

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) and your password.
4. Click **Login**. Your Home Workspace opens.



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/>

Important! Enable pop-ups from <http://erpm.umich.edu/erpm> in order to use all features of eResearch.

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 DRDA staff to email.
6. Click **OK**.

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

Add DRDA Notes

DRDA 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**.

Staff notes & documents are viewable by DRDA only in the **DRDA Activities** section of the Main tab of the project workspace.

DRDA Project Notes

1. Click the **Post a Project Note** activity.
2. Enter **Project Notes**.
3. Optional, select **Email Recipients**.
4. Click **OK**.

Project notes are viewable by DRDA, FinOps, and Contracts Administrations in the Main tab of the project workspace under **Project Notes** section.

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

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** = DRDA number, **Name** = PAF title.
2. Enter keyword.
3. Click **Go** to display filtered list of PAFs/proposals/projects.

TIPS:

- Use a percent sign as a wildcard (%) to specify parts of a word. For example, **%Smi%** will return any names that include "smi" anywhere in the name. **Smi%** will include any names that begin with "Smi".
- Clicking **Advanced** allows 2 more Filter by criteria.

Query

Use to: Search for PAFs/proposals/projects based on specified advanced criteria.

1. Click the **Query** tab on Home Workspace.
2. Enter **query criteria**.
For example, Project Grant number is known. You may enter as many criteria as needed to refine/narrow your search.
3. Click **Submit Query** to list query results on the bottom of the page.

Note:

- When you enter more than one criteria, your search will need to match all entries.
- For example, if you enter a PGN (F123456) and a PI Last Name (Smith) for your query, the result list will only display projects that equal both entries (i.e., PGN=F123456 "AND" PI Last Name=Smith.)

Review and Approve Pre-Submission

Administrative Check

1. Use the **Manage Sponsors** view to update sponsor code and other sponsor details.
See page 6 for instructions on how to complete this step.
2. Review **DRDA Project Representative** assignment and change if needed.
See page 6 for instructions.
3. Complete additional Administrative responsibilities as needed.
If a change is needed, follow instructions on page 2.
4. Click the **Complete Administrative Check** activity.
5. Optional, enter **Comments**.
These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
6. Click **OK**. The PAF moves into the **DRDA Project Representative Review** state.

PR/SO Review and Approve

1. Complete review responsibilities as needed. If a change is needed, follow instructions on page 2.
2. 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 the **Signing Officer Approve** activity.
3. Optional, enter **Comments**.
These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
4. If you are completing PR Approve, update **DRDA Factors** as needed. DRDA Factors are not seen with the **Signing Officer Approve** activity.
5. Click **OK**. After PR Approval, the PAF moves into the state of **DRDA Signing Officer Review**. After SO Approval, the PAF moves into **DRDA Approved** state.

TIP: PR and SO Approve are also available via the PAF Summary.

Changes and Requests

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** documents.
4. Click **OK**.

Available in following States:

- Submitted to Sponsor
- Project Team Requests Action
- DRDA Admin Review
- Post-Submission Project Team Requests Action
- DRDA PR Review
- Post-Submission PR Review
- DRDA SO Review
- Post-Submission SO Review
- DRDA Approved
- Negotiation in Progress
- DRDA Approved - Awaiting Final Proposal
- Post-Submission DRDA Approved
- Proposal Finalized

DRDA Make and Submit Changes

1. Click the **DRDA 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 **DRDA 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**.

DRDA Make Changes activities available in following States:

- DRDA Administrative Review
- DRDA Project Representative Review
- DRDA 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

DRDA Request Re-Review

1. Click **Request Re-Review** activity.
2. Select the Department who 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** documents.
5. Click **OK**.

DRDA Request Re-Review activity available in following States:

- DRDA Administrative Review
- Post-Submission PR Review
- DRDA Project Representative Review
- Post-Submission Signing Officer Review
- DRDA Signing Officer Review
- DRDA Approved
- Project Team Requests Action
- DRDA Processing
- Submitted to Sponsor
- Negotiation in Progress
- Post-Submission Project Team Requests Action
- Post-Submission DRDA Approved

Decline Requested Action

1. Click the **Decline Requested Action** activity.
2. Enter **Comments** describing the reason for the decline. These comments are included in a system generated email to the Primary Research Administrator and the UM PI.
3. Click **OK**.

Decline Requested Action activity available in following States:

- Project Team Requests Action
- Post-Submission Project Team Requests Action
- Post-Award Project Team Requests Action

No System Action Required

Use to: Respond to a request for action from the Project Team that does not require any system action.

1. Click the **No System Action Required** activity.
2. Enter **Comments** describing the reason the action request is not being accepted. These comments are recorded in Recent Activity on the PAF Workspace. No email is generated by the system.
3. Click **OK**.

No System Action Required activity available in following States:

- Project Team Requests Action
- Post-Submission Project Team Requests Action

Submission to Sponsor

Submission Checklist:

Review **Submission Instructions** under **Manage Data** (project workspace).

