

NCURA PRA-III Workshop-WS4: Grants.gov Boot Camp

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Georgia Institute of Technology

How to prepare & submit PureEdge and Adobe Grants.gov applications.

Download the latest version (8/9/08) of this PowerPoint presentation

<http://uidspfflood.com/prs-3-gg-bootcamp.ppt>

Download the latest version (8/9/08) of the complete PDF handout

<http://uidspfflood.com/prs-3-gg-bootcamp.pdf>

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Feel free to use, modify, post, and present these slides, and the information contained in them, for the benefit of interested individuals at your institution.

This PowerPoint presentation will be available at the following URL until January 1, 2009:

<http://uidspfflood.com/prs-3-gg-bootcamp.ppt>

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Who We Are

John Massa

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NIH Transitions to Electronic Grant Submission via Grants.Gov

<http://research.uiowa.edu/dsp/main/index.php?get=electronicsubmissionnihgrants.html>

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Grants.Gov at Georgia Tech

<http://www.osp.gatech.edu/grants.shtml>

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Grants.gov Boot Camp

Basic training:

- Setting up your institution for Grants.gov
- How to prepare, submit and troubleshoot Grants.gov applications

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NIH R01: PureEdge vs. Adobe

Let's sneak a brief look at each type of form, before getting lost in all of the details:

NIH R01 – PureEdge Form

<http://apply.grants.gov/apply/UpdateOffer?id=6298>

NIH R01 – Adobe Form

<http://apply07.grants.gov/apply/UpdateOffer?id=7706>

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What is Grants.gov?

- System created by a Federal mandate to make applying for federal grants more **streamlined** and **consistent**
- Used by 26 Federal granting agencies
- Web-based mechanisms for finding, and applying for, federal funding

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Register your Institution

- Your Institution must be registered with **Grants.gov** and the **Central Contractor Registration (CCR)**
http://www.grants.gov/applicants/get_registered.jsp
If your institution receives Federal grants, you may already be registered in CCR, which facilitates electronic funds transfer
- NIH submissions: Your Institution must be registered with **NIH eRA Commons**
<https://commons.era.nih.gov/commons/>
Other Federal agencies may have their own electronic systems in which you will need to register, e.g., HRSA electronic Handbooks

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Register Your Staff

Register appropriate staff in Grants.gov and agency-specific systems to submit proposals on behalf of the institution:

- Grants.gov: Authorized Organizational Official (AOR) [E-Biz POC Login](#)
- **NIH eRA Commons**: Signing Official (SO)
- HRSA (Health Resources & Services Administration): "[Electronic Handbooks](#)" = a mess

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PI's NIH eRA Commons Account

To submit an NIH grant application via Grants.gov, the Principal Investigator must have an

NIH eRA Commons Account, with:

- a "**PI**" role designation, and
- an "**ACTIVE**" account status, and
- an **AFFILIATION** with the applicant institution

If the PI has an NIH Commons account as an NIH **reviewer** only, or if the account associated only with a **former institution**, the account must be updated before an NIH application from your institution can be submitted to the NIH eRA Commons via Grants.gov .

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Grants.gov: Required Software

Download the required software:

PureEdge Viewer (for PureEdge Forms)

http://grantsgov.tmp.com/static2007/help/download_software.jsp#pureedge

Adobe Reader (for Adobe Forms)

Always use the latest version of the Adobe Reader that Grants.gov specifies (currently 8.1.1, 8.1.2, or 9.0)

http://grantsgov.tmp.com/static2007/help/download_software.jsp#adobe811

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Grants.gov: Required Software

You will also need one of the following to **create PDF file attachments** (required by NIH) from MS Word or other text editors:

Adobe Acrobat (8.1.2 or higher)

<http://www.adobe.com/products/acrobat/matrix.html>

Cute PDF Pro (Similar to Adobe Acrobat)

<http://www.cutepdf.com/Products/CutePDF/Pro.asp>

CutePDF Writer(free)

<http://www.cutepdf.com/Products/CutePDF/writer.asp>

Other PDF Conversion Programs

http://grants.gov/help/download_software.jsp#pdf_conversion_programs

The future of PureEdge Forms

- Pure Edge + Adobe → 100% Adobe
- Grants.gov has begun a "phased deployment" to 100% convert to Adobe forms by July 1, 2009.
- **NIH** will begin to change from PureEdge to Adobe forms in **December, 2008**, assuming that a late summer, 2008, pilot goes well:
<http://grants1.nih.gov/grants/guide/notice-files/not-od-08-073.html>

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Find Funding Opportunities

- Even “Investigator-Initiated” Grants.gov applications require a specific Grants.gov application package.
- The Grants.gov search page looks for funding opportunities available from the 26 participating federal granting agencies
- Grants.gov: FIND GRANT OPPORTUNITIES
http://www.grants.gov/applicants/find_grant_opportunities.jsp

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Find (Grants.gov) Funding Opportunities

Some examples from different AGENCY web pages:

Health Resources and Services Administration (HRSA)
<http://www.hrsa.gov/grants/default.htm>

National Science Foundation (NSF)
<http://www.nsf.gov/funding/>

National Institutes of Health (NIH)

