Officer, you can complete PR and SO Approve at the same time using either the PR Approve or Signing Officer Approve activity.
   - Click the applicable radio button to indicate subrecipient’s COI policy response.
2. Optional, enter **Comments.** Comments are recorded in Recent Activity on the PAF Workspace. No email is generated.
3. If you are completing PR Approve, update **ORSP Factors as needed.** ORSP Factors are not seen with the COI policy response.
4. Click **OK.** After PR Approval, the PAF State = **ORSP Signing Officer Review.** After SO Approval, PAF State = **ORSP Approved.**

**TIPS:**
- You do not need an MToken.
- If you need a Login ID, click **create one now.**
- Problems with your Login ID or password? Go to: [http://www.itd.umich.edu/password](http://www.itd.umich.edu/password) or [http://erpm.umich.edu/erpm](http://erpm.umich.edu/erpm) in order to use all features of eResearch.

**Important!** Enable pop-ups from [http://erpm.umich.edu/erpm](http://erpm.umich.edu/erpm) in order to use all features of eResearch.

**Important!** Comments can be viewed by anyone who has access to the project and are permanent.

**TIP:** If you are looking for an ORSP note converted from PRISM, see the **Project Notes** tab in the PAF Workspace.

**See the section at the end of this document for SUBK Requests on an Active PAF.**
Send to Project Team for Changes

1. Click the **Send to Project Team for Changes** Activity.
2. Enter **Comments** describing what changes need to be made. These comments are required and are included in a system generated email to the Primary Research Administrator and the UM PI.
3. Optional, **Add** document(s).
4. **Click OK.**

Available in following States:
- ORSP Admin Review
- PR Review
- Signing Officer Review
- ORSP Approved
- ORSP Approved - Awaiting Final Proposal
- Proposal Finalized
- Submitted to Sponsor
- Project Team Requests Action
- Post-Submission Project Team Requests Action
- Post-Submission PR Review
- Post-Submission SO Review
- Negotiation in Progress
- Post-Submission ORSP Approved

ORSP Make and Submit Changes

1. Click the **ORSP Make Changes** Activity.
2. Optional, enter **Comments**. These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
3. **Click OK.**
4. Click **Edit PAF Worksheet** to make changes to PAF information.
5. **Click ORSP Submit Changes** Activity.
6. **Select a Change Type.**
7. Enter **Comments** describing what changes were made. These comments are required and are included in a system generated email to the Primary Research Administrator and the UM PI, and to any reviewing departments who have already approved.
8. **Click OK.**

ORSP Make Changes activities available in following States:
- ORSP Administrative Review
- Project Representative Review
- Signing Officer Review
- Project Team Requests Action
- Submitted to Sponsor
- Post-Submission Project Team Requests Action
- Post-Submission PR Review
- Post-Submission Signing Officer Review
- Negotiation in Progress

ORSP Request Re-Review

1. Click the **Request Re-Review** Activity.
2. Select the **Department** that should re-review.
3. Enter **Comments** describing what needs to be reviewed. These comments are included in a system generated email to the selected department.
4. Optional, **Add** document(s).
5. **Click OK.**

ORSP Request Re-Review Activity available in following States:
- ORSP Administrative Review
- Project Representative Review
- Signing Officer Review
- Project Team Requests Action
- Submitted to Sponsor
- Post-Submission Project Team Requests Action
- Post-Submission PR Review
- Post-Submission Signing Officer Review
- ORSP Approved
- ORSP Processing
- Negotiation in Progress
- Post-Submission ORSP Approved

Send to Project Team for Finalization

Important: available in the ORSP Approved and Proposal Finalized States

1. Click the **Send to Project Team for Finalization** Activity.
2. Optional, enter **Comments**.
3. **Click OK.**

A system generated email is sent to the Primary Research Administrator and the UM PI. The PAF moves into the **ORSP Approved-Awaiting Final Proposal State.**

Note: If the project team had already finalized the proposal, this Activity will return the proposal to a Not Finalized State.

