PAF Changes Mockup

An outline and mockup of the PAF changes to support the new Proposal Submission Deadline Policy coming with the eResearch Proposal Management (eRPM) 5.4 update on July 22, 2019.

- **Section 1 - General Information**
  - New question to identify whether you are routing a proposal for external funding, a funding agreement, or both
  - Renumber some questions

- **Section 2 - People**
  - Project Representative question from Section 5 moving here
  - Renumber some questions

- **Section 3 - Budget**
  - No changes

- **Section 4 - Space**
  - No changes

- **Section 5 - Research Activity**
  - Name changed from Supporting Information
  - Removed Routing Instructions page

- **Section 6 - Submission Information**
  - Name changed from Proposal Documents
  - New Submission Details page with questions for Deadline Dates and Submission Methods
  - Capture of Submission Deadline
  - Calculation of ORSP Deadlines for Full and Limited Review
  - New options on Proposal Submission Methods
  - New option to indicate Target Date
  - New options to provide instructions for ORSP
1.2 The purpose for routing this PAF is to (select one of the following): *

- Process the submission of a proposal.
- Request the review and/or negotiation of a contract/funding agreement.
- Both of the above.

1.3 Is this a Grants.gov funding opportunity that is available for electronic submission? *

- Yes
- No
- Clear

1.4 Is this a pre-proposal? *

- Yes
- No
- Clear

1.5 If Renewal/Continuation or Supplemental Request, enter an Award ID

Upon selection of an Award ID, the related project grant will be displayed.

If this PAF is related to a previously awarded project, enter the Award ID number. If you don’t know the Award ID use the PAF Query to find the correct Award ID. After selecting the Award ID, the related project grant number(s) will be displayed.

1.2 Long Title (Displays in Reporting)

As needed, capture the complete title. If left blank, it defaults to the Project Title the first time this page is saved.

1.3 Notes to identify whether you are routing a proposal for external funding, a funding agreement, or both.
The Federal Grant Information page displays if question 1.3 (Grants.gov opportunity available for electronic submission) is answered “Yes”. It has been renumbered.
The Deadlines section has been moved to Section 6 and questions have been renumbered.

1. General Information

Sponsor Information

1.7 Sponsors *

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<tr>
<th>Add</th>
<th>Delete</th>
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<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Type</th>
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<tbody>
<tr>
<td>NIH</td>
<td>Direct</td>
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1.7.1 Sponsor Guidelines

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
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<tbody>
<tr>
<td>Sponsor Guidelines</td>
<td>Attach</td>
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1.7.2 Sponsor Guideline URL

Type the relevant URL (web page address).

Tip: For future reference, upload above the sponsor specific instructions in case this URL changes or is inactivated.

1.7.3 Sponsor Contact Information

Click Add to enter sponsor contact information.

Requirements for sponsor contact information vary based on the method of proposal submission (selected in question 6.2.2).

- Submissions to Grants.gov, Other Online System - All contact information optional
- Email, Commercial Courier, US Mail - Name, email, address (PO. Box number cannot be used for Commercial Courier submissions), and telephone number required
- Fax - Name, email, and fax required
- Other, No Proposal Submission Required - Name and email required

Click here for more information.
“Sponsor Solicitation Number” and “CFDA Number” questions will only display for non-Grants.gov PAFs and will remain optional.

“FOA Information” block will only display for Grants.gov PAFs.
Enter the appropriate class code for this proposal/contract consistent with the university's defined class codes.

May be required by some units.

Include if available because this text is searchable, expanding searches beyond project title in the eRPM data set (data warehouse).

Including this in the PAF does not transfer or upload this information to the proposal. If required by sponsor, you still need to send or upload to sponsor.

Enter 3 Key Terms.

Key terms help expand searches beyond project title in the eRPM data set (data warehouse). E.g., you want to find all cow related projects. It helps if project key terms include cow, bovine, heifer.

Optional - May be required by some units.

Describe briefly the goals of the project.

