>> Welcome to today's webinar, my name is Megan Columbus, and I'm NIH's program manager for electronic submission of grant applications as

well as being the communications director for the NIH office of extramural research here in NIH's office of the director. I am pleased that you could join us today to learn more about ASSIST, NIH's new tool for electronic submission of multi-project grant applications. I'm here today with my colleague in crime here, Sheri Cummins, who has been the lead for coordinating development of the system for NIH, thanks for joining us today, Sheri. Some seminar logistics for folks. Slides are available for download. You can see on the screen in front of you where to go. It's to grants.NIH.gov and just look for the webinar under latest news and events section there, that way you can, for the slides, you can take notes or do whatever you would like to do with them. We will be stopping for questions at the end of each section of the presentation. So feel free to submit questions at any time by typing them into the question box located into the webinar box tool. If you have any technical issues, you can type them into the chat box and we'll help you take care of those. Sheri is going to be presenting a lot of information today, so we're incorporated learning checks along the way. So this is just fair warning that there will be some pop quizzes. With that, why don't we go ahead and get started. Sheri?

>> So thank you. Yes, I absolutely have been working on this project for two years now and it's been quite a ride. We've been trying to do our electronic submission of competing grant applications since 2005 Megan

and I have been together doing this, we thought this day would never come, so it's pretty exciting to be able to share this with you today.

>> Indeed.

>> So we're going to be talking about ASSIST. I assume you all are joining us today because in some way, shape or form you all are involved in the preparation and submission of paper-based multi-project applications to NIH, so I don't need to tell you what an overwhelming task that is. As we've been talking to people about our plans, I've heard all sorts of horror stories about having thousands of pages of presentations being pulled together, only at the last minute to have additional information added that needs to be re-collated, preprinted and reboxed and sent. So folks are just excited

to have the automatic generation of an application, much less the ability to submit it all electronically through grants.gov, so it's pretty exciting.

So the future is looking pretty bright, though. We are moving to electronic submission. We are going to be using an application that we're going to talk to you about today called ASSIST and it is a vast improvement over that paper process. And it's about time. As I said, it's been since 2005 and to be able to share a time line with you today is really exciting.

>> [indiscernible].

>> Also, Sheri, let's find out what experience our listeners have. So we're going to put a poll up and it's going to ask you about what kind of experience that you have preparing or submitting multi-project

applications to NIH. And I'm going to leave it up just a couple of minutes and we're going to show the results.

The results are coming in just a moment. Just giving us an idea of how familiar you are -- familiar you are with the structure of NIH's applications.

Okay. So we do, we've got a bunch of you that do it regularly. And 17% of you who don't ever do it. So that 17% of you, you know, let us know by questions if you are having a hard time following along and we can slow down and I think the rest of you are right on target here.

>> Great. Since I have been working on this project for a long time, I'm going to have to depend on Megan to jump in if I assume there's some context there that you don't have, especially for this 17%. If

you need to jump in, send a chat and tell us to slow down, please go ahead and do so.

Let's get started with the basic question. What is ASSIST? It does actually stand for something. It stands for the application submission system and interface for submission tracking. But since that's quite a mouthful, we're going to just talk about ASSIST from now on. It is web based. It is used for the preparation and submission of multi-project applications only. We hope that perhaps some day in the future we will be able to use it for other applications as well, but for right now it's serving the need of getting our multi-project applications electronic --

>> There's a couple of people telling us there's some audio

problems. And so keep some feedback coming. If you are having a hard time hearing Sheri or me. Okay? Thanks, go ahead, Sheri, keep going, sorry.

>> All righty. So -- so ASSIST is a web-based system used for the preparation and submission of multi-project applications. And what it does for multi-project applications is basically the same things that Grants.gov downloadable forms does for single-project applications. It provides that mechanism to prepare your application and submit.

>> [indiscernible].

>> So the key features of ASSIST. It leverages the existing eRA Commons credentials that many of you already have. It prepopulates data from the eRA Commons profiles, that's something that folks have been asking

for, for a long time for prepopulation. It validates Grants.gov and NIH business rules before you submit. Again, something that's been a long-time need. Provides preview of the nice application image and this is the image that we actually use for review, so it's not just a cobbled together concatenation of all of the attachments and forms. It is actually the image and its format that would be used for review. We do the automatic generation of headers and footers and we provide the ability to track status within the system itself.

So when can you use it? Well, you can actually use it right now for pilot opportunities. We'll be posting six to nine pilot opportunities in the NIH guides for grants and contracts in Grants.gov and they'll have deadlines between January and September 2013.

For these opportunities, electronic submission will be required. That means no paper applications.

>> All right. So Sheri, let's find out a little bit whether people are interested in applying for these funding opportunity announcements or if they're just interested in checking out the system. So if you can answer the poll knowledge questions, we'll give you just a moment. All right. Sounds good. Can we see the results?

All right. As I thought, we have a lot of people who are here just to check out the system, Sheri. And for those of you who are seeking to apply to these funding opportunities, that's fabulous and we'll make sure that you get what you need.

>> So lots of lookie-lous.

The participating FOAs will clearly state that they are part of the pilot and require electronic submission. And what we've tried to do so that you know whether or not the opportunities that you are looking to apply to are part of that pilot is we've been trying to get as many of them posted as early as possible. For those that we can't post yet we have put out notices of intent to publish. As we have those go out into the NIH Guide we've been putting an update to our time line and the link is there on the slide for you.

Now for opportunities that aren't participating in the pilot, we do have a time line that we can share with you. And just like our previous transitions, they are activity code based. So as of September 25th, 2013 deadlines and beyond, P01s, P50s, R24s, U19 and U24 activity codes will transition to electronic submission, that means new applications, revision applications, resubmissions, renewals, everything will transition at the same time. Then for the following standing deadline, which would be January 25th, 2014, we will be transitioning the remaining activity codes.

And the time line can be -- you can get to the time line and the transition plans via the Guide notice listed on the slide.

So I had already mentioned that we are leveraging Commons credentials for use with ASSIST. All ASSIST users must have eRA Commons credentials with one of the following roles, a Signing Official or SO, administrative official or AO, Principal Investigator or PI, assistance, which is an ASSIST role or the account administrator, which is an AA role.

In addition to having one of those roles in Commons, if you are going to be the person who submits the application, you will also need an active Grants.gov authorized organization representative or AOR account. So that one is actually established through Grants.gov.

>> All right. So let's just find out here how many of our folks have Commons accounts already. If you can just let us know, it will tell us a little bit about your experience.

All right. We'll show you the answers. And looks like lots of you are good to go. Some of you are just looking around and so you don't need one and probably those are NIH staff. And for those of you who still need to get one, you might as well go ahead and start getting registered now. Because no matter when you submit an application to NIH or work in the system, you're going to need that.

>> So for those folks that have not yet registered, the link to resources to help you do that is on the bottom of your screen.