Send to Project Team for Submission to Sponsor

Important: only available in the ORSP Approved State

1. Click the **Send to Project Team for Submission to Sponsor** Activity.
2. Optional, enter **Comments**. These comments are included in a system generated email to the Primary Research Administrator and the UM PI.
3. **Click OK.**

The PAF moves into the **Project Team Submission to Sponsor State.**

ORSP Respond to Requested Action

1. Click the **Respond to Requested Action** Activity. Enter **Comments.** These comments are recorded in Recent Activity on the PAF Workspace and included in a system generated email to the Primary Research Administrator, UM PI, and Sponsor PI, if applicable.
3. Optional, click **Add** to upload applicable document(s).
4. Optional, check the **Sponsor Approval Requested** checkbox to display a message on the workspace, Sponsor Approval Pending, and list it in the Activities in Progress tab. If already checked, sponsor approval is already pending.
5. Optional, enter a more detailed **Subject Line** or leave it as is.
6. Optional, **Add** to select additional email recipients.
7. **Click OK.**

Respond to Requested Action Activity available in following States:
- Project Team Requests Action
- Post-Submission Project Team Requests Action
- Post-Award Project Team Requests Action

Submission to Sponsor

Log ORSP Submission to Sponsor

1. Click the **Log ORSP Submission to Sponsor** Activity.
2. **Click Add under Proposal Submissions.**
3. **Required, enter Submission Date.**
4. Optional, select **Submission Method**, enter **Notes**, **Tracking Number** and **Submission Recipient.**
5. **Click OK.**
6. Optional, **Add** under **Documents** to upload additional files.
7. **Click OK in the Log ORSP Submission Activity.**

The first time you complete this Activity, the PAF moves into the State of Submitted to Sponsor. The Activity remains available for logging additional submissions.

Review **Submission Instructions** from the **Manage Data** menu in the PAF Workspace.

If ORSP is submitting, then
1. Has the proposal been finalized?
   - If yes ➔ use **Log ORSP Submission to Sponsor** Activity
   - If no ➔ use **Send to Project Team for Finalization** Activity
2. Are there any special instructions indicated?

If Project Team is submitting ➔ use **Send to Project Team for Submission to Sponsor** Activity

Submission Checklist:

- **Send to Project Team for Submission to Sponsor** Activity.
- **ORSP Make Changes** Activity.
- **ORSP Request Re-Review** Activity.
- **ORSP Respond to Requested Action** Activity.

ORSP Reference Card

Pg 2

Last Revision Date: 2/18/2015
1. **Record Initial Award Information**

**Current State:** Submitted to Sponsor

1. Click the Record Initial Award Information Activity.
2. Enter any known award information.
   
   **Notes:** Enter all dates with 4 digit years. The Federal Award Id Number (FAIN) can be added here or in the Awarded section.
3. Click OK.
   
   Upon completion of this Activity, the PAF moves into the ORSP Processing State and commitment information can be entered.

2. **Award Information — 1st Commitment**

**Current State:** ORSP Processing

1. Click Award Information (listed under Manage Data).
   
   The Manage Award Information page opens.

   
   ![Image of Manage Award Information page]

2. **Awarded Section:**
   
   2a. Review and edit award fields.
   
   **Note:** Enter all dates with 4 digit years.
   
   2b. Click on U of M to display awarded cost sharing if applicable.
   
   2c. Click Copy from Proposed to add cost sharing from the Proposed to the Awarded section.
   
   **Note:** Cost Sharing copied from the Proposed section displays.
   
   2d. Click Add to add new line of cost sharing.
   
   2e. Click Save after entering data.
   
   2f. Click Finish to return to Award Information.

3. **Commitments Section:**

   On 1st Commitment line:
   
   3a. Click Edit.
   
   3b. Enter date, IDC rate and sponsor dollars information or click Copy Award to Commitment.
   
   **Note:** Enter all dates with 4 digit years.
   
   3c. Click Award Reference.
   
   - Enter Direct and Prime sponsor information.
   
   - **Tip:** Any Note entries will appear on Award Information, PAN & PAC.
   
   - Click Finish to return to Award Information.
   
   3d. Click U of M to display Cost Sharing (Committed Period) information.
   
   3e. Click Copy from Award to add cost sharing from the Awarded section.
   
   3f. Click Add to add new line of cost sharing.
   
   3g. After entering data, be sure to click Save.
   
   3h. Click Finish to return to Award Information.
   
   3i. Click Save.

4. Click OK at bottom or top of Manage Award Information page.

---

### Manage Factors

Factors can be managed at any point in the process.

