



eResearch Proposal Management (eRPM) Project Overview

April 17, 2009

- eResearch Proposal Management (eRPM)
- Phased implementation approach
- Input for eRPM design
- eRPM workflow
- eRPM implementation timeframe
- eRPM Training Opportunities
- Resources for more information

eResearch Proposal Management (eRPM) system is:

- New web-based system to accommodate internal routing, review, and approval of funding proposals to external sponsors.
- Federal Grants.gov proposals will be assembled, routed, and submitted directly in/from eRPM (for supported FOAs).
- Award information, including PANs and PACs is distributed and stored in the new system (effective 1/5/09).

eRPM data set

- PRISM data set retired all data converted & available in eRPM data set (effective 1/5/09)
- Contains new information entered in eRPM system
- Learn more:
<http://www.research.umich.edu/proposals/prism/prism.html>

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Testing		Pilot						Starting 3/30/09 All Campus Release				

★ Required
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- eRPM is now available for all campuses.
 - http://www.umich.edu/~eresinfo/erpm/docs/comms/09_0325_eRPMupdate.html
 - Check with your unit on when they will require you to use eRPM.
 - Your unit may or may not accept electronic submissions prior to this date.
 - Contact your Research Unit Liaison with questions
http://www.umich.edu/~eresinfo/erpm/uls/ruls_list.html
- Many units have set unit specific dates & communicated as appropriate.
 - Unit eRPM required dates:
 - http://www.umich.edu/~eresinfo/erpm/docs/eRPM_unitdates_web.pdf

- Simplification of the routing and approval process, e.g., based on information entered on PAF, the system figures out who needs to review the form
- Reviews and comments are all tracked together in one system
- Ability to track where a proposal package is in the review process
- Generate Grants.gov form set right in the system from information entered on PAF (if FOA is available/supported by Click Commerce – eRPM system vendor)
- Electronic system to system submission of supported Grants.gov forms.

- Reduce administrative burden on faculty and staff who prepare, review, and approve applications.
- Provide necessary proposal and award data for investigator, unit, and institutional management, serving as the single source for proposal and award data.
- Maintain a balance between minimum requirements needed to submit an application and desire for more institutional data.
- Maintain a balance between unit flexibility and institutional consistency with ease of use being the prevailing criterion.
- Maintain compatibility with existing institutional systems.
- Maintain maximum system transparency for all users.

- Phase 1 – Routing, approval, and submission of proposals to external sponsors, including Grants.gov
 - Electronic Proposal Approval Form (ePAF)
 - Grants.gov Proposal Preparation
 - Routing and Approval
 - Proposal Submission
 - Grants.gov
 - Non-Grants.gov External Sponsors
 - Award Notification
 - Data Warehouse
- Phase 2 – Internal system integration
 - Enhance functionality by integrating with existing systems, such as M-Pathways, eResearch Regulatory Management, PEERRS, and eSirius.
- Phase 3 – Routing, approval, and submission of proposals to internal funding sources
- Phase 4 – Budget development online tools

- Worked with variety of individuals from Ann Arbor, Flint & Dearborn campuses to develop & design eRPM
- Included:
 - Design Teams
 - Departmental Advisory Team
 - Research Unit Liaisons

Weekly design team meetings held to vet:

- **PAF/Proposal Tracking/Data Warehouse**
 - Judy Carrillo (Internal Medicine)
 - Linda Forsyth (College of Engineering)
 - Amy Rundquist (Statistics)
 - Kate Strzempek (DRDA)
 - Ann Verhey-Henke (School of Information)
- **Proposal Routing & Approval**
 - Pat Fink (ISR)
 - Heather Offhaus (Medical School)
 - Cathy Seay-Ostrowski (Transportation Research Institute)
 - Peggy Westrick (LSA)
- **Proposal Preparation**
 - Yvonne Barber (Epidemiology)
 - Bob Beattie (DRDA)
 - Kathy Hoskins (Mechanical Engineering)
 - Robin Losee (Medical School)
 - Carolyn Pappas (ISR)
 - Colleen Vogler (Molecular, Cellular, and Developmental Biology)

