**ORSP Reference Card**

**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 Log In. 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.

**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.

**Find Projects**

**Find PAFs**

Use to search/view ALL PAFs in eResearch.

1. Click All PAFs from top blue header of the Home Workspace.
2. Select Filter by criteria. **Note:** ID = ORSP number, Name = PAF title.
3. Enter keyword.
4. 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.
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.
2. 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.
3. Optional, enter Comments. Comments are recorded in Recent Activity on the PAF Workspace. No email is generated.
4. If you are completing PR Approve, update ORSP Factors as needed. ORSP Factors are not seen with the SO Approve Activity.
5. Click OK. After PR Approval, the PAF State = ORSP Signing Officer Review. After SO Approval, PAF State = ORSP Approved.

**TIPS:**

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

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

**TIP:** If you need a Login ID, or have problems, click Need Help?

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

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

**Note:** When you enter more than one criteria, your search will need to match all entries.

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 recorded 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.

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 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 Respond to Requested Action

1. Click the Respond to Requested Action Activity.
2. 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 Actions 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, check the box to not send email, or check people to email.
7. Optional, click Add to select additional email recipients.
8. Click OK.

Submission to Sponsor

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

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.

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.

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. If already finalized the proposal, this Activity will return the proposal to a Not Finalized State.
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.
1. **Initiate Award Processing**

   Current State: **Submitted to Sponsor**
   1. Click the **Initiate Award Processing** Activity.
   2. Select Yes/No to Requires Principal Investigator Signature.
   3. Select Yes/No to Requires Institutional Signature.
   4. Click **OK**.
   
   Upon completion of this Activity, the PAF moves into the **Processing Award** State, and then an Award can be created.

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

   Current State: **Processing Award**
   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 **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.
   • 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. Click **Save** after entering data.
   3h. Click **Finish** to return to Award Information.
   3i. Click **Save**.

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

3. **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 SSC Processing PGN Request.
   - When Shared Services Center (SSC) completes their activities, the PAF will again be in the ORSP Processing State.

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

### 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 Award 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 Award 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.
3. Click OK.

### Release Award Information

**Use to send award notification/change email to Award 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 Sponsored Programs (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 Financial Processing State and allows Sponsored Programs to activate the PGN. Project will move to Active State after the PGN is activated by Sponsored Programs.

### 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.

### MANAGE HOLD

#### Manage 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.

**Note:** When the hold is removed from a project that has a bi-lateral signature type, an email is sent to Contracts Administration.
**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 modification, follow the Processing Award Changes instructions below.

   **If your change does not require a modification**, 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 Award Change 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 Sponsored Programs
- If a PI change is needed, see the ACR for PI directions.

**Award Change Request (ACR) 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.
2. 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.

3. 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).
   4. Click Save.
   5. Click OK.

4. 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, enter Sponsor Role.
   4. Click Save.
   5. Click OK.

**Follow the Processing Award Changes steps. The PR will not be able to sign the ACR 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.

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.

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 Edit (the initial entry 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
   a. Click Browse.
   b. Enter search criteria.
   c. Click Find.
   d. Select Sponsor.
   e. 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. Click OK.

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

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

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.

Agreement Acceptance (Formerly PAF-R)

Refer to the ORSP Agreement Acceptance step-by-step.

Manage Factors

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.

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.

Manage PGN

1. Click Manage Proposal Project/Grants from the Manage Data menu.
2. 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.
3. Click OK to close the Manage Project Grant Numbers view.

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 existing line*.
3. Find and add document.
4. Enter Title.
5. Select Type.
6. Click Attach.
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.

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.).
**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.
- To display commitment and notice information.

**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.

**Process ORSP Action**

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

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

The following Activities are available in this State (in addition to the Activities that are available in all States e.g., Edit Staff Notes):
- **Complete ORSP Action**
- **Release ORSP Hold**

**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 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.

**ORSP Cancel PAF activity available in following States:**
- ORSP Making Changes
- Project Team Submission to Sponsor
- Expedited Submission ORSP Review
- Expedited Submission
- ORSP Approved–Awaiting Final Proposal
- ORSP Review-Project Team Making changes
- Record Paper PAF
- Project Team Requests Action
- ORSP Project Representative Review
- ORSP Administrative Review
- ORSP Signing Officer Review
- Proposal Finalized
- ORSP Approved

**Project Closeout**

**Process Closeout**

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.

**Important!** Enter PGN.
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.

Note: The SUBK routes to OCA for review.