1. Click Manage Factors.
2. Add or edit information as needed.
3. Select ORSP-Related Factors as needed and verify Disclosure Info for UM Investigator(s).
   
   **Note:** Disclosure Info should be: Has Disclosed? = Yes; Has PHS Disclosure = Yes.
4. Optional, enter Factor Notes.
5. Click OK.

---

On all subsequent Commitment lines:

- Use the Copy Award Reference Numbers button if the number is the same as the previous commitment.
3. Request PGN

Current State: ORSP Processing

1. Click the Request PGN Activity.
2. Optional, enter Comments. These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
3. Click OK.
   - The PAF moves into the State of FinOps PGN Processing.
   - When FinOps completes their activities, the PAF will again be in the ORSP Processing State.

4. Award Information — Associate PGNs

Current State: ORSP Processing

1. Click Award Information from the Manage Data menu.
2. Commitments Section:
   2a. Click Edit.
   2b. Click Project/Grant.
   2c. Select the appropriate project/grant.
   2d. Click Finish.
3. Click Save to display the Manage Notices button.

5. Award Information — Manage Notices

Current State: ORSP Processing.

Note: Much of the information on the Project Award Notice/Change is populated by your activities to Record the Initial Award Information or Award Information.

1. Click Award Information from the Manage Data menu.
2. Commitments Section: Click Manage Notices to open the Award Notice window.
3. Click Edit or Add New.
4. Select Notice or Change Type at the top of page.
5. Select Award Signature type.
6. Attach Award Documents.
7. Enter PAN/PAC notes (optional).
8. Click OK on Award Notice.
9. Click OK on the Manage Notices window.
10. Click OK at bottom of the Manage Award Information page.

6. ORSP Staff: Request PR Signoff

Current State: ORSP Processing

1. Click the Request PR Signoff Activity.
2. Optional, enter Comments. These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
3. Click OK.

7. PR Signoff

Current State: ORSP Processing

1. Click PR Signoff from the Manage Data menu.
2. Click Edit.
   - Note: If you require a hold, follow the PR Project Hold steps.
   2a. Review information.
   2b. Edit or enter PAN/PAC Notes.
   2c. Select each factor checkbox under the section titled: SIGNOFF ON EACH OF THE FOLLOWING
   2d. Optional, enter PR Signoff Comments.
   Comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
2e. Select Check here to signoff under PROJECT REPRESENTATIVE AWARD NOTIFICATION SIGNOFF
   2d. Click OK to close Award notice.
3. Click OK on the PR Signoff page.

---

Release Award Information

Use to send award notification/change email to PAN/PAC recipients

Current State: Contracts Administration Processing, ORSP Processing, FinOps Processing

1. Click the Release Award Information Activity.
2. Select award to release from list.
3. Click OK.

Send Project to FinOps

Current State: ORSP Processing

1. Click the Send to Financial Operations Activity.
2. Optional, enter Comments. These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
3. Click OK. The PAF moves into the FINOps Processing State and allows FINOps to activate the PGN. Project will move to Active State after the PGN is activated by FINOps.

---

Send Contract to PI for Signature

Current State: ORSP Processing

1. Click the Send Contract to PI for Signature Activity.
2. Optional, enter Comments. These comments are recorded in Recent Activity on the PAF Workspace and a system-generated email notification is sent.
3. Click OK.

Send Award Information to Contracts Admin

Current State: ORSP Processing

1. Click the Send to Contracts Administration Activity.
2. Optional, enter Comments. These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
3. Click OK.

---

PR Project Hold

To place the project on hold:
1. Click PR Signoff Activity.
2. Click Edit.
3. Select Check here to put project on hold.
4. Optional, enter PR Signoff Comments.
5. Select Check here to signoff under PROJECT REPRESENTATIVE AWARD NOTIFICATION SIGNOFF
6. Click OK to close Award notice.
7. Click OK. A notice will be added to the PAF Workspace to indicate the Hold status.

PR Hold

If both the Hold and Approve checkboxes are selected, then the State will change to ORSP Hold or Post-Award ORSP Hold.

If only the Hold checkbox is selected, the State will remain ORSP Processing or Post-Award Processing.