- Goal: gather feedback regarding:
 - PAF/Proposal Tracking
 - Proposal Routing & Approval
 - Proposal Preparation

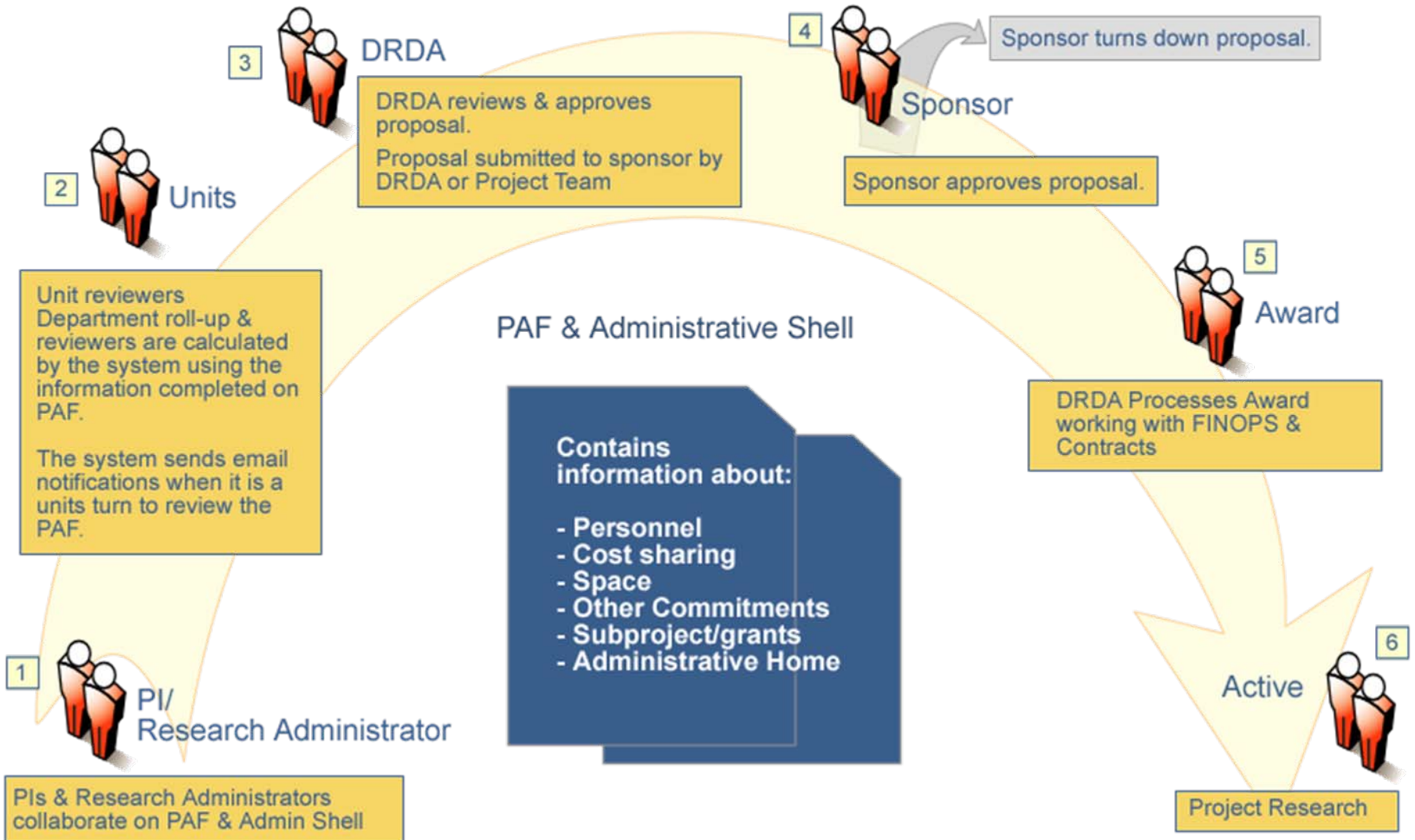
Participation from:

- Eve Bernos (Nursing)
- Lori Bowden (Biostatistics)
- Drew Buchanan (UM - Dearborn)
- Kathy Devereux (Psychology)
- Diane Fiolek (Dermatology)
- Doreen Graden (Cariology)
- Michelle Hall (Social Work)
- Beth Lawson (Electrical Engineering and Computer Science)
- Lori Maddix (Public Policy)
- Mary Martinowicz (School of Natural Resource and Environment)
- Pennie Rutan (Pharmacy)
- Sonia Schmerl (Comparative Literature)
- Elizabeth Tropiano (Kinesiology)
- Bonni Viets (Materials Science and Engineering)
- Tina Wells (Physics)

- Research Unit Liaison program for MAIS-supported research systems developed in conjunction with the development of the eResearch Proposal Management System (eRPM).
- Some of the Research Unit Liaison responsibilities to help with the implementation of eRPM include:
 - Keep their unit informed.
 - Provide feedback, special needs, and concerns from their units to the eRPM project team.
 - Maintain eRPM system routing & approval information for their unit.
 - Form and work with a Transition Team for their schools, colleges, or units.
 - Participate in an eRPM readiness assessment.
 - Identify staff members who will need training.
- For list see:
http://www.umich.edu/~eresinfo/uls/erpm/ruls_list.htm

