Getting Started: Preparing Your Multi-project Application Using ASSIST

Step-by-Step

Before you begin: Know where to go for help

- The eRA Service Desk is available 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-18-123)
  - 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 ID and password
- 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 and component 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
  - Submit button is active for users logged into ASSIST with an eRA Commons account with the SO role
- Provide **Grants.gov Authorized Organizational Representative (AOR)** username and password 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

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Application/Submission Status

- **Work In Progress** – Allows editing
- **All Components Final** – All components must be in 'Final' status
- **Ready for Submission** – Before status is changed, ASSIST does a final validation check on your application
- **Submitted** – Automatically set after submitting to Grants.gov

ASSIST Actions

Actions	Notes
Manage Access – Control who has access to your application and what they can do within the system	• Access can be controlled across multiple variables: entire application/component, view/edit and budget/non-budget data o Limited to users with the SO role or ASSIST_ACCESS_MAINTAINER_ROLE role on their eRA Commons account • SOs can delegate Access Maintainer and Status Maintainer authority to other users on application-by-application basis
Add New Component – Add components to your application	• Allowable component types (e.g., Admin Core, Core, Project) are defined in the Funding Opportunity Announcement (FOA)
Add Optional Form – Add additional forms to your application based on application instructions and needs	• Available forms defined by Funding Opportunity Announcement and can vary by component type o Examples of optional forms: PHS Additional Indirect Costs, Subaward Budget, PHS Assignment Request form
Change Component Order – Rearrange components within a component type	• Reorder components within a component type (e.g., move Core-003 to Core-001) o Applicants can't control order of component types themselves (e.g., can't display all Project components before all Core components)
Validate Component – Checks your component data against agency business rules	• Form fields marked with an '*' (except Project Narrative) must be completed before ASSIST can validate a form • Does not check any cross-component business rules (e.g., limiting each sr/key person in an application to one biosketch)
Validate Application – Checks your application data against agency business rules prior to submission	• Runs component and cross-component validations • Application must be error-free in order to submit
Preview Component – View an assembled component	• Includes forms and attachments • Does not include bookmarks, Table of Contents, data summaries or biosketches
Preview Application – View your application in the agency format used for review and funding consideration	• Cover Letter, PHS Assignment Request Form and Appendices are not part of the application image (maintained separately post-submission)
Update Component Status – Change your component status	• Once a component is 'Complete' or 'Final', no additional edits allowed unless an AO, SO, Status Maintainer, or the application initiator sets status to 'Work in Progress' • AOs, SOs, Status Maintainers, and the application initiator can change the status to 'Final' directly from 'Work in Progress'
Update Submission Status – Change your application/submission status	• Ability to set an application to Work in Progress is restricted to users with SO or A0 roles on their eRA Commons accounts, users granted Status Maintainer authority through the Manage Access action, and the initiator of the application
Submit – Submits your application to the agency through Grants.gov	• Application must be in Ready for Submission status • Submit button available to users with the SO role on their eRA Commons account • Requires active Grants.gov Authorized Organizational Representative (AOR) credentials
View Status History – Provides history of submission status updates	• Use of comments when changing status makes the history information more meaningful
Copy Application – Provides "best effort" copy of application	• Copies application data from one application package to another • Option to copy attachments (attachments won't copy unless you check the box)
Delete Application – Permanently deletes an application from ASSIST	• Use cautiously, once it's gone – it's gone!

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