---

Remove Project Hold

1. Click the Release ORSP Hold Activity.
2. Optional, enter Comments.
3. Click OK.
Changing Project Information

Current State: Active or Post-Award Project Team Requests Action

1. Click the Process Project Change Activity. The project moves to the Post-Award ORSP Processing State.
2. Optional, enter Comments.
3. Click OK.
4. Click Change Project Information from the Manage Data menu.
5. Make changes as needed to:
   - Proposal Title and Long Title
   - Proposal Type/Class Code
   - Administrative Home
   - Sponsor Solicitation Number
   - Previous Grant Number.
6. Click OK.
7. If your change requires a PAC, follow the Processing Award Changes instructions below.
   
   If your change does not require a PAC, click Complete Project Change Processing to return the project to the Active State.

Changes can be viewed under the Change Tracking tab of the PAF Workspace.

Processing Award Changes

1. Click the Process Project Change Activity.
2. Click Award Information.

Based on the type of PAC needed, complete any or all of the following. The detailed instructions for these steps are on pages 3-4 under Award Processing.

- Add New Commitment.
- Request PGNs.
- Associate PGNs.
- Manage Notices.
- Request PR Signoff
- PR Signoff
- Process for Contracts
- Release Award Change
- Send Award Change to FinOps.
- If a PI change is needed, see the PAC for PI directions.

IMPORTANT:
- Changes to the Proposal Title do not update the Long Title. Be sure to update Long Title when you change the Proposal Title. The Long Title appears on PACs.
- Do not change the sponsor Solicitation number for Grants.gov opportunities as this information is stored elsewhere.

PAC for PI Change

Use to modify any UM Investigator listed on the PAF or to add UM Investigators to the PAF. This is a 3-stage process:

- Change Active PI
- Post Comment/Send PI email
- Process Award Change

CHANGE ACTIVE PI

1. Click Manage UM Investigators from the Manage Data menu.

Add New PI

1. Click Add.
2. Enter PI uniqname or last name.
3. Click Find.
4. Select PI name.
5. Select Role.
6. Optional, select Edit Permissions.
7. Optional, enter Sponsor Role.
8. Click Save.
9. Click Add Appointments to look up appointments from the HR system.
10. Click Add to PAF to select the appropriate appointment OR Enter a future appointment. & click Add to PAF.
11. Click OK to return to Manage UM Investigators view.
12. Click OK.

Deactivate Old PI (DO NOT DELETE)

1. Click Edit next to PI Name.
2. De-select Active checkbox.
3. Enter the Deactivate Date (appears below Sponsor title).
   Note: Enter the date using a 4 digit year.
4. Click Save.
5. Click OK.

POST COMMENT/NOTIFY PI SIGN PAF

1. Click Post a Comment for the Entire Project from the Activities menu.
2. Enter Comment instructing PI to sign the PAF/Conflict of Interest Statement.
3. Optional, Add Documents.
4. Select PI name from the list displayed to email this Comment.
5. Click OK.

Follow the Processing Award Changes steps. The PR will not be able to sign the PAC until the PI has signed the PAF.

Negotiation

1. Click the Negotiation in Progress Activity.
2. Optional, enter Comments.
   These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
3. Click OK.
   The PAF moves into the Negotiation in Progress State.

End Negotiation

There are a number of activities that can be used in the State of Negotiation in Progress that will "end" the negotiation.
**View Department Information**

Use to view department roll-up structure (approval hierarchy) Reviewers, Reviewers Who Can Sign (Approvers), and email contact(s).

1. Click Depart Info from top blue header of the Home Workspace.
2. All Department IDs display. Use the Filter By to search for the Department you want to view.
3. Click Department Information next to the department you want to view.
4. Click OK when you are done viewing the information.

**ORSP—Coverage**

Use to view PAFs/projects of any other ORSP staff member.

1. Click ORSP Coverage role.
2. Use the Filter By to search for PAFs/Projects in either the PR or Staff tabs. Remember: Search by PR, eRPM does not have a way to search by Support Staff.

**ORSP Project Representative**

Use to change the ORSP Project Representative on the project.

1. Click ORSP Project Representative (listed under Manage Data).
2. Select Project Representative from list.
3. Click OK.

**Manage Sponsors (Admin Check)**

Use to add, edit, and delete Project Sponsor Information.