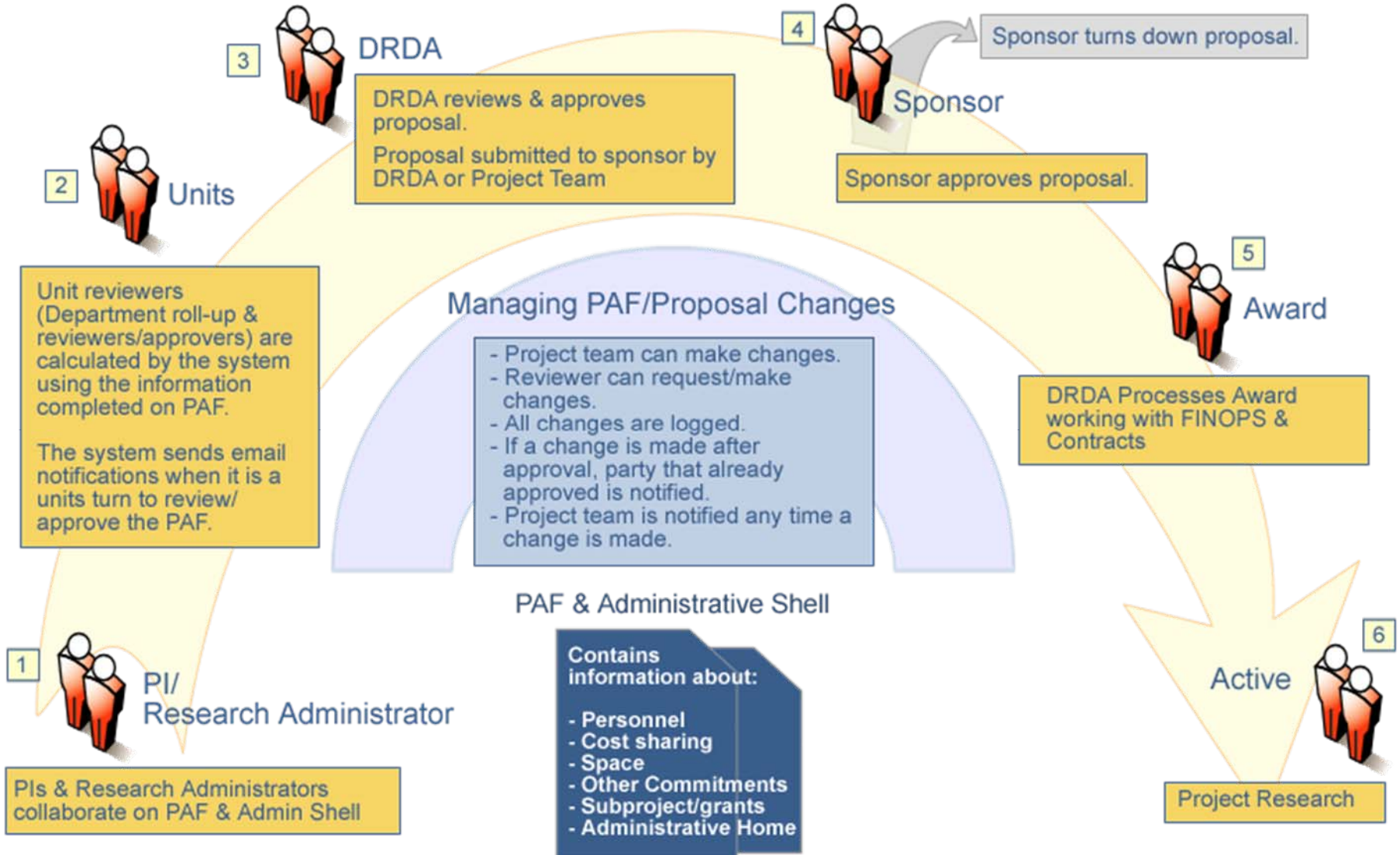
eResearchM eRPM Workflow

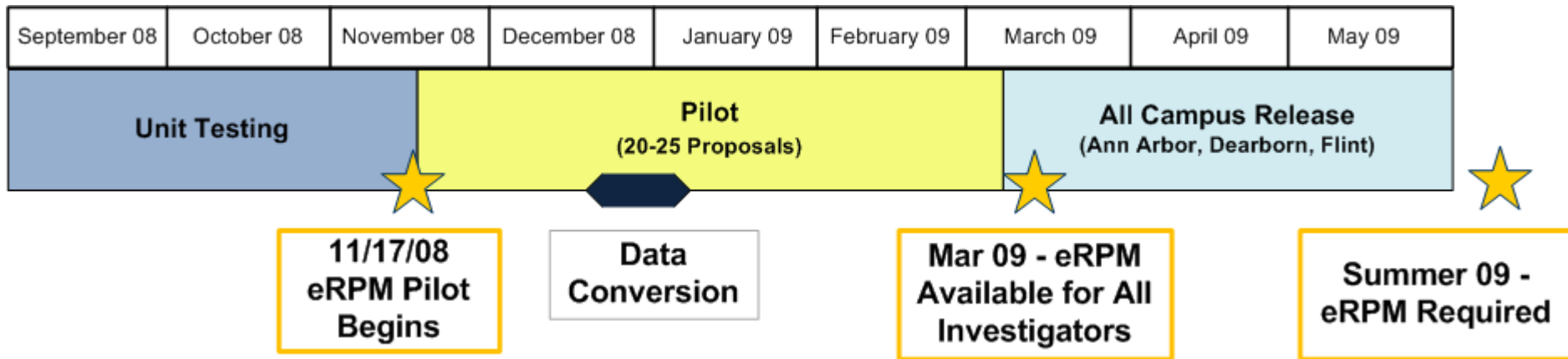
eRPM system workflow starts at proposal creation and continues through active project.