Generally required when a potential sponsor requests complete lists of other active awards and pending proposals. May be used to build other support.
2. People

Project Administration

2.7 Project Administrative Home: *

HELP
Defaults to the selected appointment for the UM Principal Investigator.
Can be changed if desired using the Select button.

2.8 Primary Administrative Contact: *

- Name Here
- Name Here
- Clear

HELP
Select one administrative contact.
The Primary Administrative Contact is:
- always able to edit the PAF (when it is an editable state)
- route the PAF for approval.

2.9 Primary Post-Award Contact: *

- Name Here
- Name Here
- Clear

HELP
Select one post-award administrative contact.
This person will be the contact for the project if it is funded.

2.10 Project Representative *

"Project Representative" question relocated to 2.10.

HELP
If you do not know your Project Representative, see staff sponsor assignments or call ORSP information 734-764-5500.
6. Submission Information

Submission Details

6.1 Deadline Dates

6.1.1 Submission Deadline*

Enter the “Submission Deadline” or select “No Sponsor Deadline.”

The date that is entered here will be used to calculate the date by which the proposal must be finalized under U-M’s internal deadline policy and the level of service that will be provided by ORSP.

Submission Deadline

or No Sponsor Deadline

6.1.2 The sponsor requires that the proposal be submitted earlier than 5pm ET on the due date:

Select the time the proposal must be sent to the direct sponsor:

Time selection only displays if the box for 6.1.2 is checked.

6.1.3 Target Date

Explanation:* 

“Explanation” only displays if the Target Date is entered.

6.1.4 Prime Sponsor Deadline - if applicable

Enter prime sponsor deadline, if applicable.

6.1.5 School/College Deadline

Refer to your School/College for deadline policy information.

6.1.6 Dept/Unit Deadline

Refer to your Dept/Unit for deadline policy information.
6.2 Submission Methods

6.2.1 Will ORSP submit the proposal or part of the proposal to the sponsor?*
- [ ] Yes
- [ ] No

6.2.2 Proposal Submission Methods*
How will the proposal document be submitted from U-M to the Sponsor? (select all that apply)
- [ ] eResearch Submission to Grants.gov (displays Grants.gov link on PAF workspace)
- [ ] Other Online System (e.g. Fastlane, Grants.gov Workspace, proposal-CENTRAL)
- [ ] Email
- [ ] Commercial Courier (FedEx, UPS, etc.)
- [ ] US Mail
- [ ] Fax
- [ ] Routing Previously Submitted Proposal - No Proposal Submission Required
- [ ] Routing Proposal and Award Together - No Proposal Submission Required
- [ ] Other

Other submission method:
"Other submission method" only displays if "Other" is checked.

Enter proposal submission and/or other instructions for ORSP:

One or both text boxes to enter instructions display in 6.2.3 based on response to question 1.2 (Is this PAF for a proposal, funding agreement for review, or both?).

6.2.3 Proposal Submission, Contract/Funding Agreement Review and/or Negotiation, or Other Instructions for ORSP*

Enter contract/funding agreement review and/or negotiation and/or other instructions for ORSP:

Enter any information ORSP may need to process this PAF, including:
1. Detailed instructions to ORSP for submission of the proposal, part(s) of the proposal, and/or tangible materials (e.g., proposal hardcopies, flash drives).
2. Delivery/routing contact & contact information (address, fax number, email, etc.).
3. Whether ORSP Signature is required and on which documents/pages
4. Whether an institutional (cover) letter is required
Specify whenever these notes are award related and not related to final proposal submission to sponsor. For more information, see ORSP’s policies on submission of hard copies, electronic media, and other tangible materials.

When routing a contract/funding agreement for review and/or negotiation, please provide the following, as applicable:
1. Whether ORSP should provide the agreement. If an agreement is attached, please indicate who provided it.
2. Whether there are any requested contract terms (e.g. fixed fee or cost reimbursement).
3. Whether the sponsor has already agreed to fund this project or agreed to any associated terms (e.g., a payment schedule).
4. Whether this project will involve the exchange of confidential information.
5. Whether U-M will be disclosing, or receiving from the sponsor, any confidential information. If yes, provide a non-confidential description of the information to be disclosed and its intended use (e.g., a research topic sentence).
6. Whether it is likely that intellectual property will be created by U-M during this project.
7. Whether publication is anticipated as a result of this funding.