NIH Grant Proposal Guide
<http://grants2.nih.gov/grants/guide/index.html>

NIH “Parent” Announcements
http://grants2.nih.gov/grants/guide/parent_announcements.htm

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NIH: Funding Opportunities

- Locate a “Funding Opportunity Announcement” (FOA) for EACH electronic NIH application
- Each NIH mechanism (R01, R03, R21, etc.) has its own “Parent” announcement and application package for **Investigator-Initiated** awards:
http://grants2.nih.gov/grants/guide/parent_announcements.htm
- Specific NIH program announcements (PAs & RFAs) have their own specific application packages. For example:
<http://grants.nih.gov/grants/guide/pa-files/PA-08-014.html>

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NIH: Finding Funding Opportunities

- Find out what NIH mechanisms have transitioned to electronic submission and when others will follow:
http://era.nih.gov/ElectronicReceipt/strategy_timeline.htm
- Search for NIH grant opportunities via the NIH Guide for Grants and Contracts
<http://grants.nih.gov/grants/guide/index.html>

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The NIH Grant Application Package

- From the NIH “program announcement,” click the “Apply for Grant Electronically” button to obtain the Grant Application Package for that announcement.
For example (Parent R01):
<http://grants.nih.gov/grants/guide/pa-files/PA-07-070.html>
- You must download the specific Application Package for each Funding Opportunity Announcement (FOA)

For example, the Grant Application Package downloaded from an **R03** FOA may **not** be used for an **R01** application
Always check for an updated version, i.e., do not use an older R21 Grant Application Package that was downloaded for a prior deadline without checking to see if there has been an update.

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Finding the application package

- **NIH Resubmission** of an application submitted in response to a specific Program Announcement (PA) - **make sure the PA is still active!** When in doubt, contact the Program Officer.
- **NIH Resubmission:** Download the Grant Application Package from the current PA or, if that PA has expired, download the Grant Application Package from the Parent announcement for that mechanism (R01, R21, etc.) and refer to the prior PA in a cover letter.

DEFINITION:
NIH Resubmission = an amended or revised application.

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PureEdge & Adobe Files: File Sharing

PureEdge or Adobe Grants.gov Packages are similar to MS Word documents:

- The Grant Application Package file must be saved on a local hard drive, server, etc - it is NOT an "on-line" web-based document;
- Only one person at a time can work on the document
- Adding information or editing must be done sequentially in the same document

PIs and their administrators need to discuss how the Grant Application Package will be shared during completion and review, and how tasks will be assigned.

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Buttons: Save, Print, Cancel, Check Package for Errors

Opportunity Title: Research Project Grant (Parent R01)
Offering Agency: National Institutes of Health
CFDA Number:
CFDA Description:
Opportunity Number: PA07 070
Competition ID: VERSION 2A FORMS
Opportunity Open Date: 01/05/2007
Opportunity Close Date: 01/03/2010
Agency Contact: Grants Info
TTY 301 451 8000
E-mail: GrantsInfo@nih.gov

This electronic grants be used to apply for if opportunity reference
If the Federal funding opportunity for which this application packs "Cancel" button at the then need to locate if opportunity, download apply.

This opportunity is only open to organizations, applicants who are submitting grant applications on behalf of a comp government, academia, or other type of organization.

* Application Filing Name: [Redacted]
Mandatory Documents: SF424 (R&R) Research & Related Senior/Key Person Profile (Expanded) Research & Related Other Project Information Research & Related Project/Performance Site Location(s)
Mandatory Completed Documents for Submission List

NIH R01 – PureEdge Form

Saving and sharing the file:

Save the downloaded Grant Application Package:

- Save the Application Package on your local hard drive, server, USB drive, etc.
- Data entry error messages appear when you first save the package because no data have been entered yet. Error messages will be seen each time you save until all required data are entered.
- "Re-save" the file with a different file name (-01, -02, etc.) as you add information to the form
- When you SAVE, note the file name and folder location to avoid creating multiple versions in various places.

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Saving and sharing the file:

Save the downloaded Grant Application Package:

- PureEdge files have an .XFD extension
Smith-01.XFD
Smith-02.XFD
Smith-03.XFD
- Adobe files have a .PDF extension
Smith-01.PDF
Smith-02.PDF
Smith-03.PDF

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NIH: Instructions

- When you download the Grant Application Package, download any accompanying Instructions. [NIH R01](#)
- The NIH program announcement includes information about required forms and attachments, page limitations, budget limitations, and NIH contact information.
- Follow the NIH Grants.gov Application Guide SF424 (R&R): <http://grants.nih.gov/grants/funding/424/index.htm> unless the program announcement instructs otherwise.

University of Iowa NIH "Pop-Up" Help Page
http://research.uiowa.edu/dsp/main/downloads/gg_nih_help2A.pdf

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Example: US Dept. of Education

CFDA Number: 84.324: Research in Special Education
Opportunity Number: ED-GRANTS-030308-007:
Special Education Research CFDA 84.324A-1
Competition ID: 84-324A2009-1
Competition Title: Special Education Research
Agency: U.S. Department of Education
Opening Date: 04/28/2008
Closing Date: 06/26/2008

<https://apply07.grants.gov/apply/UpdateOffer?id=12353&is2006=true>

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After you submit: What next?