So just some account notes. Since ASSIST leverages the account credentials from eRA Commons and Grants.gov, when you establish your account, you're going to want to work within eRA Commons to make sure that you can log in and that everything is good. Similarly with Grants.gov, you would want to establish your account, log in as an applicant from the Grants.gov interface and verify that everything is working fine and then you can go back to ASSIST and use those accounts.

So let's talk about finding opportunities. Multi-project FOAs are going to be posted in the NIH Guide for grants and contracts, and Grants.gov find and in fact they are posted there even for the paper based submissions. The difference is for multi-project that are participated in the pilot, you will be able to get into the ASSIST system. From the NIH Guide for grants and contracts, within the opportunity, you will see the apply for grant electronically button and also the FOA will clearly state that electronic submission is required. So this is really the same process that we've been using for single-project submissions as well, so this shouldn't be any surprise. Similarly in Grants.gov, once you find the opportunity and get into the FOA text there, in the upper right hand corner is the application link. Again the same process as single project. You would get to a download page. You would click the download button. And then you would be presented with the option to download application instructions and instead of the application package, you'll get a link to agency multi-project system. And that's what's going to take you to ASSIST. So pretty straightforward.

So before jumping into ASSIST, it's really important to take some time to learn about this new process. So back in a multi-project FOA, the screen is actually showing the FOA as it appears in the NIH Guide for grants and contracts. Just like for single-project FOAs, we have information in Section 4, application and submission information, that is critical to helping you prepare your application in ASSIST.

There's also a link to the SF 424 application Guide, which provides general instructions for completing application forms.

As always, the agency-specific logo is used to highlight any NIH specific instructions. And when instructions in the application Guide conflict with instructions from the FOA, the FOA wins.

So when you look at the announcement, you're going to see some guidance in there to follow all application Guide instructions. Of course except for the instructions that talk about downloadable forms in

Grants.gov.

So I'm still in the FOA text in that Section 4. And each of the multi-project application announcements will have a table that will be under page limits that will list the types of components that are going to be allowed for an FOA and the components will be presented to you in ASSIST. It will also tell you for each component type the research strategy page limit that ASSIST will enforce. So in this example, in the overall component, we'll talk about how these are all put together in a moment, but in the overall component, ASSIST is going to enforce that a 12-page research strategy can be submitted. In this particular example, the project component type will be used for a number of different components and it will be talked about within the FOA on which one to choose.

In every multi-project FOA, there will also be the table that's presented here on your screen and this is really just a clarification to application Guide instructions that apply to all multi-project applications.

The difference here is the application Guide is really written for single project, so there's a few differences between what you would be talking about the entire application and the overall component, there's a few differences in how you would fill out those same forms for other components.

Following that general table will be additional component-specific instructions. These are instructions that are just going to apply to the FOA that you are applying to from this announcement. If there are three or four different types of component types, you may see this section repeated multiple times, but it will include things like what they are looking for in the research strategy for each component type, how many page limits they are allowing for different attachments and so forth.

>> Sheri, we have a question here.

>> Sure.

>> And I just want to interrupt you with this one because you are referring to the SF424 R&R instructions and they are wondering if those instructions were going to get updated specifically for ASSIST or not.

>> So not right now. So the content of the forms is really the same. As you would do for single project. Just like the PHS 398

instructions have been used for single and multi-projects, it's really the same thing applies here. We are working with some technologies that are allowing us to look at how we do our documentation differently and may in the future allow us to customize things. But for right now, we're using the standard instructions.

>> Thank you.

>> Okay? So let's get familiar with the new format. We've looked at a lot of multi-project FOAs when we did the project and we've also looked at a lot of applications to those FOAs, and I can tell you that no two are the same. So it was kind of a challenge to come up with a structure that could be used by every opportunity but allows the flexibility that we need to customize

announcement to meet the needs of that program. But this is what we've come up and actually seems to be a really good fit.

So every application will have a single overall component. And that overall component talks about the overview of the entire application. So that's what we kind of refer to as that parent application.

So that's going to have things like your cover letter would be part of that. That's where you are going to talk about who are the PD/PIs for your entire application, you're going to talk about how all of the components fit together. It's going to be kind of of that overview of the entire application.

Then for each FOA, we're going to have a number of components that are identified to be allowed for that opportunity. So one opportunity might allow an admin core and cores and projects, and another might have pilot programs, admin cores and research projects. But really the data entry behind those component types is going to be very similar. It's really in the content that they're going to vary.

So the additional components are going to be set on an FOA by FOA basis. And the announcements as we discussed will clearly indicate the types of components expected.

In addition, we're going to provide automatically prepared data summaries. So one thing that might be a little different to you is the overall component will have no budget forms whatsoever. But it will have a budget summary, actually several budget summaries, that take the budget information provided into each of the components and roll it up. And that becomes the overall budget.

Similarly, we have summaries for things like senior/key persons. And performance sites and we'll look at those a little bit later.

So now that we understand the format of the application, it's also important to understand how we're going to pull together that final image because that's going to provide information on how you want to lay out your program in ASSIST.

So multi-project applications are assembled as follows. The overall component is presented first. The data summaries follow the overall component. And then the additional component types are presented in alphabetical order. So, for example, all of the cores are going to show before all of the projects. Within a specific component type, for example cores, they are going to be presented in the order that they were prepared in ASSIST and they will be numbered sequentially in the image once it's generated.

So if you have an application where it's very important to have a specific component show up as core 001, you're going to want to make sure that you initiate that component first when you are using ASSIST.

>> So, Sheri, we have a relevant question here. Will the table of contents that's generated using ASSIST be flexible for each FOA? So, for example, multi-biomedical research core, pilot and feasibility programs, et cetera, for center applications?

>> So the table of contents is going

to follow the -- the order that I just described. So if biomedical cores or biomedical research components are allowed for that FOA, they're going to be presented with their own bookmarks and everything in the table of contents.

>> And all of that is going to be defined by the kinds of -- the kinds of components that will be allowed are defined by the FOA?

>> Absolutely, absolutely. We'll look at some examples a little later.

Okay?

>> Sounds good. Thanks.

>> Great.

All righty. So that's kind of how we're going to pull together your image when we get to eRA Commons. This is just a visual representation of some of the things that we have covered. Overall first, your system-generated summaries and then some number of components. And to make it a little bit easier for our staff here at NIH, we have predefined some component names. So for example you will see admin core, cores, projects, repeated through many FOAs. The one second from the bottom is FOA-specific and that allows our staff on an FOA-by-FOA basis to provide a name for the type of components they want to include and that's what allows that flexibility in the system.

For our pilot, you can see that some of those are starred, overall, admin core, core, project and FOA-specific are the types of components we'll be supporting for our initial pilot. Some of the other components, like construction, career development and training require some additional forms that will be implemented in ASSIST in a future release.

>> Could you give an example of an FOA specific component, the name of one? Sure. Pilot programs.

>> Okay.

>> Okay?

We also have lots of opportunities that have training components, but it's more outreach and training than the type of inner city type training applications that we get at NIH, so you still may see something with a training kind of indicator in the component label because they can be named but they really have like a research structure behind them.

So let's talk about that. Initiate your application and create the application shell.