If **DRDA is submitting**, then

1. **Has the proposal been finalized?**
If **yes** ⇒ use activity: Log DRDA Submission to Sponsor
If **no** ⇒ use activity: Send to Project Team for Finalization
2. Are there **any special instructions** indicated?

If **Project Team is submitting** ⇒ use activity: **Send to Project Team for Submission to Sponsor**

Send to Project Team for Submission to Sponsor

Important: only available in the **DRDA 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.

Log DRDA Submission to Sponsor

1. Click the **Log DRDA Submission to Sponsor** activity.
2. Click **Add**.
3. Required, enter **Submission Date**.
4. Optional, select **Submission Method**.
5. Optional, enter **Notes**, **Tracking Number** and **Submission Recipient**.
6. Click **OK** on the window & Click **OK** on the page. 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.

Send to Project Team for Finalization

Important: available in the **DRDA 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 **DRDA 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 status.

Award Processing

1 Record Initial Award Information

Current State: **Submitted to Sponsor**

1. Click the **Record Initial Award Information** activity.
2. Enter any known award information.
Note: Enter all dates with 4 digit years.
3. Click **OK**.
Upon completion of this activity, the PAF moves into the **DRDA Processing** state and commitment information can be entered.

Manage Factors

Factors can be managed at any point in the process.

1. Click **Factors**.
2. Add or edit information as needed.
3. Select **DRDA Factors** as needed.
4. Optional, enter **Factor Notes**.
5. Click **OK**.

2 Award Information — 1st Commitment

Current State: **DRDA Processing**

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

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. After entering data, click **Save**.
- 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 in 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).

- 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.

On all subsequent Commitment lines:

- Use the **Copy Award Reference Numbers** button if the number is the same as the previous commitment

Award Processing (continued)

3 Request PGN

Current State: **DRDA 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 DRDA Processing state.

TIP: If you already have a have a P/GN that needs to be entered, use **Manage Proposal Project/Grants** (under Manage Data).

4 Award Information — Associate PGNs

Current State: **DRDA Processing**

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

6 DRDA Staff: Request PR Signoff

Current State: **DRDA 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: **DRDA Processing**

1. Click **PR Signoff** (listed under **Manage Data**).
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, DRDA 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: **DRDA 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 & allows FINOps to activate the PGN. Project will move to **Active** state after PGN activated by FINOps.

CONTRACTS ONLY

Send Contract to PI for Signature

Current State: **DRDA 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. No email is generated by the system.
3. Click **OK**.

Send Award Information to Contracts Admin

Current State: **DRDA 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 HOLD

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 **DRDA Hold or Post-Award DRDA Hold**.
- If the **hold checkbox only** is selected, then the state will remain **DRDA Processing or Post-Award Processing**.

Remove Project Hold

1. Click the **Release DRDA Hold** activity.
2. Optional, enter **Comments**.
3. Click **OK**.

Project Award Changes

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 DRDA Processing** state.
2. Optional, enter **Comments**.
3. Click **OK**.
4. Click **Change Project Information** (under Manage Data)
5. Make changes as needed to:
 - Proposal Title & 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.**
8. 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/Project Workspace.

IMPORTANT:

- Changes to the **Proposal Title** do not update the **Long Title**. Make 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.

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 bulleted items. 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.

PAC for PI Change

This is a 3-stage process:

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

CHANGE ACTIVE PI

1. Click **Key Project Personnel**.

Add New PI,

1. Click **Add**.
2. Enter **PI** unqiename 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 Key Personnel.
12. Click **OK**.

Deactivate Old PI (DO NOT DELETE),

1. Click **Edit** next to PI Name.
2. De-select checkbox **Active**.
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 the **Post a Comment for the Entire Project** activity.
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

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.

General

View Department Information (E.g. Reviewers)

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

1. Click **Department Information** tab (last tab on 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.

DRDA—Coverage

Use to: View PAFs/projects of any other DRDA staff member.

1. Click **DRDA 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.

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.

DRDA Project Representative

Use to: Change the DRDA Project Representative on the project.

1. Click **DRDA 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** (listed under **Manage Data**).
2. Click **Edit** (the initial information was entered by the Project Team).
3. Enter **PAF Name** (name of the sponsor as entered on the PAF Worksheet).
3. Select sponsor **Type**.
4. 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**.

TIP: To delete a sponsor, check the box in front of the sponsor & click the **Delete** button.

OR

Select **Not Found** if you cannot find the Sponsor ID after searching for it.

5. Enter **Notes** (optional).
6. Click **Save**.
7. Enter **Sponsor Acknowledgement Number** (optional).
8. Enter **CFDA Number** (optional).
9. Click **OK**.

Note: If you select **Not Found**, a Sponsor ID will need to be assigned before the Project is awarded.

FOIA Letter

1. Click **FOIA Letter** (listed under **Manage Data**).
2. Enter date with a 4 digit year (upper right corner).
3. Select duration (drop down list).
4. Click **Apply**.
5. Click **Print**.