Validation outcomes:

- (1) Accepted by the federal funding agency
vs.
- (2) Withdraw/Reject & Resubmit

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NIH Validations and Grants.gov

- A successful NIH submission must meet the validation standards set by **both** Grants.gov and NIH eRA Commons
- Both of the following check for completion of mandatory fields and inclusion of mandatory attachments:
 - Grants.gov form itself** (prior to submission)
 - NIH eRA Commons** (after agency retrieval),

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Validations: NIH vs. Grants.gov

- NIH has a more stringent set of validation rules than does Grants.gov.
- A yellow field in the application means that *Grants.gov* will not permit the submission.
- However, even if no yellow fields remain, the *NIH validation* may reject the application due to **NIH errors**.

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NIH Validation: **Errors** vs. **Warnings**

- An NIH Commons validation **ERROR** means that the submission is not successful and the application will not go forward in the review process.
- An NIH Commons validation **WARNING** means that some inconsistency was found that **might** need to be changed (better check!), but that the application will move forward for further review.

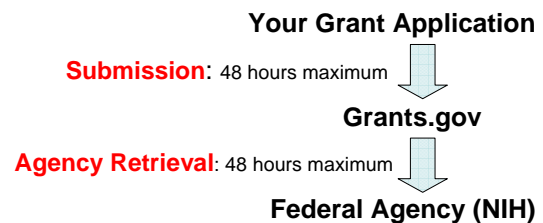
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Allow Adequate Lead time for:

- **INTERNAL REVIEW**, to minimize validation errors and warnings.
- **RESEARCH PLAN COMPLETION** and uploading by the PI, prior to submission of the application by the institution's authorized official.
- **BUSY SERVERS** at Grants.gov and the as the deadline approaches.
- **REVISION & RESUBMISSION** if the validation processes find errors, or warnings that must be fixed.

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Grants.gov: Submission and Retrieval



Submission & Retrieval **could** take 4 days!

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What You'll Need to Complete the Application Package

- Institutional data (similar to that required for the paper PHS398 forms)
- PI and Key Person contact information and biosketches (in proper format)
- Budget (preferably) on a spreadsheet
- Attachments (NIH: all text attachments are in PDF format)

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NIH Attachments: Must be PDF

- Create each attachment in MS Word (or similar text editor).
- Convert the final version of the document to PDF using **Adobe Acrobat** or **CutePDF**. You'll need to have one of the following installed on your computer to *convert* to PDF:
 - Adobe Acrobat (not free) (Note: This is NOT the Adobe Reader!)
<http://www.adobe.com/products/acrobat/matrix.html>
 - CutePDF Writer (free)
<http://cutepdf.com/Products/CutePDF/writer.asp>
 - CutePDF Pro (not free)
<http://cutepdf.com/Products/CutePDF/Pro.asp>
- Do not add headers (PI name) or footers (page numbers)
- NIH provides the format for some attachments:
<http://grants.nih.gov/grants/funding/424/index.htm>

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Can't I just **SCAN** everything to a PDF file? (Answer: *No!*)

- The only documents that should be **scanned** to PDF (rather than **converted** to PDF) are letters of support and other appendix documents that are not available electronically and **MUST** be scanned.
- Why? Scanned documents can create HUGE (**100's of MB**) files if not done correctly.
- The average size of the **entire application** (if the attachments are converted properly and **NOT** scanned) is usually only **10-20 MB**.

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Attachment tips: File Names

- **PDF ATTACHMENT FILE NAMES:**
Use **short file names** for your PDF attachments and **DO NOT USE SPECIAL CHARACTERS IN THE PDF FILE NAME!** ("&" = Fatal Error)
- **APPLICATION FILE NAMES:**
Be sure to save **versions** of the Grant Application Package as you add attachments:
 - Smith-01.XFD
 - Smith-02.XFD
 - Smith-03.XFD

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"Check package for errors"

- Use the "Check Package for Errors" button (circled on the next slide) in the PureEdge (or Adobe) Grant Application Package to check for **Grants.gov** errors.
- The "Check Package for Errors" button checks for **Grants.gov** errors - errors common to all 26 Federal agencies using the system.
- Even with **ZERO** Grants.gov errors, the application can still fail the **agency** error check. NIH errors will be shown in the eRA Commons. Other agencies handle errors in their own way.

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This button only catches Grants.gov errors - not NIH validation errors

The screenshot shows a web-based application form. At the top, there are buttons for 'Save', 'Print', 'Cancel', and 'Check Package for Errors' (which is circled in red). The form fields include:

- Opportunity Title: Research Project Grant (Parent R01)
- Offering Agency: National Institutes of Health
- CFDA Number: [blank]
- CFDA Description: [blank]
- Opportunity Number: PA07 070
- Competition ID: VERSION-2A-FORMS
- Opportunity Open Date: 01/05/2007
- Opportunity Close Date: 01/03/2010
- Agency Contact: Grants Info, TTY 301.451.0000, E-mail: GrantInfo@nih.gov

 A blue text box on the right side of the form reads: "This electronic grants be used to apply for if opportunity reference. If the Federal funding opportunity for which this application package "Cancel" button at the then need to locate it opportunity, download apply." Below the form, there is a section for "Application Filing Name" and "Mandatory Documents" with a "Move Form to Submission List" button.