So this is the first peek, log into ASSIST, our URL is right there, public.era.nih.gov/ASSIST, you're going to use your eRA Commons credentials and you're going to hit that log in button and get in.

The first screen that you come to, you will be able to either initiate an application or search for in-progress applications and you do have to type your funding opportunity announcement there. In the future we hope to be able to automatically populate that and leave it editable. But for now you have to type it in. I hope you can do that in eight or nine strokes there. But you put in that FOA, and you hit go. And there you are. You are off to the races. This is the first screen, this is your initiate application screen. The top of the screen should look pretty familiar, if you've done single-project applications, this is basically that header information that you would see on the managed screen of your downloaded forms. But it's the information that's posted in Grants.gov and basically tells Grants.gov how to route that application once it receives that.

Then the bottom of that same screen provides the minimal information that you need to save that application. So you can see that I have to give it a project title. And, remember, I've used my Commons credentials so I can actually choose from a drop down list of the organizations that are associated with my Commons accounts to populate the remaining information. Okay? That puts in the address and the DUNS number. And it's really important, especially if you are a PI that's initiating this application to choose correctly.

Because once that DUNS number is assigned, you really can't change that.

So many of the security features that are associated with ASSIST are based off that DUNS that it would really be a problem if we had you being able to change that DUNS. So that's a really important step to get right.

>> All right. Sheri. Let's just do a quick learning check to see if our listeners have been paying attention. We have about 400 attendees out there.

>> Terrific.

>> Let's see how you're doing. So we're going to start the question, can anyone at the applicant institution initiate the application in ASSIST? So give us a yes, no or huh, not so sure. We will give you a second to complete that.

DeRon, if you could --

>> Survey says.

>> Give us the results. All right, Sheri, we have 23% saying yes, 70% saying no, be and 7% saying not sure. Can you clarify for us?

>> Sure. So the question really is can anyone in the application -- in the applicant institution do that and first of all you have to have a Commons account. I'm sure there's many people in your institution that don't have Commons accounts. Secondly you have to have a Commons account with one of the roles that we talked about, the Signing Official, the AO, the PI, the assistant, the account administrator so it has to be one of those roles right there. So not everybody in your organization, so there you go, a little bit of a trick.

>> Thank you very much.

>> Ready?

>> Uh-huh.

>> Okay. So we've -- we've initiated this application. We've gone ahead and we've put in the information. We've pulled information from the drop down to get the organization and the DUNS number and we are clicking initiate application and that's saving it for us. Okay? At the top of your screen here, you're going to have that application saved. And we are started here. We've initiated our application, it's just that easy. At the top of the ASSIST screen, we have some handy links. Help desk and log out are up there. We have the little question mark icon throughout ASSIST that will give you some great online help and we'll give you an example of that towards the end of the presentation. We're just kind of

getting a feeling for the screen here.

This is the ASSIST message saved for the last action that I just did which was to initiate that application. And then over here we've got actions. So this is the upper left-hand corner of the screen. The actions are going to be dependent on where you are in the application and also some of the roles that you have on the application will determine what action buttons are available to you. So, for example, if you are not a Signing Official, you are never ever going to see a submit application button. If you are in a component, you are not going to be able to see things that affect the application as a whole. You would have a different set of buttons, so it's going to be dependent on where you are in the application and also your role.

So when I look at the roles -- I'm sorry, the actions available to me right now, I have two. View status history and add overall component. Well, we haven't done much, so view status history would be kind of boring. And we know that we need to add an overall component, so let's start there.

This is really the beginning of starting to build out your application. So you click that add overall component button and you get another screen and it's very similar. You will see that it's kind of the similar process, you initiate it and it gives you a screen with the minimal information that you need to save it. You initiate the overall component, you get a screen with the minimal information needed to save that overall component, you add another components and it goes through the same process and that's really how we're going to build this out. But this is the overall component and we have to fill out the information that's there. It's the application type, whether it's new, revision, resubmission, renewal, your start, end date of the entire application. Your project title for the entire application. It's got the lead organization information there that was actually pulled from our Commons ID And then right down there on the bottom, you have the ability to put in a Commons ID and identify the contact PD/PI for this application. So in this case, I typed Cher D Money 4, hit that populate name from user name and it populated the rest of the information and saved some additional information throughout the application.

Okay? So I'm going to click save and at that point my overall component has been added to my application and it will start building that out, you will see it added to the navigation in the lower left hand of your screen there.

So what happened there is we went back to Grants.gov and we said, hey, I just added an overall component, what are the forms that I'm supposed to fill out for that overall component and it told us. And then ASSIST is smart enough to get that list and put the forms across the top in tabs. So to fill this out you would really just go tab by tab and fill in all of your application data. But we're going to hold off on that and keep going with the shell.

So shame process but you will notice that my button no longer has an add overall, because there's only one add overall in any application, but it has an add new component button, so I'm going to click that one. The add component is a little bit different than the adding overall because I have to choose what kind of component I want to use. So in this particular case, this FOA allows admin cores, projects, cores and something that we just call component X. And I would have to choose the one that I'm actually going to initiate here.

Once I make my selection, in this case I chose admin core. Again, I'm going to be presented with the minimal information that I need to save that component, which is really the start and end dates and the project title. The start date is prepopulated from what was given on the overall but it is editable. And the component end date is manually entered at this point, but we do have a request to also prepopulate from the overall and have that editable. So hopefully that will be out there for you in April. So you fill in that data and you hit save. And then my admin core has been added to the navigation down at the lower left-hand corner. And that's basically the same thing that you are going to do as you walk through all of the different things that we laid out in our application.

Now, when you are building your application, your component is going to be assigned a system generated random three digit number. And the reason we're not making them sequential at this point is because there is the ability to abandon a component. So if I do make them sequential right from the get-go, you may have gaps in the sequential numbering. But also because we do in the future want to allow you to reshuffle the order in which they're going to be there and we want to make sure that we have the ability to do that in the future. One of the enhancements that came from our user acceptance testers and for all of you out there that have been helping us, thank you very, very, very much. You'll see, I'm sure, some of the suggestions that you made have already been incorporated and many, many more are planned for April. But one of the suggestions that I thought was fabulous was to provide a short name that can be used when you are preparing your application for each component.

So if I wanted to call this admin core table or the PI's name or whatever it is that I'm going to remember which one I'm working on which is easier than 397 admin core, we're going to provide the ability to give it a short time and you can refer to it by that short name as you prepare your application. So that's going to be a great enhancement in the future.

But again, when I add my component, it's going to go to Grants.gov and say hey this is an admin core, what are the forms that you defined for use with an admin core and then it brings it back to ASSIST and we know exactly what to present to you for data entry. Okay? You just repeat that process for all of your cores and all of your projects until you have your complete shell. Now you can do part of this shell initiation up front and you can add all of your projects later or you can go back and forth. You can do this in whatever way you want. But if you really want to control that application, I do suggest that you get all of these pieces in place before you start filling it out, in case you want to start over or reorder them or something, you don't want all of your data already entered and have to start over. Okay?