1. Click Manage Sponsors from the Manage Data menu.
2. Click the initial information was entered by the Project Team).
3. Enter PAF Name (name of the sponsor as entered on the PAF Worksheet).
4. Select sponsor Type.
5. If known, enter the ID number for the sponsor OR
   3a. Click Browse.
   3b. Enter search criteria.
   3c. Click Find.
   3d. Select Sponsor.
   3e. Click OK.

OR Select Not Found if you cannot find the Sponsor ID after searching for it.
6. Enter Notes (optional).
7. Click Save.
8. Enter Sponsor Acknowledgement Number (optional).
9. Enter CFDA Number (optional).
10. Click OK.

**Manage Documents**

Use to add or delete Final Proposal, Pre-Award, Post-Award, ORSP-only, and Historical Documents.

Add new document(s):

1. Click Manage Documents from the Manage Data menu.
2. Click Browse in the empty line.
3. Find and add document.
4. Enter Title.
5. Select Type.
6. Enter Attachment.
7. Click OK.

Delete document(s):

1. Click Delete in front of a document.
2. Click OK to confirm you want to delete the document.

**Manage Factors**

Use to set or update a COI flag (Y/N) to notify a POI Committee to review a PAF for a potential conflict of interest.

1. Click Manage Factors from the Manage Data menu.
2. Select applicable Sponsor Programs.
3. Optional, enter OTHER Sponsor Program Description.
4. Click OK.

**Manage Sponsor Program Types**

Use to indicate optional reporting information for the project.

1. Click Manage Sponsor Program Types from the Manage Data menu.
2. Select applicable Sponsor Programs.
3. Optional, enter OTHER Sponsor Program Description.
4. Click OK.

**Manager PGN**

Use to add or delete Project Grant Numbers view.

1. Click Manage Proposal Project/Grants from the Manage Data menu.

**Conflict Of Interest Management**

Use Manage Factors to set or update a COI flag (Y/N) to notify a COI Committee to review a PAF for a potential conflict of interest.

There are two COI flags:

- **PAF Conflict of Interest** — verify or change the PIs COI response.
- **ORSP Conflict of Interest** — indicate need to review whether U-M has an institutional conflict of interest (e.g. with sponsor, start-up, etc.).

Enter Comments as applicable for the COI Committee.

**FOIA Letter**

1. (Staff or PR) Click the Create FOIA Letter activity and select the time period. Then click OK.
2. If created by Staff, click Route for PR Review. Otherwise, skip to step 3.
3. (Staff or PR) If desired, click Edit FOIA Letter and make any necessary changes, or click PR Request Changes to request that ORSP Staff make changes.
4. (PR only) Click Route to FOIA Office, verify or edit the Letter Date, enter optional Comments, and then click OK.

**PAF-R**

PAFs are handled outside of eResearch.

1. Click Manage Factors from the Manage Data menu.
2. Add or edit information as needed.
3. Select ORSP Factors as needed.
4. Optional, enter Factor Notes.
5. Click OK.

TIPS for Working in Views (Items listed under Manage Data):

- Click OK to save changes and return to PAF Workspace.
- Click Apply to save changes and redisplay page.
- Use Jump to navigation to display other view pages.

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- Click Apply to save changes and redisplay page.
- Use Jump to navigation to display other view pages.
### PGN Summary

Use to display all PAFs that have commitments and notices associated to a specified PGN. (Active, In Progress, and Previous)

1. Click the PGN Summary from top blue header of the Home Workspace.
2. Enter PGN. Important! You must enter the complete PGN. Partial or Wildcard searches are not available here.
3. Click Find.

Working within the PGN Summary

- Click Expand All to display all commitments and notices for every PAF displayed. Clicking Collapse All will hide the commitment and notice information.
- To open a PAF workspace in a separate window, click on the PAF ID from the summary display.
- To display commitment information for a PAF, click the arrow in front of the PAF ID.
- To display notice information for that commitment, click the arrow in the commitment line.
- To open a notice in a separate window, click the .pdf icon (or the word “view”).
- To open a PAF workspace in a separate window, click on the PAF ID from the summary display.
- To display commitment information for a PAF, click the arrow in front of the PAF ID.
- To display notice information for that commitment, click the arrow in the commitment line.
- To open a notice in a separate window, click the .pdf icon (or the word “view”).
- To open a version history for a notice, click on the version number, i.e., 0.05.