eResearchM eRPM Workflow with Changes

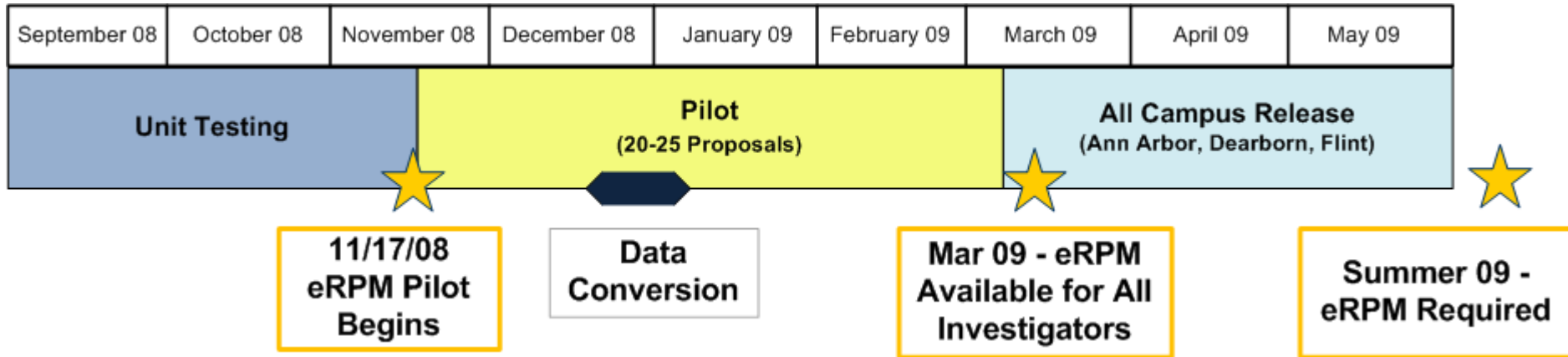
eRPM system workflow accommodates making & managing changes.





- **Proposals March 30 2009 - Summer 2009**

- All campuses will continue to use both eRPM & paper PAFs until Summer 2009.
- Starting March 30, you will begin to receive items for review via eRPM from other units, if you have been designated as a 'Reviewer' or a 'Reviewer who can Sign (i.e., Approver)'.
- During the transition period, the rule for electronic versus paper review is as follows:
 - If the administrative home of a proposal has decided to use eRPM, you must complete your review in eRPM.
 - If the administrative home of a proposal has created a paper PAF, the review will still be completed on paper.



- Summer 2009
 - Paper ePAF retired. All PAFs must be created and routed using eRPM.
- November 17, 2008 – March 2009
 - Piloted with a small group of volunteers that represented a variety of project types from several school/colleges/units.
- January 5, 2009:
 - DRDA started entering all PAFs into eRPM system
 - All award notifications sent from eRPM system
learn more... <http://www.umich.edu/~eresinfo/erpm/docs/PANsPACs.html>
 - PRISM data set retired and replaced with eRPM data set
learn more... <http://www.research.umich.edu/proposals/prism/prism.html>
 - PRISM on the web still available - renamed Sponsored Projects on the Web
learn more... <http://www.research.umich.edu/proposals/prism/prism.html>

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- During the eRPM Pilot (from 11/17/08 – 3/29/09):
 - 39 pilot proposals created in eRPM
 - 37 submissions
 - 14 Grants.gov system to system submissions

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- From pilot feedback, enhancements/changes made to eRPM in the following areas:
 - Proposal Preparation
 - Unit Review
 - New finalize proposal process
 - Grants.gov
 - Award Notifications
 - Training documents/classes

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- Received positive feedback about using eRPM.
- Pilot participants found training helpful.
- For summary of pilot observations & improvements, go to: http://www.umich.edu/~eresinfo/erpm/docs/eRPM_Conf_Call_09_0330.pdf
- For those who attended training during the pilot, see list of enhancements/improvements made. http://www.umich.edu/~eresinfo/erpm/rnotes/releasenote_v1.2.02.html



- Onscreen Help
 - Brief directions on how to complete question with link to more information.
- Classroom sessions
 - Comprehensively cover PAF creation, the review process, the review routing table, making changes when a PAF is out for review, managing proposal data during unit review, how to review/approve, and PAN/PAC notifications.
- PAF online course
 - Just covers the creation of the PAF. Does not cover the review process, routing, or changes to the PAF.