Submission and Validation

- AOR submits the application through Grants.gov
- A [confirmation page](#) is seen, providing the Grants.gov TRACKING NUMBER: (For example: **GRANT00479723**)
- Then at least four email messages begin to arrive.
 - Grants.gov receipt
 - Grants.gov validation
 - Agency retrieval
 - Agency tracking number assigned
- These NIH Commons emails are sent to the PI and AOR. NIH: Agency e-mail notifies whether the application contains **errors (fatal)** and/or **warnings (usually not fatal)**.
- These e-mails may arrive in **15 minutes**, or **up to 4 DAYS!**

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NIH:

Errors, Warnings and Corrected Applications

- An **ERROR** is fatal. The application will NOT go forward for review.
- Errors must be corrected by submitting a **corrected application** via Grants.gov **prior to the agency deadline**.
- **Warnings** should be reviewed and corrected, if required. Warnings will generally NOT impede the progression of the application in the review process unless the "warning" turns out to be a serious matter (e.g., \$500k/year direct cost limit).
- Most Warnings are minor and do not require correction/resubmission – but you still need to check!
- Some Warnings can be avoided by ensuring that PIs and Key Persons have updated their data in the eRA Commons Personal Profile

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NIH: Accepted on the NIH Commons

If no NIH validation Errors are seen, the NIH Commons will:

- Assemble the grant image as a PDF document
- Generate a Table of Contents
- Insert headers (PI name) & footers (page numbers) on all pages
- Cover letter and Appendices are separated from the rest of the application, and no headers or footers are inserted on those documents.

AOR and PI should then review and verify the grant image in the eRA Commons. Rarely, weird transmission errors can occur.

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NIH: Check the Application on the Commons

- NIH allows 2 business days for the PI and Signing Official (SO) to review the application on the NIH Commons.
- Only the SO can reject the application if the PI or SO determines that warnings must be addressed.
- If the application is rejected, a "Changed/Corrected Application" must be submitted.
- If no action is taken within the 2-day period, the application will **automatically** move forward in the NIH review process.

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NIH: Corrected Applications *prior to* The Submission Deadline

Prior to the submission deadline, the AOR/SO can reject the application and submit (again, prior to the deadline) a **changed/ corrected application** to Grants.gov.

An NIH cover letter explanation for the changed/corrected application is **NOT needed**, since the NIH deadline has not passed.

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NIH: Corrected Applications *after* The Submission Deadline

TO CORRECT A WARNING:

If the AOR/SO rejects the application **after the submission deadline** to address warnings, a changed/corrected application can be submitted within the TEMPORARY **two business day*** correction window NIH is allowing **during the transition**. A cover letter must be attached to the application package, explaining the reason for the delay.

TO CORRECT A USER ERROR (e.g. TYPOGRAPHICAL ERROR):

If the AOR/SO rejects the application **after the submission deadline** for some reason other than Grants.gov or NIH Commons system issues or warnings, a changed/corrected application can be submitted to Grants.gov. **HOWEVER**, applicants need to be cautioned that **these applications will be subject to the NIH late policy and may not be accepted**. A cover letter must be attached to the application package, explaining the reason why the application is late.

*used to be 5 business days 42

NIH: Grants.gov Resources

- NIH application instruction guide(s)
<http://grants.nih.gov/grants/funding/424/index.htm>
- NIH Grants HELP!
 - Phone: 301-435-0714; 301-451-0088 (TTY)
 - GrantsInfo@nih.gov
 - <http://era.nih.gov/ElectronicReceipt>
- NIH - Avoiding Common Errors
http://era.nih.gov/ElectronicReceipt/avoiding_errors.htm

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Grants.gov Bootcamp: Part I

So far, we have presented the basics:

- Institutional registration issues
- Getting started with Grants.gov
- Grants.gov submission procedures

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Grants.gov Bootcamp: Part II

Next, we will present some details:

- Filling out the PureEdge SF 424
- Filling out the Adobe SF 424
- Specific Tips for the administrator
- Focus on the new **ADOBE** forms

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NIH Grants.gov Info Page

- University of Iowa's WEB page for NIH Grants.gov details:
<http://research.uiowa.edu/dsp/main/index.php?get=electronicsubmissionnihgrants.html>
- Georgia Tech's WEB page for NIH Grants.gov details:
<http://www.osp.gatech.edu/grants.shtml>

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“What do I put in the boxes?!”