### ORSP Cancel PAF

1. Click ORSP Cancel PAF from the Activities menu.
2. Enter Date Cancelled.
3. Optional, enter Comments. These comments are recorded in Recent Activity on the PAF Workspace and included in an email.
4. Click OK. The PAF moves into the state of Cancelled and an email is sent to PAF notifiers in departments that have approved and to the PI and Primary Research Administrator.

<table>
<thead>
<tr>
<th>ORSP Cancel PAF activity available in following States:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• ORSP Making Changes</td>
</tr>
<tr>
<td>• Project Team Submission to Sponsor</td>
</tr>
<tr>
<td>• Expedited Submission ORSP Review</td>
</tr>
<tr>
<td>• Expedited Submission</td>
</tr>
<tr>
<td>• ORSP Approved– Awaiting Final Proposal</td>
</tr>
<tr>
<td>• ORSP Review-Project Team Making changes</td>
</tr>
<tr>
<td>• Record Paper PAF</td>
</tr>
<tr>
<td>• Project Team Requests Action</td>
</tr>
<tr>
<td>• ORSP Project Representative Review</td>
</tr>
<tr>
<td>• ORSP Administrative Review</td>
</tr>
<tr>
<td>• ORSP Signing Officer Review</td>
</tr>
<tr>
<td>• Proposal Finalized</td>
</tr>
<tr>
<td>• ORSP Approved</td>
</tr>
</tbody>
</table>

### Project Team Requests ORSP Action

Current State: Project Team Requests ORSP Action

If you receive a request from the Project Team for ORSP Action, carefully read the comments to determine why the Project Team requested ORSP action.

- Use the Respond to Requested Action activity to communicate back to the Project Team what action, if any, is needed. Comments are recorded and included in a system generated email to the UM PI, Primary Research Administrator & Primary Post-Award Contact, Sponsor PI, and additional selected email recipients, if applicable.
- Note: Checking the Sponsor Approval Requested checkbox indicates action is taken outside eRPM, displays a message on the workspace, and lists the PAF in the Project Representative’s Action in Progress tab until the Record Sponsor Action activity is completed.

Depending on the request, your next activity may be one of the following:

**Request Reasons:**

1. ORSP edit the PAF
2. ORSP enable the project team to edit the PAF
3. ORSP cancel the PAF
4. ORSP record Turn Down or Withdrawal

<table>
<thead>
<tr>
<th>ORSP Activity Response:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ORSP Make Changes &amp; ORSP Submit Changes</td>
</tr>
<tr>
<td>2. Send to Project Team For Changes</td>
</tr>
<tr>
<td>3. ORSP Cancel PAF</td>
</tr>
<tr>
<td>4. Turn Down/Withdrawal</td>
</tr>
</tbody>
</table>

### Project Closeout

**The Process Closeout Activity is available in the following States:**

- Active
- Post-Award Project Team Requests Action

1. Click Process Closeout from the Activities menu.
2. Optional, enter Comments.
3. Optional, click Add to attach any documents.
4. Click OK. Upon completion of this Activity, the project moves into the Closeout State.

### Close Project

1. Click Close Project from the Activities menu.
2. Enter Date Closed.
3. Optional, enter Comments.
4. Click OK. Upon completion of this Activity, the project moves into the Closed State.
SUBK Requests on an Active PAF

SUBK records display in the PR’s Awards Inbox tab prior to OCA review if:

- The PAF is PHS-Sponsored and the required COI questions are not answered.
- The SUBK is created after the PAF has been submitted to sponsor.
- On a SUBK Amendment Request, the Project Team indicates that a SUBK Investigator is changing and ORSP assistance is needed.

1. Click the name of the SUBK from the Awards Inbox tab.
2. Click the Project Representative Approve SUBK activity.
3. Answer the two questions that display.
   
   Notes:
   - The first question has already been answered by the Project Team, but can be edited by the PR, if needed. The PR answers the second question to indicate approval to add the subcontract to the PAF.
   - If it is a PHS-Sponsored PAF then additional COI questions will appear on the activity. Only the first COI question is required (indicated by a red asterisk *).

4. Optional, enter Comments in the field provided.
5. If this is a PHS-Sponsor then additional COI questions will appear on the activity. Only the first question is required.
6. Click OK.