Available after initial award is recorded.

PAF-R

PAF-Rs are handled outside of eResearch.

Manage Factors

1. Click **Manage Factors** (listed under **Manage Data**).
2. Add or edit information as needed.
3. Select **DRDA Factors** as needed.
4. Optional, enter **Factor Notes**.
5. Click **OK**.

Manage Sponsor Program Types

Use to: Indicate optional reporting information for the project.

1. Click **Manage Sponsor Program Types** (listed under **Manage Data**).
2. Select applicable **Sponsor Programs**.
3. Optional, enter **OTHER Sponsor Program Description**.
4. Click **OK**.

Manage PGN

1. Click **Manage Proposal Project/Grants** (listed under **Manage Data**).

To Edit PGN:

To Add a PGN:

- a. Click **Add**.
- b. Click **Browse**.
- c. Enter search criteria.
- d. Click **Find**.
- e. Select PGN.
- f. Click **OK**.
- g. Modify **Is Parent?** if applicable.
- h. Enter **Short Cd**.
- i. Click **Save**.

- a. Click **Edit**.
- b. Edit fields as needed.
- c. Click **Save**.

2. Click **OK** to close the Manage Project Grant Numbers view.

Manage Documents

Use to: Add or delete Final Proposal, Pre-Award, Post-Award, DRDA-only, and Historical documents.

Add a NEW document,

1. Click **Manage Documents** (listed under **Manage Data**).
2. Click **Browse** in the empty line*
3. Find and add document.
4. Enter **Title**.
5. Select **Type**.
6. Click **Attach**.
7. Click **OK**.

*Add a new VERSION to an existing document, click **Browse** in the existing line and follow steps 2-5.

Delete Document(s),

1. Click delete in front of a document.
2. Click **OK** to confirm you want to delete the document(s).

Delete removes/deletes all versions of a document & cannot be restored.

Conflict Of Interest Management

For **non-Medical School PAFs**,

Send an e-mail to Lynn Cook

- Indicate the DRDA number assigned to each PAF with Conflict of Interest positive responses.
- Lynn will be able to retrieve the PAFs from eRPM. No need to send copies.

For **Medical School PAFs**,

No need for any DRDA action.

- Reports from the Medical School Grants Office are sent to Dana Burkley listing relevant PAFs. She will be able to retrieve these PAFs from the system.




General (Continued)

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 version history for a notice, click on the version number, i.e., 0.05.

DRDA Cancel PAF

1. Click the **DRDA Cancel PAF** activity.
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.

DRDA Cancel PAF activity available in following States:

- DRDA Making Changes
- Project Team Submission to Sponsor
- Expedited Submission DRDA Review
- Expedited Submission
- DRDA Approved– Awaiting Final Proposal
- DRDA Review-Project Team Making changes
- Record Paper PAF
- Project Team Requests Action
- DRDA Project Representative Review
- DRDA Administrative Review
- DRDA Signing Officer Review
- Proposal Finalized
- DRDA Approved

Process DRDA Action

Use to: Pull a PAF/project out of the workflow (e.g., Awards In Progress) and display in the **DRDA Action** section of the **Actions in Progress** tab.

1. Click the **Process DRDA Action** activity to move a PAF into **DRDA Action in Progress** or **Post-Award DRDA Action Progress** state.
2. Click the **Complete DRDA Action** to return the PAF/project to the previous state.

The following activities are available in this state (in addition to the general activities that are available in all states e.g., Edit Staff Notes):

- Complete DRDA Action
- Release DRDA Hold

Process DRDA Action activity available in following States:

- Submitted to Sponsor
- Negotiation in Progress
- DRDA Processing
- DRDA PR Signoff
- DRDA Hold
- Active
- Post-Award DRDA Processing
- Post-Award DRDA PR Signoff
- Post-Award DRDA Hold

Project Team Requests DRDA Action

Current state: **Project Team Requests DRDA Action**

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

- If you do not agree with the request, use the **Decline Requested Action** activity to decline action & email UM PI & Primary Research Administrator.
- If no system action is needed, use the **No DRDA System Action Required** activity. This will not send an email.
- If you agree with the request, your next activity will depend on the request reason. See below.

Request Reasons:

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

DRDA Activity Response:

1. DRDA Make Changes & DRDA Submit Changes
2. Send to Project Team For Changes
3. DRDA Cancel PAF
4. Turn Down/Withdrawal

Project Closeout

Process Closeout

1. Click the **Process Closeout** activity.
2. Optional, enter **Comments**.
3. Click **OK**.
Upon completion of this activity, the project moves into the state of Closeout.

Process Closeout activity available in following States:

- Active
- Post-Award Project Team Requests Action

Close Project

1. Click the **Close Project** activity.
2. Enter **Date Closed**.
3. Optional, enter **Comments**.
4. Click **OK**.
Upon completion of this activity, the project moves into the state of Closed.