Filling out the NIH Grants.gov Forms:

- **Pop-Up Help (For PureEdge Forms):**
http://research.uiowa.edu/dsp/main/downloads/gg_nih_help2A.pdf
- **Grants.gov Tutorial (PureEdge Forms)**
http://grantsgov.tmp.com/static2007/flash/Application_Package.swf
- **Grants.gov Tutorial (Adobe Forms)**
http://grantsgov.tmp.com/static2007/flash/AdobeReaderApplicationTutorial_skin.swf

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Adobe Form Issues

- Are you using the correct version of Adobe? Adobe compatibility test:
<http://www07.grants.gov/applicants/AdobeVersioningTestOnly.jsp>
- Common Adobe Error Messages
<http://www07.grants.gov/assets/AdobeReaderErrorMessages.pdf>
- Adobe Reader 8.1.1 (or higher) is compatible with **VISTA**
http://www.grants.gov/help/download_software.jsp#adobe811

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NIH PureEdge→Adobe Transition Plan

- NIH will use PureEdge for receipt dates through December, 2008
- Exception: **3 NIH Adobe Pilots** (mid-October, 2008 receipt dates):
<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-090.html>
- Majority of NIH FOAs will be posted with Adobe forms in December, 2008

NIH Transition Plan

<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-073.html>

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NIH PureEdge→Adobe Transition Plan

Adobe forms for other NIH mechanisms:

- **Research Career Development**
All Ks except K12
Submission Date: February 12, 2009
- **Individual National Research Service Awards (NRSA) F**
Submission Date: April 8, 2009
- **Institutional NRSA & Other Training**
(T, D), D43, D71/U2R and K12
Submission Date: September 25, 2009

NIH Transition Plan

<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-073.html>

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NIH R01: PureEdge vs. Adobe

NIH R01 – PureEdge Form

<http://apply.grants.gov/apply/UpdateOffer?id=6298>

NIH R01 – Adobe Form

<http://apply07.grants.gov/apply/UpdateOffer?id=7706>

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APPLICATION FILING NAME

ISSUE:

What should be entered for the
Application Filing Name: ?

TIP:

PI's LAST NAME - short TITLE:

“SMITH – You Gotta Have Heart”

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APPLICATION FILING NAME

The Application Filing Name:

SMITH – You Gotta Have Heart

Why this format? *It makes tracking easier:*

- (1) Grants.gov status e-mails
- (2) Grants.gov Applicant Status List

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-----Original Message-----

From: support@grants.gov [mailto:support@grants.gov]

Sent: Monday, June 11, 2007 2:35 PM

To: nih@uiowa.edu

Subject: Grants.gov Submission Receipt GRANT00285095

Your application has been received by Grants.gov and is currently being validated.

Your submission was received at 11-Jun-07 03:35:18 PM EDT

Type: GRANT

Grants.gov Tracking Number:GRANT00285095

We will notify you via email when your application has been validated by Grants.gov and is ready for the Grantor agency to retrieve and review.

DUNS Number: 0627616710000

Application Name: Smith – You Gotta Have Heart

Opportunity Number: PA-06-180

Opportunity Name: NIH Small Research Grant Program (Parent R03)

AOR Name: John Massa

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Opportunity #	Competition #	Grants.gov #	Date/Time Received	Status	Agency Tracking #	Submission Name	Request Amount
3.110 5-T73-07-001	2678	GRANT00286639	22-May-07 12:42:29 PM	Tracking 07 Assigned PM	44287	Harper-The Iowa LEND Project	500000
3.999 HRSA-07-106	2469	GRANT00286295	10-May-07 08:10:15 PM	Agency 11-Mat Tracking 07 Assigned PM	44912	Mulhausen - Genetic Education Center	429611
PA-06-180	VERSION-2-FORMS	GRANT0027200	25-May-07 02:17:15 PM	Received by Agency 25-Mar-07 02:48:11 PM		Yu - Enabling Ranking in Medicine	150000
PA-06-180	VERSION-2-FORMS	GRANT00273489	30-May-07 12:16:31 PM	Agency 30-Mar-07 Tracking 07 Assigned PM	2999148	Yu - Enabling Ranking in Medicine	150000
PA-06-180	VERSION-2-FORMS	GRANT00283819	08-Jun-07 05:54:51 PM	Agency 11-Jun-07 Tracking 07 Assigned PM	3003185	Ceyer - PK	150000
PA-06-180	VERSION-2-FORMS	GRANT00283837	08-Jun-07 05:01:56 PM	Agency 11-Jun-07 Tracking 07 Assigned PM	3003189	Gray - Viral Zoonoses/Responses	145304

“What do I put in the boxes?!”

Filling out the NIH Grants.gov Form:

Pop-Up Help:

http://research.uiowa.edu/dsp/main/downloads/gg_nih_help2A.pdf

[Download an NIH R01 Grants.gov PureEdge package](#)

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“My PureEdge edits disappeared!”

ISSUE:

How to respond to a user who claims: “All of my edits on the PureEdge form keep disappearing after I KNOW I’ve saved them!”

TIP:

No, the edits didn’t disappear. The EDITED file was saved by PureEdge to a different folder. You opened the old (PRE-EDITED) file and thus it appeared that the edits “disappeared.” Name your files consecutively so you can tell which file you are looking for.

Smith-03.XFD

Smith-04.XFD

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“What do I put in the boxes?!”