The navigation is arranged to put the components -- to group them by component type. So you'll push on the plus or minus buttons to expand or collapse each of the component types to access the components. It's pretty standard. Yes?

>> So are we ready for our next polling question.

>> Hell yeah.

>> Okay. [Laughter].

>> So -- so here we go. How would you know what types of components you can include in your application? Would you do it by -- reading the funding opportunity? Looking in the add component drop down menu? Or both?

As you all think about that question and think about your answer -- we're seeing the numbers rack up. All right. DeRon?

>> We need a little drum roll or something.

>> There we go. All right. Sheri, we've got 28% say reading the funding opportunity announcements.

>> Which is right.

>> Four percent say looking in the add component drop down menu.

>> Which is right.

>> And 71% --

>> So that's the most right.

>> All right. We're doing okay so far.

>> Excellent.

All righty. So it's also a good point to stop and make sure, that's a lot of information about building out that shell. Are there any questions about initiating your application, creating an application shell before we move on to managing application access?

>> All right. So there are. Some of them go back to registration, but I think we should take some of those anyway.

>> Okay.

>> So in order to actually submit an application, do I have to be a Signing Official as well as an AOR with Grants.gov?

>> Yes. You won't get the submit button unless you're a Signing

Official in ASSIST.

>> all right. So there we go. For those of you who are submitting questions about getting help and that kind of thing, we're going to hold those questions for later.

Here's a question about assembling your application. Do cores have to have a number 1, 2, 3, et cetera or can they just have names like a clinical core, statistical core, et cetera?

>> So really they're going to have both. So your components are going to be numbered, so you will have a core 001, core 002, but if you remember, when we initiated each of those components, we gave it a title. So there's a project title in the R and R cover that you can use to name those components.

>> Okay. A whole bunch of people have asked can the project title be

changed after we've started?

>> Yes.

>> Yay. That's a good answer. So although we're going to get to this later, there have been a number of questions about the system submissions and people who are using Colus [PHONETIC] or infoits [PHONETIC] or whoever they are using to submit their applications. They want to understand if we've been working with that communities and they want to know what the implications are for their submission.

>> Absolutely. So the service provider community is just fantastic, we've been working very closely with them. One of the reasons that we chose to have our applications route through Grants.gov, one of the many reasons, is that so many of our

organizations, applicant organizations have put -- put a tremendous investment into the service providers and their system to system solutions. And using Grants.gov we can still accept applications through those services. So as I started in the beginning to say, really what ASSIST replaces is downloadable forms. So -- so if you use a service provider for your single-project applications, I highly encourage you to talk to your service provider and see what their plans are for support. We do have the building blocks there for them, but I do imagine that it's going to take a little while for them to be able to -- handle the application submissions to Grants.gov because they haven't had access to the information for as long as we have to build out the system. So I encourage you to talk to your service provider directly, but they do have the ability to build that in their systems if they choose to.

>> Okay. Um ... there's a lot of -- I'm sorry, I'm trying to get through the questions. Um ... who has to the initiate the application? I think we already went through this. Is it just the Signing Official. This could be a problem for some office-sponsored research.

>> So it does not have to be the Signing Official that initiates the application. We're going to talk in just a moment when we go through these questions here about application access. It is going to be a responsibility of the Signing Official to provide something we call access maintainer authority, but

anybody can actually initiate.

>> There's another question about -- about when you would use ASSIST. Some people are saying that they have renewals coming up this spring, so remember that we're in a pilot stage for ASSIST, which means that there are, you know, six or seven funding opportunity announcements on the street that require the use of ASSIST. You may not use ASSIST for anything besides those until we get to September, which is our first transition of multiple activity codes. Okay?

>> Correct.

>> Elena is asking if you would show us how to abandon cores or projects.

>> I'm actually going to hold on that for a minute because I can point it out when we get to a later step.

>> Sounds good.

>> Uh-huh.

>> And you said that the title of the overall project can be changed. You mean that the components can be changed as well, the titles --

>> Absolutely.

>> So we're not tied to that at all.

>> Correct.

>> So if you were going to -- as you are establishing that shell and you have subcontracts to enter for new components, you're going to get into that later at well?

>> Yes.

>> Okay.

>> Uh-huh.

>> Um ... and we can -- so just like the titles aren't in stone, here's a question about can we change the start and end date after the actual selection.

>> Yes.

>> And the answer is that you can change anything like that --

>> Except the DUNS number. We have tried to make even for the prepopulation, make sure that there's some way to change it. It may not be on -- on the form that you are looking at because some of the source information is on different forms, but there should be a way within the application to change most of the fields to prepopulated.

>> Great. You know, a couple of people have been submitting questions and I think there's some -- we need to clarify a little bit about where this is being done. They're asking about, you know, so do they just download forms from ASSIST instead of from Grants.gov, they are asking whether we are in Commons and not on Grants.gov. So let's talk a little

bit about --

>> Okay, sure.

>> About being in the online environment.

>> That's a really good point. We didn't really cover that very well. This is a web-based system. Very similar to Commons, but this is not Commons, you're going to go to the URL that we provided earlier and you're going to log in and you're going to be working online on the web there. It is not something that you can actually download to your local machine like downloadable forms. It's something that you're going to work right online. There is the ability to do previews that you can then save off to your machine as little snapshots but for the most part you're going to be working right on line there. Once you submit through Grants.gov it's

going to follow the same process that we did for single project in that post-submission you're going to follow your application through Commons and we'll talk about that in a little bit.

>> Okay. So why don't we keep moving on?

>> All righty, great.

>> Ooh, just before that, I'm sorry, can a funding opportunity announcement be changed after initiation?

>> No, it cannot.

>> I didn't think so.

>> We actually are working on some technical solutions to allow you to copy from one FOA to another. The problem with that is that since FOAs can be -- [webcast jumped ahead]

>> So entering application data. So the last time we saw this screen we

were doing the initiate application. But now that we've created the shell and we're getting back in to do our data entry, we're going to use the search applications button.

So this is searching for in-progress applications. I can put in my search parameters, likely to use the last name of the PI. Or even a submission status. But I'm putting in my parameters, I'm hitting search. We also do allow the search to be open-ended, so no parameters selected. And that's what I did in this case because I only had one there for my organization. And I got my hit list. And then I just select that particular opportunity. That application.

Okay?

And then I'm in. From the screen, remember my navigation for the components is in the lower left-hand corner. I would select the component that I want to work with. Of in this case I had selected the overall. And that's going to bring me to the overall component. Every component has a summary component page. And that has the application information towards the bottom, you can see it's a little cut off on the screen shot there, but then it also has the component information across the top. It tells me who the project leads are designated as, who the organization is, all of those good things, the status of the application. In most cases when you get to this step you would have a work in progress status. When I took the screen shot, it actually had a final status. We will talk about the statuses a little bit later.