- Online training materials
- Job Aids - print and keep by your side when using the system for quick tips and reminders.
 - PI Sign PAF/Conflict of Interest
 - http://www.umich.edu/~eresinfo/erpm/docs/ReferenceCard_PISignPAF.pdf
 - PAF Creation/Completion
 - http://www.umich.edu/~eresinfo/erpm/docs/Reference_Card_PropPrep_to_Route.pdf
 - Proposal Review Basics
 - http://www.umich.edu/~eresinfo/erpm/docs/Reference%20Card_REV.pdf

- Questions about when to use eRPM or Unit Business Policy/Requirements
Research Unit Liaison
- Technical support (e.g., navigation, connectivity, and system errors)
MAIS Help Desk
Phone: 734-936-7000, option 6
E-mail: maishelpdesk@umich.edu
- Submission or sponsor specific questions
DRDA Project Representatives
Phone: (734) 764-5500
Fax: (734) 763-4053, 764-8510

Go to: <http://eresearch.umich.edu>

The screenshot shows the eResearch M website. At the top left is the logo 'eResearch M'. To the right is a search bar with the text 'Search'. Below the logo, there are two main navigation buttons: 'Regulatory Management (IRB, IBC, etc.) LOGIN ►' and 'Proposal Management LOGIN ►'. The 'Proposal Management' button is highlighted with a red arrow pointing from a callout box on the left. The main content area has a 'Welcome to eResearch' heading. Below it are two links: 'Regulatory Management (IRB, IBC, etc.)' and 'Proposal Management'. The 'Regulatory Management' link is highlighted with a red arrow pointing from a callout box on the right. Below these links are two paragraphs of text describing the systems. The first paragraph describes the Regulatory Management system, and the second describes the Proposal Management system. To the right of the main content is a 'News' section with a heading 'eResearch Regulatory Management' and a paragraph of text. At the bottom left, there is a small image of a man speaking at a podium. A callout box on the left contains the text 'Proposal Management System login' with a red arrow pointing to the 'Proposal Management LOGIN ►' button. A callout box on the right contains the text 'You will find:' followed by a list of items: Training Materials, Sandbox (Training Environment), FAQs, Getting Started, Background Information, System login, and Unit Liaison Information. A red arrow points from this list to the 'Regulatory Management (IRB, IBC, etc.)' link.

eResearch **M**

Regulatory Management (IRB, IBC, etc.) LOGIN ►

Proposal Management LOGIN ►

Welcome to eResearch

[Regulatory Management \(IRB, IBC, etc.\)](#)

eResearch Regulatory Management is the web-based system that centralizes the review and approval process for Human Subjects Research Applications, IBC Recombinant DNA Registrations. To begin a new IRB application or IBC rDNA registration, [login](#) to eResearch Regulatory Management.

[Regulatory Management \(IRB, IBC, etc.\)](#)

Proposal Management

eResearch Proposal Management (eRPM) is the new Web-based system to accommodate the electronic routing, approval, and submission of funding proposals to external sponsors, including Grants.gov. To begin a new proposal, [login](#) to eResearch Proposal Management.

Available to all campuses **3/30/09**.

News

eResearch Regulatory Management

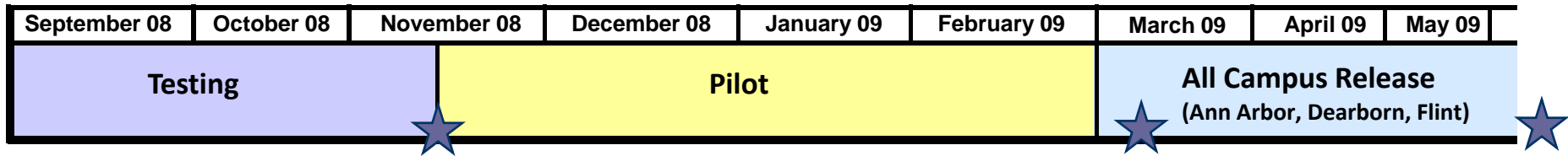
Office for Human Research Protections (OHRP) & U-M are co-hosting a Research Community Forum, "Reducing Regulatory Burden: Real Strategies for Real Change," on 5/14/09. [Details...](#)

System changes implemented

You will find:

- Training Materials
- Sandbox (Training Environment)
- FAQs
- Getting Started
- Background Information
- System login
- Unit Liaison Information

Proposal Management System login



- eRPM updates will be sent to:
 - eRPM-info user group
 - Formerly grants gov info
- If you are not part of eRPM-info, you can join.
 - Go to: <http://directory.umich.edu/>
 - Search for: eRPM-info
 - Bind
 - Join