Filling out the NIH Grants.gov Form:

Pop-Up Help:

http://research.uiowa.edu/dsp/main/downloads/gg_nih_help2A.pdf

[Download an NIH R01 Grants.gov PureEdge package](#)

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Labor-Intensive E-mails to the PI

ISSUE:

Labor-intensive e-mails to the PI and helpers about “Corrections needed” prior to Grants.gov submission.

TIP:

Use a “canned” e-mail response that includes common errors. It’s much easier to DELETE than to COMPOSE.

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Creating "canned" e-mails

How do you create "canned" e-mail responses?

One way:

Use the "Signature" feature in MS Outlook to create "signatures" that are actually your canned text.

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E-mails to the PI for Corrections

Professor Smith

I made some minor edits to the application, renamed the file

Smith-03.xfd

and uploaded the new version to the UIRIS Grants.gov Uploads Page. ****IMPORTANT**** To prevent the loss of my edits, please make your changes directly to this file (**Smith-03.xfd**), the one that is on the UIRIS Grants.gov Uploads page now at: <http://uiris.research.uiowa.edu/>

When you have completed your edits (see below) save the file to your local drive, rename it

Smith-04.xfd

(or a higher number) and upload it to UIRIS by clicking the "Edit" button to the right of the record on the UIRIS Grants.gov Uploads page. Then simply BROWSE to the new file and replace the current one. DO NOT DELETE THE ENTIRE RECORD AND THEN CREATE A NEW RECORD (that is, do not start over by entering the title, deadline date, etc. again).

Here are the edits that you need to complete. Please let me know via e-mail when you are 100% finished.

E-mails to the PI for Corrections

PHS 398 MODULAR BUDGET COMPONENT

##Budget Justification/Personnel Justification: Note that there are new NIH guidelines for expressing effort. You cannot use the term "person months," as you have for all personnel currently listed.

"% effort" must now be expressed in "calendar months effort" (for 12-month UI appointments) or "Academic Months + Summer Months" (for 9-month appointments). The term "person months" cannot be used because it does not specify the type of appointment.

For example, for a 12-month appointment:

"50% effort" [OLD WAY] = "6.0 calendar months effort" [NEW WAY]

For example, for a 9-month appointment:

"50" effort" [OLD WAY] = "4.5 Academic months + 1.5 Summer months" [NEW WAY]

See the corresponding section on the help page for additional details:

http://research.uiowa.edu/dsp/main/downloads/gg_nih_help2A.pdf

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E-mail to the PI for Corrections

"Corrections Needed" e-mail to PI:

"Please make the following corrections to your proposal..."

<http://uidspfflood.com/CorrectionsNeededEmailToPI.txt>

This is just an example, of course.

The point: You can create a "canned" e-mail with ALL of your most "popular" corrections, and then just DELETE the corrections that do not apply to your review of any one particular application.

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"What do I put in the boxes?!"

Filling out the NIH Grants.gov PureEdge Form:

Pop-Up Help:

http://research.uiowa.edu/dsp/main/downloads/gg_nih_help2A.pdf

[Download an NIH R01 Grants.gov PureEdge package](#)

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General Grant Information	
PI Name	Harata, Charles
Institution Name	THE UNIVERSITY OF IOWA
School Name	
Division Name	
Department Name	
Application ID	1927
Proposal Title	Optical monitoring of glutamatergic synaptic transmission in the CDB
Proposal Receipt Date	06/13/2007
Last Status Update Date	06/13/2007
Current Award Notice Date	
Application Number	Grants.gov
Project Period Begin Date	04/01/2008
Project Period End Date	03/31/2010
Application Status	Submission Complete
PHS	PHS01-01-10H-EXPLORATORY/DEVELOPMENTAL RESEARCH GRANT PROGRAM (PARENT R21)
NIH Appl. ID	T48177

E-mails to the PI for Review of the Proposal on the NIH Commons

"Warnings Only" e-mail to PI.

Take a look at your proposal on the NIH eRA Commons
<http://uidspfood.com/WarningsOnlyEmailToPI.txt>

This e-mail is sent AFTER the proposal is on the NIH eRA Commons, and the PI is wondering what he/she should do now. Again, you can include all of the most common information and instructions, and simply DELETE those sections that do not apply.

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Searching for forms on Grants.gov

TIP: All Grants.gov "search" pages are NOT EQUAL

Grants.gov: **DOWNLOAD APPLICATION PACKAGE**
https://apply07.grants.gov/apply/forms_apps_idx.html

This Grants.gov search page will also find "unadvertised" Grants.gov packages, such as HRSA non-competing applications.

Grants.gov: **SEARCH GRANT OPPORTUNITIES**
<http://www07.grants.gov/search/basic.do>

This Grants.gov search page will NOT find all Grants.gov packages. For example, it will NOT find HRSA non-competing applications.

[Examples](#)

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MS Windows VISTA & Grants.gov

What's up with VISTA?:

- Adobe (all versions) now supports Microsoft Windows VISTA
- Adobe Reader 8.1.1 or higher (NOT 8.0!) is REQUIRED
- Grants.gov PureEdge is still not supporting VISTA *and never will, because the PureEdge forms are being phased out.*

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Adobe Reader versions

- Adobe Reader 8.1.1, 8.1.2, & 9.0 have been "packed" with special "Grants.gov" functionality to make the new Adobe Grants.gov forms work properly.
- Can you use other Adobe Readers (e.g., 8.0) or products to complete Grants.gov forms?