Remember that the actions are based on where I am in the application. So if some of the actions are only available from this summary page and the actions that are available from this particular summary page are at optional form and update component status. The other options would be available through the other tabs as well. So within this overall component, if I wanted to enter application data, and just as a note here about the bred crumbs across the stop, it's an easy way to do navigation as well. But as I'm in here, I'm going to go form by form across the tabs, I'm going to do any data entry. In this case I have selected the R and R cover, I'm in the overall component. I'm going to select edit and get lock. That's actually a label on a button that has had a little bit of controversy as we did our user acceptance test, they are like what is this get lock, why doesn't it just said edit. We did some polling because so many people were complaining about it, oddly enough edit and get lock tied for first. That was a little bit of a surprise. But we thought we would choose the other one since we had so much controversy and in the future it will actually be called edit. But the concept is there of locking the form. And it's kind of important to know that that concept is going on. So once I physically hit that edit button, I'm the only one then that could edit that form. Even if you have the authority, edit authority for the entire application, I have locked that form. Other people can view it. But I'm the only one that can edit.

We have, for some of our longer forms, the concept of expand all. When that's collected, when that's actually checked off, it actually does expand each of the different field areas. We did have some feedback. Right now it actually defaults to being not expanded. We had some feedback to default to expand it and we will be doing that in the future. But you are basically going to fill out all of your data. It's the same data fields being filled out for single projects. Once you get done with your data entry you are going to do save and release lock. When you do that save and release lock, the system is going to do some checks and make sure that you have filled that in correctly. Right now it's going to require that any of the required fields are actually filled in. That is something that we will be changing in April. We will have an incremental save in April, but for right now you are going to have to fill in all of the required fields before it allows you to save that form.

I'm not going to go form by form, field by field obviously, because we would be here for a very, very long time. But I did want to point out some of the things that might not be too obvious. We just looked at the R and R cover for the overall form. When I'm editing the overall cover for other components that aren't the overall it acts a little bit different. For some policy reasons, I have to reuse the same form, but I don't need to use all of the data. So what you are going to see when you do an expand all on the cover in any component other than the overall is that it's not going to expand all of the fields, it's only going to expand the fields for which I want data. So you can see here that the type of submission, date submitted, date received by state, federal identifier, those things really only apply to an overall, and I'm not going to collect that data. From you system service providers out there, if you send it to me I'm just going to ignore, but you don't have to change your systems to make it not send it. But I'm only going to actually ask for the data that I need. That's going to be just a few fields, it's actually the applicant information, start and end dates, it's the title, those types of fields. Okay? So that's a little bit different on how that form works, that's one of the things that's pointed out, remember when we talked about what the text of the FOA has and it had that table about some general instructions that are different between the overall and working with other components, this is one of those instructions.

Okay? So right here I'm in the admin core, I'm in expand all and this is indicating which one of the fields that actually expanded to allow data entry. Okay?

Now I moved over to the sites form and this one also has a little bit of a difference than the standard forms. In that these -- the site forms that are used with our multi-project applications allows up to 300 additional sites before you have to use an attachment, so that's quite a few sites in there, the primary performance site still is the only one that's absolutely required and we are going to go ahead and require the DUNS number as we do for single projects for the primary site, but you do have the option of adding up to 300 sites, which is quite extensive. Okay?

I wanted to point out a few things on the senior/key person form as well. This is another area where we've provided you with some prepopulation. So when you are in the senior/key person form, you have two options to do prepopulation. You can actually choose from a list of people that have already been used within your application, so there was a question earlier about can you have somebody on multiple components. Absolutely. When you use them on the second, third, fourth, component you can actually just choose them from this drop down list and the information for them will be populated for you. Or you can put in their Commons IDs and we will pull from the Commons' profile and so you have two options for prepopulation there. There's actually a third that isn't prepopulation, your third option, of course, is to do all of the data entry from scratch. This is also a little different in the number of key people that you can put on the form. The forms that we're using for multi-project allow up to 100 senior/key persons before you need to use an additional attachment. Some more tips for filling out this senior/key person form, because this is an area where folks have been confused. In the overall except, you are going to use the project director/Principal Investigator section to designate the contact

PD/PI. For adding additional senior/key, you can use any of your multi-PD/PIs would be added there and for anybody on the overall form, that would be your primary contact PD/PI and any multi--PIs, you are going to use the role of PD/PI. But for all other components, you still have, we can't actually change the name of the field name on the form because it is an OMB cleared form, but you are going to use that project director/Principal Investigator section of the form to designate who the project lead is and ASSIST is going to default to other project lead. Now, your FOA and you want to carefully read that FOA text may tell you to call it core lead for cores and project lead for projects, but in ASSIST it's always going to default to that project lead. What's really important about the roles used on the other components, you cannot use the role of PD/PI, that's why you are going to want to use other and project lead or one of the other ones that are already in the drop down there.

So we've talked about people okay multiple components, the same person being used across multiple components and that is certainly allowed and accepted and expected, actually, but one thing that's important to understand is that even if I'm on five different components, I only have the ability to have one biosketch that covers me for the entire application. Okay, one biosketch for the entire application. And you might ask about what about the personal statement. That is still a requirement of the biosketch or a suggestion of the biosketch and you would want to be able to address all of your roles within the application within that single biosketch and statement. Okay? So that's also a little bit different. We're going to talk a little bit later about how assist handles that if you attach biosketches each time they appear in the application. There's a process that ASSIST will go through to make sure that you reconcile and only have one.

>> Sheri?

>> Sure.

>> Sheri, you keep mentioning form changes in April. Which seem to be confusing some folks.

>> Okay.

>> So we don't have form changes in April so what form changes are you talking about?

>> The changes that I'm actually

talking about, I apologize, that was a bad phrase to use, is that we are changing how we're interacting with the forms in our April release. So in April we'll be putting out additional changes to arsz that will allow us to do things a little bit differently. For example, I think one of the times that I probably used that phrase was when we were talking about saving information. Then April we will be able to save incrementally when you fill out the forms, but the form data will not be changing.

>> So you are just talking about system enhancements.

>> Absolutely.

>> There we go, thanks.

>> Thank you for that clarification. All righty. So senior/key form. This is the budget form. Of course, we all know what the

budget form looks like, but we're going to go to the budget tab here. One of the things that I wanted to point out here, which is something that hopefully will make you all happy is when you add a period within the budget forms in ASSIST, the period will be created with the carryover of entries from the previous period. Everything will be editable, but you won't have to start from scratch when you are filling out those forms, that's something that we heard over and over and over from our applicants that they wanted fixed with single project applications and we are able to at least fix it here for multi-project.

Also, when you are filling out the budget form, just a few more tips. This has been expanded to allow for up to 100 entries in section A for senior/key persons, the current single project forms that are used only allow for eight, so that was expanded to match basically what we are using for senior/key, you can put 100 entries in the senior/key form and up to 100 entries in the budget form for senior/key as well. Wanted to keep those in sync. Just a reminder here because this is always a high error for us when we get applications submitted so remember that anybody included in that section A for senior/key persons, you need to list some measurable effort for them. That's done by listing academics/summer or calendar months for each of those senior/key individuals. Okay?

