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Troubleshooting support:

Please contact the eRA Service Desk:

Toll-free: 1-866-504-9552
Phone: 301-402-7469
TTY: 301-451-5939
Web: http://grants.nih.gov/support (Preferred method of contact)
Email: helpdesk@od.nih.gov

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

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DOCUMENT HISTORY

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>10/20/2017</td>
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<td>TCM now supports grantee document submission</td>
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The most current version of this document is available on the eRA website: [http://era.nih.gov](http://era.nih.gov).
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1 Overview of Terms and Conditions

The Terms and Conditions Module (TCM) enables grantee organizations to track due dates and submit supporting documents to satisfy the terms and conditions of their SAMHSA grant applications.

Terms and Conditions User Roles

Users with PI, SO and BO user roles can access TCM, view term tracking, add comments and submit supporting documentation.
2 Accessing TCM

Access TCM from the [ERA Commons Status](https://eracommons.org) screen:

In the Status screen *List of Applications/Grants*, a **View Terms Tracking** action button is available for each grant application that has tracked terms, as shown here:

![Status Result - List of Applications/Grants](image)

Click the **View Terms Tracking** button to open the [View Terms Tracking Details](https://eracommons.org) screen.
3 View Terms Tracking Details screen for grantees

The *View Terms Tracking Details screen, shown below*, opens when you click the *View Terms Tracking* button for a grant in the eRA Commons *Status* screen.

This screen displays the current tracking status of all terms applicable for the grant project period, broken out by budget period.

The PD/PI, BO and SO can view award terms and conditions and submit documents as needed to satisfy those requirements.

![View Terms Tracking Details Screen](image)

**Working in this view:**
Terms and Conditions

- Click a term name to see the text of the term.
- Click the folder icon next to the grant number to open the Commons Status Information screen; or click the Acrobat icon next to the folder to view the Notice of Award.

3.1 Expanded view

Click the plus icon next to the term name to open an expanded view of the term tracking details, as shown here:

![Expanded view of term tracking details]

The expanded view lists the tasks associated with the term, and their due dates. See below for the actions you can take in this view:

**Actions**

- Click on an attachment or a comment to view it.
- Or click the Action buttons to select one of the following actions for a term task:

  - **Prepare Documentation** — Attach documents and comments to the term task in the Additional Materials screen.
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- **Revise Documentation** — Attach documents and comments to the term task or view and edit existing attachments in the Additional Materials screen: If the grantor agency returns your document submission and requests changes or corrections, you can use this action to submit revised materials.
- **View Submission** — View all the attachments and comments for this term task, consolidated into a single PDF.
4 Additional Materials - grantee

This screen opens when you click the Prepare Documentation or Revise Documentation action in the View Terms Tracking Details screen.

Use this screen to upload and attach documents to a tracked term, or to view and edit existing attachments.

You can upload up to 10 files (PDF format only, maximum 6mb each).

The uploaded files will be consolidated into a single PDF attachment.

4.1 Actions

- Upload — Click to browse and select a file to upload;
  and click again as needed to add additional files: another document row will be added to the grid; Browse to select the file to upload. You can include up to 10 files in a single attachment.

  Note: Alternatively, you can drag and drop up to 10 files at a time from your computer to the Submission Content area of the screen to upload multiple files in one operation.

- Delete — Click to delete a file.

- Comments — Enter your comments about this submission: They will be included in the consolidated PDF attachment.
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- **Preview** — Click to preview the complete attachment document: a consolidated PDF that includes the content of all the upload files plus the comments.

- **Save** — Click to save the upload files and the comments. You can click Save anytime, and return later to continue working on the submission. You must click **Save** to save any comments you entered.

- **Submit** — Click to send materials to the awarding agency

- **Remove Draft** — Cancel the document submission: If there was no previous submission then click to delete all uploaded files and comments and close the screen. If this is a revised submission then click to delete any changes (new uploads and/or comments) made since the last Submit action. Files and/or comments made in the previous submission will be kept.

- **Back** — Click to return to the View Terms Tracking Details screen. **Note:** Comments changes won’t be saved unless you click **Save** or **Submit**. Any changes to file uploads will be retained in your draft until you click **Submit**.
5 Submission History - grantee view

This screen opens when you click the Submission History button in the View Terms Tracking Details screen.

This screen displays the history of all grantee documents submitted for all terms on the grant.

The header lists the following information: Organization Name, Core Grant Number, Grant Program (PCC), Project Title, Budget Period Start Date, Budget Period End Date

The history section

Click the plus icon to expand the View Submission History section.

This section lists the history of events concerning RAM submissions for this term.

It contains the following information for each event:
Terms and Conditions

- Event Type (Grantee Submission, Grantor Return Submission, Grantor Submission, Grantor Close)
- Event Date
- Term Name — click to open the View Terms Tracking Details screen
- Award Number
- Due Date
- Updated By — Name and role of the grantee or grantor user.
- File Name — Click to view submitted document.
- Comment