NO! Some features may work when FILLING OUT the Adobe form, but problems can arise during SUBMISSION – a bad time to find out you have a form problem.

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Test Your Adobe Reader Version

To verify if you have a compatible version of Adobe Reader installed, click on the following test application:

ADOBE VERSIONING TEST APPLICATION PACKAGE
<http://www.grants.gov/assets/ADOBE-VERSIONING-TEST-ONLY.pdf>

If you see an error message, you have the wrong version of Adobe Reader.

If you can see the application package, your version of Adobe Read is OK.

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Adobe Forms: Still need a Help Page for your specific institution

As for the PureEdge forms, Adobe forms "require" some sort of Help Page that gives some guidance, reminders and specifics to answer the recurring question: "What goes in this box??"

University of Iowa
NIH Grants.gov "Pop-Up Help" page
http://research.uiowa.edu/dsp/main/downloads/gg_nih_help2A.pdf

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Adobe Forms: Some Nice Features

Drop down CALENDAR for entering DATES

<http://www.grants.gov/assets/AdobePEFAQs.pdf>

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Adobe R01

Adobe Form “Irritations”

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NCURA PRA-III Concurrent Session: Grants.gov Update

Wednesday, August 13, 2008: 8:00am – 9:30am

Presenters:

John Massa – john-massa@uiowa.edu
University of Iowa

Michelle Powell - michelle.powell@osp.gatech.edu
Georgia Institute of Technology

The latest information on Grants.gov, especially for NIH applications.

Download the latest version (8/9/08) of this PowerPoint presentation

<http://uidspfflood.com/pr-3-gg-update.ppt>

Download the latest version (8/9/08) of the complete PDF handout

<http://uidspfflood.com/pr-3-gg-update.pdf>

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Adobe Form Irritations: *Can't open the Adobe forms until moved to the right*

➤ Pure Edge:

You **can** open the forms when they are in the “left box” OR the “right box.”

➤ Adobe:

The forms can be opened ONLY after you move them from the left to the right “box.”

PureEdge Form: [PureEdge R01](#) [[backup-?X?](#)]

Adobe Form: [Adobe R01 Pilot](#) [[backup](#)]

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Adobe Form Irritations: Still can't print the entire proposal

➤ Pure Edge:

Can't print the entire proposal (including attachments) at once.

➤ Adobe:

SAME: Can't print the entire proposal (including attachments) at once.

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Adobe Tutorial – for all agencies

➤ Adobe On-Line Tutorial ~10 minutes (takes a while to load but it's pretty good)

http://era.nih.gov/ElectronicReceipt/files/adobe_transition.pdf

➤ Adobe Reader and PureEdge Viewer FAQs:

<http://www.grants.gov/assets/AdobePEFAQs.pdf>

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3 NIH Adobe Pilots: Real Adobe Forms!

Announcement of a Pilot for the Transition from PureEdge to Adobe-based SF424 (R&R) Grant Application Forms:

<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-090.html>

- Immune Defense Mechanisms at the Mucosa (R21)
RFA-AI-08-020
<http://grants.nih.gov/grants/guide/rfa-files/RFA-AI-08-020.html>
- Harnessing Inflammation for Reconstruction of Oral and Craniofacial Tissues (R01)
RFA-DE-09-001
<http://grants.nih.gov/grants/guide/rfa-files/RFA-DE-09-001.html>
- Harnessing Inflammation for Reconstruction of Oral and Craniofacial Tissues (R21)
RFA-DE-09-002
<http://grants.nih.gov/grants/guide/rfa-files/RFA-DE-09-002.html>

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NIH PureEdge→Adobe Transition Plan

- NIH will use PureEdge for receipt dates through December, 2008
- Exception: **3 NIH Adobe Pilots** (mid-October, 2008 receipt dates):
<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-090.html>
- Majority of NIH FOAs will be posted with Adobe forms in December, 2008

NIH Transition Plan

<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-073.html>

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NIH PureEdge→Adobe Transition Plan

Adobe forms for other NIH mechanisms:

- **Research Career Development**
All Ks except K12
Submission Date: February 12, 2009
- **Individual National Research Service Awards (NRSA)**
F
Submission Date: April 8, 2009
- **Institutional NRSA & Other Training**
(T, D), D43, D71/U2R and K12
Submission Date: September 25, 2009

NIH Transition Plan

<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-073.html>

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NIH Adobe Application Guides

- **NIH Adobe SF424 (R&R) Application Guide**
MS WORD
http://grants.nih.gov/grants/funding/424/SF424_RR_Guide_General_Adobe_Pilot.doc
PDF
http://grants.nih.gov/grants/funding/424/SF424_RR_Guide_General_Adobe_Pilot.pdf
- **NIH Adobe SF424 (R&R) Form FAQs**
http://era.nih.gov/ElectronicReceipt/faq_special.htm#adobe

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3 NIH Adobe Pilots – the details