On “Save” or “Continue”, deadline dates will be calculated based on entries in 6.1.1.
6. Submission Information

Please note that effective January 6, 2020 the University of Michigan is implementing a new external proposal submission deadline policy. Under the new policy, one of the following levels of review will be provided, depending on when the final version of the proposal and its accompanying finalized PAF are received in ORSP:

- A full review if received at least 32 business hours prior to the Submission Deadline entered on the PAF.
- A limited review if received at least 15 business hours prior to the Submission Deadline entered on the PAF.

A final proposal and PAF that arrives in ORSP with less than 15 business hours lead time will be considered "at risk." ORSP will endeavor to submit the proposal if there is sufficient time and staff availability, but not at the expense of timely proposals and not without first conducting a limited review. For these reasons, "at risk" proposals may or may not be submitted in time.

For more information, please visit ORSP's Proposal Submission Deadline Policy webpage. If you have any questions regarding your school/college/institute's implementation of the new policy, please direct them to your local research administration leaders.

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<th>Submission Deadlines (read-only)</th>
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<tbody>
<tr>
<td>Prime Sponsor Deadline:</td>
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<tr>
<td>Submission Deadline:</td>
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<tr>
<td><strong>ORSP Deadlines</strong></td>
</tr>
<tr>
<td>Full Review - received by ORSP before 5pm on:</td>
</tr>
<tr>
<td>Limited Review - received by ORSP before 9am on:</td>
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<tr>
<td>School/College Deadline:</td>
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<tr>
<td>Dept/Unit Deadline:</td>
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<td>Target Date:</td>
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Proposal Documents

6.3 Final Documents for Submission:

**Warning: Do not upload any export controlled information or data to this PAF.**

Please do not upload Word, Excel or multiple documents unless specifically required by the sponsor or instructed by your ORSP Project Representative.

- If you are submitting via Grants.gov Workspace, attach one PDF file of the final proposal.
- If you are submitting to Grants.gov via eResearch, then you do not need to upload any documents here.
- For other submission types, attach as one PDF file all required documents to be submitted, or that have been submitted, to the sponsor (e.g., statement of work, budget, etc.)

**Note:** If you are routing a contract to be negotiated, attach an editable version (e.g., a Word document) of the contract and supporting documents in Section 6.4.
“Final proposal document(s)” are only the documents that will be or have been submitted to the sponsor and should be uploaded to Section 6.3.

If you have any other documents (e.g., sponsor instructions, internal documents or draft agreement for review), upload them in Section 6.4.

“Final” means ready for ORSP submission at any time (i.e., ORSP could submit to sponsor 2 minutes or 2+ days after it’s routed to ORSP). ORSP may be required to provide additional documentation or signatures, but everything else is in its final form. If ORSP submits, ORSP is responsible for uploading the final proposal as submitted to the sponsor of the PAF.

If you answer “Yes,” upload your document for submission as a PDF file in Section 6.3.

If you answer “No,” note that:
- You may still be able to route your PAF for approval. Check with those in Unit Review on whether they will accept an unfinalized proposal for review.
- You can finalize the proposal later via the Finalize for Submission to Sponsor activity on the main PAF workspace once your proposal is finished and ready for submission.
- You must finalize your proposal to enable ORSP’s review and submission of the proposal.

6.5.1 If applicable, check here to confirm that ORSP has been granted access to the proposal in the sponsor’s electronic proposal submission system (e.g., NSF FastLane/Research.gov, NASA NSPIRES, AHA Grants@Heart).*

6.5.1 only displays if 6.5 is “Yes” AND 6.2.1 ("Will ORSP Submit") is “Yes” AND 6.2.2 is “Other Online System".