Quick Start: Preparing Your Single-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
  o https://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-16-160)
• The ‘Apply Online Using ASSIST’ button just above the FOA Table of Contents takes you to ASSIST

Step 2: Make a submission plan
• Decide who will be responsible for data entry in ASSIST and gather their eRA Commons usernames

Step 3: Login to ASSIST & Initiate Your Application
• Login to ASSIST at https://public.era.nih.gov/assist using your eRA Commons username and password
• Use the Initiate Application feature and your FOA number to get started on your application
  o Or, access applications already in progress using the Search feature

Step 4: Provide application access to your team
• Automatic Edit access is given to:
  o All SOs (Signing Official) and AOs (Administrative Officials) at the applicant organization
  o The PD/PIs designated on the application (once eRA Commons username is entered in Credential field)
  o The user that initiated the application
• Access can be given (or revoked) to additional users using the Manage Access action

Step 5: Enter Application Data
• Use the tabs across the top of the screen to move between forms
• Complete the R&R Cover tab first
• Multiple users can simultaneously work on your application, but only one user at a time can Edit an individual form
• Use the Validate Application action 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 Submission Status action to change your application from Work In Progress status to Ready for Submission status
  o If additional edits are needed, the application must be returned to Work In Progress status

Step 7: Submit your application
• Use the Submit button on the Summary tab to submit to the agency through Grants.gov
  o Only active for users logged into ASSIST with an eRA Commons account with the SO role
• Provide your valid Grants.gov Authorized Organizational Representative 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
  o If your application successfully processed through to eRA Commons, the Agency Tracking # (e.g., AN1234567) will be hyperlinked to the eRA Commons detailed status screen
  o Carefully check your assembled application image (e-Application) and associated documents in the Other Relevant Documents section of the screen

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ASSIST: Single-project Applications
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#### Navigating the ASSIST Screen

- **Available actions vary based on application context and user access**
- **Some actions are only available from the Summary tab (e.g., Preview Application)**

### ASSIST Action Notes

| **Manage Access** | Provides interface to control who has access to your application and what they can do within the system  
| o Access can be controlled across multiple variables: 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, unless delegated  
| o SOs (Signing Officials) can delegate Access Maintainer and Status Maintainer authority to other users |
| **Add Optional Form** | Allows you to add additional forms to your application (e.g., Modular Budget, R&R Budget, Subaward Budget, PHS Inclusion Enrollment Report, PHS Assignment Request Form) when your application circumstances warrant them  
| o Available forms vary by Funding Opportunity Announcement |
| **Preview Application** | Provides a preview of your application in the format used by the agency for review and funding consideration  
| o Cover Letter, PHS Assignment Request Form and Appendices are not part of the application image (maintained separately) |
| **Validate Application** | Checks your application data against agency business rules prior to submission  
| o Form fields marked with an ‘*’ must be completed before the system can validate that form |
| **View Status History** | Provides history of submission status updates related to ASSIST actions |
| **Update Submission Status** | Allows you to change your submission status to **Work In Progress**, **Ready for Submission** or **Abandoned**  
| o Your application must be error-free for the status to change from **Work In Progress** to **Ready for Submission**  
| o 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  
| o Application must be in **Ready for Submission** status  
| o Available to users with the SO (Signing Official) role on their eRA Commons account  
| o Requires active Grants.gov Authorized Organizational Representative credentials |
| **Copy Application** | Copies application data to a new application  
| o If copying to a different FOA, a ‘best effort’ match is done |
| **Delete Application** | Permanently deletes an application from ASSIST – use cautiously, once it’s gone – it’s gone! |