Immune Defense Mechanisms at the Mucosa (R21) RFA-AI-08-020
FOA: <http://grants.nih.gov/grants/guide/rfa-files/RFA-AI-08-020.html>
FORM: <http://apply07.grants.gov/apply/UpdateOffer?id=7719> [backup]

Harnessing Inflammation for Reconstruction of Oral and Craniofacial Tissues (R01) RFA-DE-09-001
FOA: <http://grants.nih.gov/grants/guide/rfa-files/RFA-DE-09-001.html>
FORM: <http://apply07.grants.gov/apply/UpdateOffer?id=7706> [backup]

Harnessing Inflammation for Reconstruction of Oral and Craniofacial Tissues (R21) RFA-DE-09-002
FOA: <http://grants.nih.gov/grants/guide/rfa-files/RFA-DE-09-002.html>
FORM: <http://apply07.grants.gov/apply/UpdateOffer?id=7708> [backup]

FOR COMPARISON WITH NIH PureEdge Forms: PureEdge Parent R01
FORM: <http://apply.grants.gov/apply/UpdateOffer?id=6298> [backup-?X?]

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Adobe Problems: "Broken Pipe"

"Broken Pipe" - Adobe Reader Error Message
http://grants.gov/aboutgrants/program_status.jsp

When submitting an application with Adobe Reader some users are receiving an error message titled; "Intake Servlet Is Unable to Save the Data. Broken Pipe."

This means there were intermittent interruptions during submission, and the application **MAY** or **MAY NOT** have been successfully submitted.

No Grants.gov **CONFIRMATION PAGE** and no Grants.gov **TRACKING NUMBER** are seen.

Adobe Reader Error Messages

<http://grants.gov/assets/AdobeReaderErrorMessages.pdf>

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Adobe Problems: "Broken Pipe"

How to check if your application was submitted successfully after seeing the "Broken Pipe" error message:

- (1) **Track Your Application** (at Grants.gov)
http://grants.gov/applicants/track_your_application.jsp
- (2) **Open a new browser window and resubmit.** If no Grants.gov CONFIRMATION PAGE appears, contact Grants.gov:
1-800-518-4726; support@grants.gov
- (3) **Contact Grants.gov** to verify submission:
1-800-518-4726; support@grants.gov

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Adobe Problems: "Broken Pipe"

- Current "solutions" to the "Broken Pipe" error message are not good.
- We need to know with certainty if the submission was successful or not!
- "Calling Grants.gov" to verify the submission is not a solution when your institution is submitting many proposals.

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Adobe Problems: Resources

"Broken Pipe" - Adobe Reader Error Message:
Complete Grants.gov Explanation

http://grants.gov/aboutgrants/program_status.jsp

Adobe Reader Error Messages

<http://grants.gov/assets/AdobeReaderErrorMessages.pdf>

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Grants.gov Webcasts: Adobe etc.

Grants.gov Stakeholder Webcast (07/16/08)

http://grants.gov/help/stakeholder_communications.jsp

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Adobe Forms: Do they really solve the "Mac" problem?

Yes. The "Mac" problem will be solved. Mac users will be able to fill out Grants.gov Adobe forms using Adobe software.

(THAT was easy!)

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When will PureEdge forms be discontinued?

- The retirement date for the PureEdge forms depends on the timing of the roll-out of the Adobe forms. Currently, the "retirement" date is June 30, 2009.
- There will definitely be a period of overlap so we will need to continue to support BOTH PureEdge forms and Adobe forms for the next 11 months to a year.

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Still need to view PureEdge forms!

- IMPORTANT! Keep PureEdge.

- Any archived PureEdge forms in your local systems will still require PureEdge to open them, so we will all need both PureEdge and Adobe Reader 8.1.1 (or higher) on our machines for the foreseeable future.

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Two Parting Tips: **Tip #1-ERA Access Information**

ERA ACCESS INFORMATION PAGE

A page for all ERA logins that your office uses. Put the text file on a network drive that is NOT public, and create a web link to it.

Grants.gov E-Biz Login
<https://apply07.grants.gov/apply/AorMgrGetID>
USERNAME: XXXcccc
PASSWORD: ZZZddd

etc.

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Two Parting Tips: **Tip #2- NIH Commons Usernames**

EXCEL LIST OF YOUR INSTITUTION'S NIH COMMONS USERNAMES

- 1) Create the list in the [NIH eRA Commons](#)
- 2) Save as an Excel File in a network drive that is NOT public
[All Iowa NIH Commons USERNAMES](#)
- 3) Create a URL to the file in the local drive.

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NCURA PRA-III Workshop-WS4: Grants.gov Boot Camp

Monday, August 11, 2008: 8:30am – noon

Presenters:

John Massa – john-massa@uiowa.edu
University of Iowa

Michelle Powell - michelle.powell@osp.gatech.edu
Georgia Institute of Technology

How to prepare & submit PureEdge and Adobe Grants.gov applications.

Download the latest version (8/6/08) of this PowerPoint presentation:

<http://uidspfflood.com/pr3-3-gg-bootcamp.ppt>

Download the latest version (8/6/08) of the complete PDF handout:

<http://uidspfflood.com/pr3-3-gg-bootcamp.pdf>

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