If you are going to have a subaward on a component, you would be able to add the subaward form by using the add optional form button. And basically it's one of those actions that's over there in your upper right-hand corner of your screen, you click that add optional form and then if a subaward budget is allowed for that component, it's going to provide the drop down list with that form in it.

You just select it and then it will be added to the navigation.

Similarly, when we are working in the overall component, if you want to add a cover letter, you are going to also use that add optional forms button. You click that button, again get the drop down in this case you are seeing the PHS cover letter as the optional form. And then that is added to the navigation as well.

>> Okay. Can we do another learning check?

>> Let's do it.

>> All right. DeRon, when filling out the R and R cover form for component other than the overall, do you need to fill out all of the data fields? Yes, no or I don't know. Let us know what you think.

We'll give you a second to think about that.

All right. Then DeRon, here we go. 7 four percent of you were listening very carefully actually and say no this is a little bits of a trick question, Sheri will say, though, can you elaborate, Sheri.

>> So for those folks that said yes, I'm thinking maybe they thought when we expand it they have to fill out all of the fields that are exposed to them and that would actually be true. So although we are only filling out a subset of fields on the form, you do need to fill out the fields when you

expand all they are exposed to.

>> Basically for each subcomponent there's a subset of information of that overall form that we require and that's all that we require.

>> That's it.

>> Okay. Thanks.

>> Great. Okay.

>> Let's go back.

>> So let's talk about some component actions. So as component data is entered, several actions are available to you when you are working in ASSIST. You can validate a component, you can preview current component, that would be just a -- just a visual of all of the pieces within that component put together for you, or you can update the component status. And we're going to look at each one of those. So let's start with validating a component.

So I'm back up in that upper right -- I'm sorry, left hand section where we have all of our action buttons and I'm going to select the validate component.

When I do that, and it was very quick here, but you have to be patient when you are actually working in ASSIST when you do this because it's going to take a little bit of time to run that service for you, but what that's actually doing is going and checking all of the forms within that component against the business rules in Grants.gov and within NIH. So it's got a lot going on there, you might see the spinner for a little bit, but then you're going to get your list of errors and warnings.

As is the case with single project applications, errors will stop application processing and must be corrected and warnings do not stop application and are corrected at the discretion of the applicant. And we do have the avoiding common errors page. It's the same one we use for single projects and I do encourage you to look there, because it's really talking about content when you are looking at errors more than the format of your application. Okay?

Next let's take a peek at the previewing of a component. So I'm back up in that action section again. I hit that preview current component. And it gives me a picture of the data that's been entered to that component. And you will notice this doesn't have all of the bookmarks and all of the summaries and things that we will see later when we look at the preview of the application, but it does give you a single document with all of the information from the component.

Now let's look at changing the status of a component. So once I've filled out all of my data and I'm happy with it and I think that it's ready to go and I want to tell the applicant organization that it's ready to go, I can update the component status. Again, up in that action section, hitting the update component status button, and I'm presented with the statuses that I'm allowed to change that component to. In this case I'm going to mark it complete. But if you notice there, it's a little bit small, you can also mark it abandon. And this is how you would abandon a component. Okay?

So I'm going to mark it complete in my example. And then when you look at the component information in the summary page, you will see that that status is changed.

>> All right. I think we have another question to see if folks are paying attention. Okay. How does the project lead on a data entry form component indicate the component is complete and ready for incorporation into the application? Do they tell the PI, update the component status in ASSIST to mark it as complete? Or do they wait for somebody to ask them if they're finished? Okay. As you are looking at that, we'll show you those results. Okay. Only one percent of you would tell the PI and the 99% of you were listening to Sheri and know that you would update the component status in ASSIST to be complete.

>> That's a little bit of a cheat.

>> One percent of you are just trying to be funny.

>> It's a little bit of a cheat, it's right here on the screen [Laughter].

>> I know. Okay.

>> All righty. So once a component is marked complete, then it actually is stopping the ability to edit that component. So if you need to go back and make changes, it can be moved back to a work in progress status. But you have to have it in work in progress to edit. So that's one of the things if you are working in ASSIST and you get into the except and you are wondering where's that edit button, it's not going to show if it's not in a work in progress status.

>> Hey, Sheri, can you unabandon a component.

>> Yes, you can.

>> So you can resurrect it?

>> Yes, you can.

>> Okay, Deborah Kathleen, you got that?

>> All right. Any other questions about preparing your application? Actually, about data entry. We're going to talk about preparing your application next.

>> Oh, yeah, about data entry, we've got lots. Okay. So one thing to be -- to clarify is that, yes, we will still be requiring attachments to be PDFs.

>> Absolutely.

>> I don't know if you have a screen shot showing how you attach a PDF, but it will be very similar to what you do now, you will click on the button that says attach PDF.

>> You will do the browse, it's pretty standard.

>> What if a subawardee is involved in multiple components? Do you

include them in each individual subcomponent?

>> So you are going to want to include them wherever they are doing the work.

>> Okay.

>> What do you need to do if a key personnel will be giving effort but is not asking salary, benefits. Okay. Again we're trying not to get into the policy questions here because we're not the right people to answer the policy questions.

>> On that one from ASSIST perspective, the system can handle zeros.

>> Okay.

>> Let's see. A lot of people are asking when you lock a form, what happens if you walk away from your computer and you forget? Like at some point does it automatically

unlock?

>> Yeah. So there is actually a timeout value within ASSIST. I believe it's 45 minutes. So if you have inactivity it's going to kick you out of the system and when it does that, it would actually release your lock as well.

>> What happens if I'm a Signing Official or authority over the whole application, can I retrieve the lock if I want to?

>> No.

>> Okay. And so that means if it's 4:59, somebody has part of my application locked on the deadline day, then I would have to submit that application without that component?

>> So remember the only way they can have that lock is if it was in an edit mode and work in progress. Hopefully right before the deadline, you're not

in a state where you are in a work in progress.

>> That's right. Because everybody knows that they should try to submit early to make sure that everything goes through.

>> Right.

>> What about the senior/key part of the budget form? Does it auto complete from what was entered in the senior/key section?

>> It does not pull in the senior/key people from the senior/key person form if that's what they are meaning because it's not necessarily a one to one.

>> Okay. With regards to the site data, are you able to change the primary performance sites and its respective DUNS? Are you able to change the primary performance site? Yes. In the DUNS, yes.

>> This is like a pop quiz for you, isn't it?

>> It is [Laughter].

>> Let's see ... time out. Yes, okay. If an investigator is added to the application later removed do they retain their access or is that access automatically revoked?

I wonder if we have tested that.

>> If they were designated as the project lead in the PD/PI information, then that automatic access would be revoked. If you've manually given it to them, you need to manually take it away.

>> All right. Let's see. You know, we keep on getting questions about whether or not the session is being recorded for repeat viewing and yes, it is indeed and so if you have to drop off or if you joined late, it will be available after the fact. We

will be posting it.

Can you identify the person who has the application form locked?

>> No. If you try to grab -- if you try to edit and somebody already has it, it will just say it's in use by another user. We have been asked to identify that user and we're trying to work with our security people to see if that's something that we can add.

