Overview

Topics we’ll touch on today

- ERA replaces Coeus/RPSP for proposals
- How to budget un-named personnel
- GCO assignments and communication
- Subaward budget imports
- Approvals process (workflows)
- Support resources for RA’s using ERA
- Proposals for incoming faculty
- Adding new sponsors
- ERA process for proposal-specific COI certifications
- When can we make changes to the proposal and budget?
- Native American Approval Process
All Proposals in ERA

• ERA will replace Coeus and Research Proposal SharePoint for the purposes of proposals.
Budgeting Un-named Personnel

- I need to budget for a student, a technician, or another position for which a specific person has not been identified—how can I do this in ERA?
What will be the process for having a Grant & Contract Officer (GCO) from the Proposal & Negotiation Team (PNT) assigned to my proposals?

How will I interact with my assigned GCO throughout development of proposals in ERA?
Current Process for Requesting a GCO Assignment
ERA Process for Obtaining GCO Assignment

• Required Information/Documentation
  – PI Name
  – Sponsor
  – Due date
  – Funding Opportunity Announcement (FOA) #, if applicable
  – Funding Announcement (FA) uploaded within ERA, if available
## Current Process for Communicating with GCO

### Action Items

<table>
<thead>
<tr>
<th>Title</th>
<th>Assigned To</th>
<th>Due Date</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>GCO Assigned – Avery Wright 7-7983</td>
<td>Avery Wright</td>
<td>12/27/2013</td>
<td></td>
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<tr>
<td>Cover Sheet Instructions, Question</td>
<td>Avery Wright</td>
<td>12/27/2013</td>
<td></td>
</tr>
<tr>
<td>SUBMITTED</td>
<td>Avery Wright</td>
<td>1/7/2014</td>
<td></td>
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<tr>
<td>RESUBMITTED</td>
<td>Jessica Robins</td>
<td>1/13/2014</td>
<td></td>
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<tr>
<td>Avery oooh morning 01/14/14</td>
<td>Jessica Robins</td>
<td>1/13/2014</td>
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### Notes
- **GCO Assigned – Avery Wright 7-7983**
  - Avery Wright
  - Due Date: 12/27/2013

- **Cover Sheet Instructions, Question**
  - Avery Wright
  - Due Date: 12/27/2013

- **SUBMITTED**
  - Avery Wright
  - Due Date: 1/7/2014

- **RESUBMITTED**
  - Jessica Robins
  - Due Date: 1/13/2014

- **Avery oooh morning 01/14/14**
  - Jessica Robins
  - Due Date: 1/13/2014

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**[Add new item]**
### ERA Process for Communicating with GCO

#### My Current Actions
- Submit For Department Review
- Generate Department Approvers
- Cancel Proposal
- Create COI Certifications
- Notify PNT
- Bundle Sponsor PDFs (non S2S)
- Add Miscellaneous Attachments
- Assign RA Ownership

#### History
<table>
<thead>
<tr>
<th>Activity</th>
<th>Author</th>
<th>Activity Date</th>
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<tbody>
<tr>
<td>RA has been emailed</td>
<td>Bohall, Hayley Jean</td>
<td>1/27/2014 8:25 AM PST</td>
</tr>
<tr>
<td>Hi Jessica: This project is Organized Research because the primary purpose is to develop a process. Please let me know if you have any questions. Thanks, Hayley</td>
<td>Bohall, Hayley Jean</td>
<td>1/27/2014 8:24 AM PST</td>
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<td>PNT has been notified</td>
<td>Robins, Jessica Poole</td>
<td>1/27/2014 8:24 AM PST</td>
</tr>
<tr>
<td>Hi Hayley, Please review the Project Summary to confirm the appropriate Activity Type for this project. Thanks for your help, Jessica</td>
<td>Robins, Jessica Poole</td>
<td>1/27/2014 8:24 AM PST</td>
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Subaward R&R Budget Form Import

• Use Forms B Subaward R&R Budget
Workflows

- How will I route for approvals in ERA?
Support & Resources

• Three ways to get the help you need quickly
  – Click to connect with an expert
  – Call 480-965-9065
  – Email ERA@asu.edu

• Resources:
  – Updated instructions throughout researchadmin.asu.edu
  – Open Labs

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New Faculty

• For incoming faculty, the RA will need to contact erahelp@asu.edu and request this individual be manually added.

• The individual must be a prehire in the peoplesoft database and a courtesy affiliate.
Adding Sponsors

- You can add a sponsor that isn’t already in the system.
- Designate the sponsor as TBD Federal, TBD Non Profit or TBD Industry depending on your sponsor.
- Add any information you can to the text field.
- Use the email template “New Sponsor Request” to submit the request to Analytics.

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COI

• Who – The PI and any ASU employee listed as key or other significant contributor on the proposal.
  – If an individual is only receiving recognition they will not need to complete an FCOI request.
COI

• How – The RA will run the activity “Create COI Certifications”. The RA must run this activity prior to running the activity “Submit for Department Review”.

• Individuals required to complete an FCOI will do so in the COI module.
Note: If an individual is added after the COI process has already begun, the activity will need to be re-run to include this individual.
Editing a Proposal

• When can I make changes to the proposal and budget?
• You can make changes to the proposal when it is in:
  – Draft
  – Department Review Pending Response from RA
  – PNT Review
  – PNT Review Pending Changes from RA

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Editing a Proposal

- You **cannot** make changes when it is in:
  - Department Review
  - PNT Ready to Submit
  - Submitted Pending Sponsor Acceptance

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Editing a Budget

• You can make changes to the budget in all states until the proposal has been awarded or denied.
<table>
<thead>
<tr>
<th></th>
<th>Funding Proposal</th>
<th>Budget</th>
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<tbody>
<tr>
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<td>Department Review</td>
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<tr>
<td>Department Review Pending Response from RA</td>
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<tr>
<td>PNT Ready to Submit</td>
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<td>✓</td>
</tr>
<tr>
<td>Submitted Pending Sponsor Acceptance</td>
<td>✗</td>
<td>✓</td>
</tr>
</tbody>
</table>
Native American Approval Process

• During the proposal process the RA will upload the approval letter to Q3 on SmartForm 2.1 Special Reviews. Afterwards the RA will use the Notify ORIA activity alerting them to the approval letter.

• What has changed?
Advancing Research, Entrepreneurship and Economic Development

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