

## Step-by-Step



### Before you begin: Know where to go for help

- The eRA Commons Help Desk is ready to help you if you have any problems using ASSIST
  - <http://grants.nih.gov/support/index.html>



### Step 1: Find a Funding Opportunity Announcement (FOA)

- Find a FOA of interest in the NIH Guide for Grants & Contracts and record the FOA number (e.g., PA-15-123)
  - <http://grants.nih.gov/grants/guide/index.html>
- The 'Apply Online Using ASSIST' button above the FOA Table of Contents takes you to ASSIST



### Step 2: Make a submission plan

- Carefully read the FOA, noting allowable types of required/optional components and any special instructions
- Define the layout of your application (e.g., define components and who will lead each)
- Decide who will be responsible for data entry in ASSIST and gather their eRA Commons IDs



### Step 3: Login to ASSIST & Initiate Your Application

- Login to ASSIST at <https://public.era.nih.gov/assist> using your eRA Commons account
- Use the **Initiate Application** feature and your FOA number to get started on your application
  - Or, access applications already in progress using the Search feature
- Use the **Add New Component** action to build out your application



### Step 4: Provide application access to your team

- Automatic Edit access is given to: SOs (Signing Official) and AOs (Administrative Officials) at the applicant organization; the PD/PIs designated on the application; and the application initiator
  - Similar automatic access provided at the component level
- Access can be given (or revoked) to additional users using the **Manage Access** action



### Step 5: Enter Application Data

- Use the left-hand component navigation and the top form tabs to move between components and forms
- Multiple users can simultaneously work on your application; only one user at a time can Edit an individual form
- Use the **Validate Component** and **Validate Application** actions to check your entered data against NIH business rules



### Step 6: Finalize your application and prepare for submission

- Use the **Preview Application** action to generate a draft application image in the agency format
- Check the application image for any assembly issues
- Use the **Update Component Status** and **Update Submission Status** actions to lock down editing and prepare your application for submission
  - If additional edits are needed, the application must be returned to Work In Progress status



### Step 7: Submit your application

- Use the **Submit** button on the Summary tab to submit to the agency through Grants.gov
  - Only active for users logged into ASSIST with a eRA Commons account with the SO role
- Provide your valid Grants.gov Authorized Organizational Official credentials when prompted



### Step 8: Track your application status and view your assembled application image

- Use the **View Submission Status Details** link to track your application status
  - If your application successfully processed through to eRA Commons, the 7-digit Agency Tracking # will be hyperlinked to the eRA Commons detailed status screen
  - Check your assembled application image (e-Application) and associated documents in the Other Relevant Documents section of the screen

## Component Status

- **Work In Progress** – Allows editing
- **Complete** – Component data entry is complete
- **Final** – Component has been reviewed by applicant organization and incorporated into the application

# Getting Started: Preparing Your Multi-project Application Using ASSIST

## Application/Submission Status

- **Work In Progress** – Allows editing
- **All Components Final** – All components must be in 'Final' status; must 'Validate Application' to move to next status
- **All Components Validated** – Automatically set after error-free Validate Application
- **Ready for Submission** – Should be set after all internal reviews are done
- **Submitted** – Automatically set after submitting to Grants.gov

## ASSIST Actions

Actions	Notes
<b>Manage Access</b> – Control who has access to your application and what they can do within the system	<ul style="list-style-type: none"> <li>• Access can be controlled across multiple variables: application/component, view/edit and budget/non-budget data</li> <li>• Access managed by users with SO (Signing Official) eRA Commons accounts</li> <li>• SOs can delegate Access Maintainer and Status Maintainer authority to other users</li> </ul>
<b>Add New Component</b> – Add components to your application	<ul style="list-style-type: none"> <li>• Allowable component types (e.g., Admin Core, Core, Project) are defined in the Funding Opportunity Announcement (FOA)</li> </ul>
<b>Add Optional Form</b> – Add additional forms to their application	<ul style="list-style-type: none"> <li>• Available forms defined by Funding Opportunity Announcement and can vary by component type <ul style="list-style-type: none"> <li>○ Examples: PHS Additional Indirect Costs, Subaward Budget, Cumulative Inclusion Report, Planned Enrollment Report</li> </ul> </li> </ul>
<b>Change Component Order</b> – Rearrange components within a component type	<ul style="list-style-type: none"> <li>• Reorder components within a component type (e.g., move Project-003 to be Project-001), but component types themselves (e.g., display all Project components before all Core components)</li> </ul>
<b>Validate Component</b> – Checks your component data against agency business rules	<ul style="list-style-type: none"> <li>• Form fields marked with an '*' must be completed before ASSIST can validate a form</li> <li>• Does not check any cross-component business rules (e.g., limiting each sr/key person in an application to one biosketch)</li> </ul>
<b>Validate Application</b> – Checks your application data against agency business rules prior to submission	<ul style="list-style-type: none"> <li>• Form fields marked with an '*' must be completed before the system can validate that form</li> </ul>
<b>Preview Component</b> – View an assembled component (including forms and attachments)	<ul style="list-style-type: none"> <li>• Does not include bookmarks, Table of Contents, data summaries or biosketches</li> </ul>
<b>Preview Application</b> – View your application in the format used by the agency for review and funding consideration	<ul style="list-style-type: none"> <li>• Cover Letter and Appendices are not part of the application image (maintained separately post-submission)</li> </ul>
<b>Update Component Status</b> – Change your component status	<ul style="list-style-type: none"> <li>• Once a component is 'Complete' or 'Final', no additional edits allowed unless an AO, SO, Status Maintainer, or the application initiator sets the status to 'Work in Progress'</li> <li>• AOs, SOs, Status Maintainers, and the application initiator can change the status to 'Final' directly from 'Work in Progress'</li> </ul>
<b>Update Submission Status</b> – Change your application/submission status	<ul style="list-style-type: none"> <li>• Ability to set an application to Work in Progress is restricted to users with SO or AO roles on their eRA Commons accounts, users granted Status Maintainer authority through the Manage Access action, and the initiator of the application</li> </ul>
<b>Submit</b> – Submits your application to the agency through Grants.gov	<ul style="list-style-type: none"> <li>• Application must be in Ready for Submission status</li> <li>• Available to users with the SO (Signing Official) role on their eRA Commons account</li> <li>• Requires active Grants.gov Authorized Organizational Representative credentials</li> </ul>
<b>View Status History</b> – Provides history of submission status updates related to ASSIST actions	<ul style="list-style-type: none"> <li>• Use of comments when changing status makes the history information more meaningful</li> </ul>
<b>Copy Application</b> – Copies application data to a new application	<ul style="list-style-type: none"> <li>• Attachments are not copied</li> <li>• If copying to a different FOA, a 'best effort' match is done</li> </ul>
<b>Delete Application</b> – Permanently deletes an application from ASSIST	<ul style="list-style-type: none"> <li>• Use cautiously, once it's gone – it's gone!</li> </ul>