>> Okay. If you are auto logged off, are the changes saved automatically first?

>> No. You are going to want to save.

>> You know, here's a question that's asking can multiple people work on the proposal at the same time. And Diane, this is actually what we've been talking about, about locking and unlocking different form components. Because that allows you to work on the

same component at the same time, but not on the same exact form.

>> Exactly.

>> At the same time.

>> Yep.

>> Okay.

>> Even when somebody has the lock on the form, you can still view it. You just can't edit it.

>> Is it possible to give a subawardee access to the subaward component in ASSIST?

>> They must have access to the component itself to work on the subaward.

>> So that would have to be a decision of what the institution would like to do.

>> Absolutely, absolutely.

>> Okay. Again, I know that Sheri had mentioned some changes in system updates in April. If you have an

application in progress at that time, don't worry about it. Those changes do not affect your application. So there's no concern there.

>> Absolutely.

>> Okay.

>> It's a good thing.

>> [Laughter]. All right. Lisa is saying you know that 45 minute lock is a long time if we're trying to submit. But again you should have already -- they can lock down their application before submission time so nobody else can touch it at some point?

>> So you -- again, if it's in work in progress, that's the only time that you can get your lock. Okay? So it takes some time to actually incorporate all of your components and we're going to walk through those steps, so you really want to be doing

that in advance of your submission deadline.

>> So you want each one of those components need to be finalized and then nobody is going to be able to touch those components.

>> Exactly.

>> Is there a limit on the number of people that can be working on an application in the same time, even though they are in different sections of the application?

>> No, no.

>> Great. Budget question. I tried a test proposal and I wasn't sure it was doing all of the calculation, it seemed that I needed to calculate indirect costs myself for each component. Did I miss something?

>> So we're talking about, I don't have the actual form in front of me,

but the indirect cost is like one of those for something in there in the form. I do believe that you need to do the calculation, there's a little popup that comes up for indirect costs, all of those are manual entry.

>> Okay.

>> Yes.

>> Okay. And will ASSIST prepare a consolidated budget summary based on all of the individual components?

>> Absolutely.

>> Yes. So that it will do for you.

>> And if you were one of our testers, we have actually corrected the budget summary calculation, so if you are wondering if there was an issue there, we actually have identified and corrected that.

>> All right. I think we should go ahead and keep working.

>> Great.

>> All righty. Let's talk about submitting your application. So just like single projects, on time submission means error-free submission made by 5:00 p.m. local time of the submitting organization. Can't stress enough, submit early. That's days, not minutes. You want to make sure that you have time to address any unforeseen issues and also to view your application image in Commons. Only a Signing Official for the lead organization who has an authorized organization representative AOR active account with Grants.gov can submit the application. The application has to be in a ready for submission status. And you'll have that submit application button. Hit the button and you will be prompted to make sure that you really want to submit, you

click submit. And then you will be prompted for Grants.gov credentials. And this actually does go to Grants.gov and verify that it is valid credentials.

>> All right. So -- are you finished with the slide yet, Sheri?

>> Sure.

>>> All right. Let's just do a check. DeRon, are you ready here? So what Reg stlaitions do you need in order to submit the application. Warning, this may be a little bit of a trick question. A Commons PI, Commons Signing Official, Grants.gov authorized organizational official, project lead of a component or all of the above?

Let me give you a minute to think about that to make sure you don't get tripped up. All right. Let's see what the answers are. Okay. 20% say you need a Signing Official, 50 speakers say you need a Grants.gov authorized organizational official, 29% say you need all of the above. Sheri, do you want to explain this one?

>> So it's the all of the above that wins, we talked about having the ability to submit is restricted to having a signing official account and an AOR accident. But if you recall we actually do do a validation of your application before you submit. One of the things that we're checking for is that all of the PD/PIs, the ones on the overall that have that PD/PI role and your project leads on each component also have a credential. And you'll have an error that won't allow you to submit if you don't have those. So you really need all of the above.

>> Okay. Good answer, thank you.

>> All right. So we're submitting our application, we hit enter. And then you are going to get this lovely message on the top that says the application has been sent to Grants.gov and email notifications will be sent. Okay?

That's pretty much submitting to Grants.gov, not much to that. Prompt it and put it in. In the interest of time I think we may be [webinar sound jumps ahead].

Let's talk about tracking your application, this is one of the exciting things about ASSIST, one of the features that we think is a great improvement over our current two-system process. This is a slide that I alluded to before about notifications, there are plenty of notifications that go out. In fact

I'm pretty confident that you all are going to come back and say too much, too much, too much. We have notifications that go out when application is grant -- access is granted, when the except or application status is updated, when the submission status is updated and many, many more and there's a link there that I do encourage you to go to and give us feedback on whether you think that is too much or too little.

ASSIST does provide the ability to track both Grants.gov and NIH status. In the future, ASSIST will also provide a link to the Commons detailed status information to view your application image, but for now you will actually have to go to Commons and view your image there, but it is a soon to be new feature.

So again we're going to look at

application information, so we need to be on that application information screen, which you can get to from the bread crumbs at the top. You can see on the screen there in the middle this is in a submitted status and now I have a link next to that which says view submission status details and I can click that link. Now, in order to actually poll those NIH and Grants.gov for status, you do have to physically click this little check for status updates button. So you have to click that. And we will give you feedback on whether or not there's been a change of status. In this case it says there are no new updates to processing status. But what I have received before was that it was in a submitted state in ASSIST, we knew that, we hit the submit button and in Grants.gov it was validated.

When I hit that button again, I did have a status update. In this case now it's submitted in ASSIST, my agency tracking number is assigned in Grants.gov and it's actually processed at the agency side and that's great news. If you had an issue, you would have stopped at -- at received by agency in Grants.gov and e submission errors in the agency, okay, so really quickly you can get a feel for whether or not your application is going through all of the processes. To view your application as we indicated you do need to still go to Commons, you would log into Commons, you would go to the status screen, this would be the same folks that can do the viewing of applications today, that's your PD/PI, your multi-PDF and your SOs and AOs can get in and look at status.

You are going to recent pending e submissions, this happens to be an SO. In this case I put in the Grants.gov tracking number that I got from that tracking screen. Hit search. Get your hit list. Pending verification indicates that there is an image to look at. I can click on the application ID. That's going to bring me to the detailed status screen. Again, this is the same process as we used for single projects, so hopefully many of you are already familiar with it. In that detailed status screen, you look at the other relevant document section that e application at the top is your application image, that is what's going to go to review. If I had a cover letter on my application, that would also show there. And your appendices are going to show you.

Unlike single projects, this is actually a link to appendices because you will have lots of folders that have appendices. You will can have up to 10 appendices with each component for a multi-project application. As with a single project, it is your responsibility to carefully review the entire application and make sure that it's been processed correctly. And again there shouldn't be any surprises because you were able to preview your image and we are using the exact same code to do both. This is a little bit busy here, but I did want to throw on to the screen some of the data summaries that you would see in the image. We have one for project performance sites, one for human subjects, clinical trials, stem cells, vertebrate animal summaries, a senior/key person summary and following that senior/key person summary you would put all of those biosketches starting with the PD/PIs and then alphabetically. And then also we have multiple budget summaries and the one showing there is a composite application summary. Just like with single projects, we have an application viewing window. It is two business days, consistent with our other applications. SOs have the ability to reject an application within that viewing window and submit a change corrected application prior to the due date. No changes should be made after the due date.

And the reject the application link is available as it is with single projects, in Commons.

If no action is taken to reject the

application during the two business day viewing window, the application automatically moves forward to NIH for further processing. Questions about tracking your submission status?

Well, we have a polling question, I believe, too.

>> Okay. Here's a polling question. Can you correct warnings after the due date? Yes, no, or I don't know. Here's a hint it hasn't actually changed from the time the -- from the single project applications when working in ASSIST.

Okay. So here we go. Here's the answers. The answer is yes -- no. [Laughter]. No.

>> No.

>> The answer is distinctly no. Of although the system does allow you to correct a warning after the due date.

Your application will be considered late and so we advise strongly against doing that because unless you have a reason that fits under the late policy, your application will be rejected for that round.

>> Absolutely. Okay. Some final thoughts. Don't be a repeat clicker. Some of the actions within ASSIST are going to take a little bit of time and you want to make sure that you just let it complete the service. Some of the actions that you want to be careful with are validating and previewing. Again it's going to take a little bit of time, be patient and they will come through for you.

And ASSIST is a new system and it's likely that we're going to have a few bumps, hopefully they will be small but I would love to say that I have built you a perfect system, but we know from too many experiences that there are going to be some bumps, that's why we're in pilot. We do want your feedback. We need you to tell us about it. If you run into something and you can't figure it out and you just don't know where to turn, call the help desk. You know, we're going to work through it together. You know, it's not a time to panic.

So looking for assistance. We talked a little bit in the very beginning about the little question marks that are throughout the system. If you click on those question marks you will be brought to some really nice help files that I invite you to check out. It brings it up in a new window, you can actually jump to other areas or it's going to bring you directly to the place where you've -- for context that you wanted to be. So in this case I was on the senior/key person profile form, so it's brought me to the help for senior/key person profile. And it also gives you a direct link to the application Guide for the senior/key person profile form. To give you additional guidance on how to fill automatic those data fields.

There's also a search feature in the upper right-hand corner that will allow you to search through all of the help documentation.

Here are some links to self -- resources, we have an online help which we just talked about. We have the website for multi-project applications to talk about applying electronically that Megan's team manages. I have done an annotated form set that's a resource there that can kind of give you some direction for how to fill out some of the fields for multi-project applications. And although we've worked we closely with Grants.gov on the development of this system, it is developed and managed by NIH. So your first stop for support really should be NIH. So we encourage you to call the eRA Commons help desk first if you run into any problems.

If you run into a system issue that threatens your on time submission, our standard system issue policy is in place and you want to make sure that you follow that. It really entails calling the help desk, making sure that we have documented your issue by the deadline and that we're working through that with you. ASSIST is in pilot. We really, really want your feedback. We encourage you to take advantage of the online ticketing system of the help desk. The link is there for you and some guidance on how to identify it as feedback. We would love for you to take this route. It will allow us to make sure that we can record all of your feedback and that we can track it. And that's it.

>> All right. Sheri, let's get to some final questions here. Will ASSIST error checking catch all of the errors found in the NIH Commons?

>> I'm only hesitating here because there is a potential that after you submit you could still run into a problem. We actually haven't identified any in our testing. [Laughter].

>> But we're not confident enough to say 100% that you won't.

>> Really the types of problems that we get after submission are things that we are trying to put your

data into our database. That's not really something that we can check before the fact. We've tried to put as many checks to make sure it's all properly formatted and everything is in place beforehand, but it is going through that whole validation process again after the fact and it is going to, you know, make sure that we can record your data for future use by NIH.

>> So the answer is really yes, we're checking for all of the errors that will be found in the NIH Commons, but that still means that you need to go through and make sure that your application made it through successfully.

>> Right. One good example for that is there is an error if you have submitted a second time without marking it change corrected. So

that's one that you may get a duplicate error that would not be caught up front.

>> There is a question here about how they mark a change corrected application.

>> That's going to be the same process as you would use for single project. There is a field on the R and R cover on the overall that you would marked as change corrected.

>> Okay. But you go into your application that you have already submitted. It's going to look in a sense as if it's already been submitted and then you are going to go and mark change corrected and make a change and then submit it again.

>> That's correct. So you will have to go back and change the status as to work in progress to be allowed to edit and go through those, yes.

>> Uh-huh.

>> Is there a demo site for ASSIST? A lot of people are looking for a test space to play with the system.

>> So I have been able to get some user acceptance testers into our user acceptance test environment, but I have not been able to do that yet in a way that I can open up to just anybody. Because we do do manually creating IDs and things like that. We are working actively on making that available. We're hoping we'll be able to leverage some of the Commons demo stuff that we have in place already. But we don't yet have a time line on when that will be available to folks.

>> Okay. If I initiate an application in a very preliminary way, should I be putting the type of submission as preapplication?

>> No, preapplication is very specific to only a single activity code, only a single project activity code in NIH, so you want to just make it an application and keep going.

>> Okay. Are we still going to have the same issues with file names in terms of spaces and special characters?

>> Yes, Grants.gov is enforcing some stricter guidelines on file names. That is part of the PDF guidelines in the avoiding common errors link that we had shown previously that we encourage you to go back and take a peek at that. But that is actually checked up front so you shouldn't get the error from Grants.gov, you should get it from ASSIST if you have not complied.

>> Let's see. I think there's still a remaining confusion about

locking forms versus locking components.

>> So we really don't have the concept of locking a component. You are locking a form within a component.

>> And so that form gets locked just because somebody is using it and we don't want two people to be able to overwrite what they are doing.

>> That's correct is that so it will automatically kind of unlock when they are out of that form.

>> When you do that save and release lock at the bottom of the form, that will release it.

>> Right.

>> Or it could do the timeout.

>> That's different than finalizing a component.

>> Absolutely.

>> Which is the equivalent of locking a component down for the

people that you are given access to that?

>> Finalizing would make it so you could no longer edit that and only certain privileges will allow you to be able to put it back into the work in progress. We will have all of that posted on the website and the privileges and what that gives you in ASSIST.

>> Wonderful. We have more questions here that, you know, we'll turn them into FAQs because some of them are common questions. It will be a learning process for all of us. We will be posting this on our website and you will be able to find it again in three to five business days. Thank you for joining us. I know this was a lot of information. Your time is valuable. I hope this has been worth the effort. The PowerPoint

slides are already up there and the eRA help desk will be available for questions. A few of you have asked why we don't have a dedicated ASSIST help desk and that's because we have been training our eRA commons help desk to handle all of these questions.

Okay?

And with that, thank you so much for attending.

>> Take care.

>> This concludes today's webinar.