A program of the National Institutes of Health

Substance Abuse and Mental Health Services Administration (SAMHSA)

Funding Opportunity Announcement (FOA) Applicant Webinar

A program of the National Institutes of Health

Contents

- **Contents:**

Four (4) Required Registrations

Applicants MUST Complete Four Registrations

There are four (4) separate registrations that MUST be completed for all applicants to apply to a SAMHSA grant.

1) Dun and Bradstreet Number (DUNS)
2) System for Award Management (SAM)
3) Grants.gov
4) eRA Commons

DUNS and SAM Registrations

1. **Dun and Bradstreet Universal Numbering System (DUNS)**
   - http://www.dnb.com or call 1-866-705-5711
2. **System for Award Management (SAM)**
   - https://www.sam.gov
   - New registration procedures explained on website
   - Must be updated every 12 months and remain active during project period if awarded a grant

Grants.gov Registration

3. Grants.gov

- Must complete DUNS and SAM registrations prior to starting process of registering in grants.gov
- http://www.grants.gov/web/grants/register.html.
- The person submitting your application must be properly registered with grants.gov as the Authorized Organization Representative (AOR) for the specific DUNS number cited on the SF-424 (first page).

eRA Commons Registration

4. eRA Commons

- The organization MUST register in eRA Commons to submit a grant application.
  - https://era.nih.gov/reg_accounts/register_commons.cfm
- It is strongly recommended that you start the eRA Commons registration process **at least six (6) weeks** prior to the application due date.

eRA Commons Accounts

- Once your accounts are created they will receive an eRA Commons ID and can access eRA Commons. Accounts with the SO role can access the electronic application once submitted, receive notifications on application status, and other relevant application/grant information in eRA.
  - SO accounts will be able to access information about ALL applications from their organization.
- PD accounts with the PI role will be able to access the electronic application submission, receive notifications on application status, and other relevant information ONLY FOR APPLICATIONS IN WHICH THEY ARE LISTED AS THE PROJECT DIRECTOR.

Two (2) eRA Commons Roles Required to Submit Applications

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SO = SAMHSA Business Official (BO)

One account with the SO role is created as part of your organization registration. The person with this role may create other accounts for the organization. There can be more than one SO account for your organization. Additional SO accounts can only be created by another SO.

If you are submitting your application through eRA ASSIST, the BO listed on the SF424 section 21. *AUTHORIZED REPRESENTATIVE* must have the SO role in Commons.

PI = SAMHSA Project Director (PD)

There must be at least one PD account for the application. More than one PD/PI account may be affiliated with the organization. Creating PD accounts is covered in more detail later in the presentation.

The SAMHSA Project Director listed on the application must have an account with the PD/PI role in eRA Commons.

The eRA Commons Username of your SAMHSA Project Director is entered in #4 Applicant Identifier on the SF424.

Registering an Organization in eRA Commons

eRA Commons Registration Process Overview

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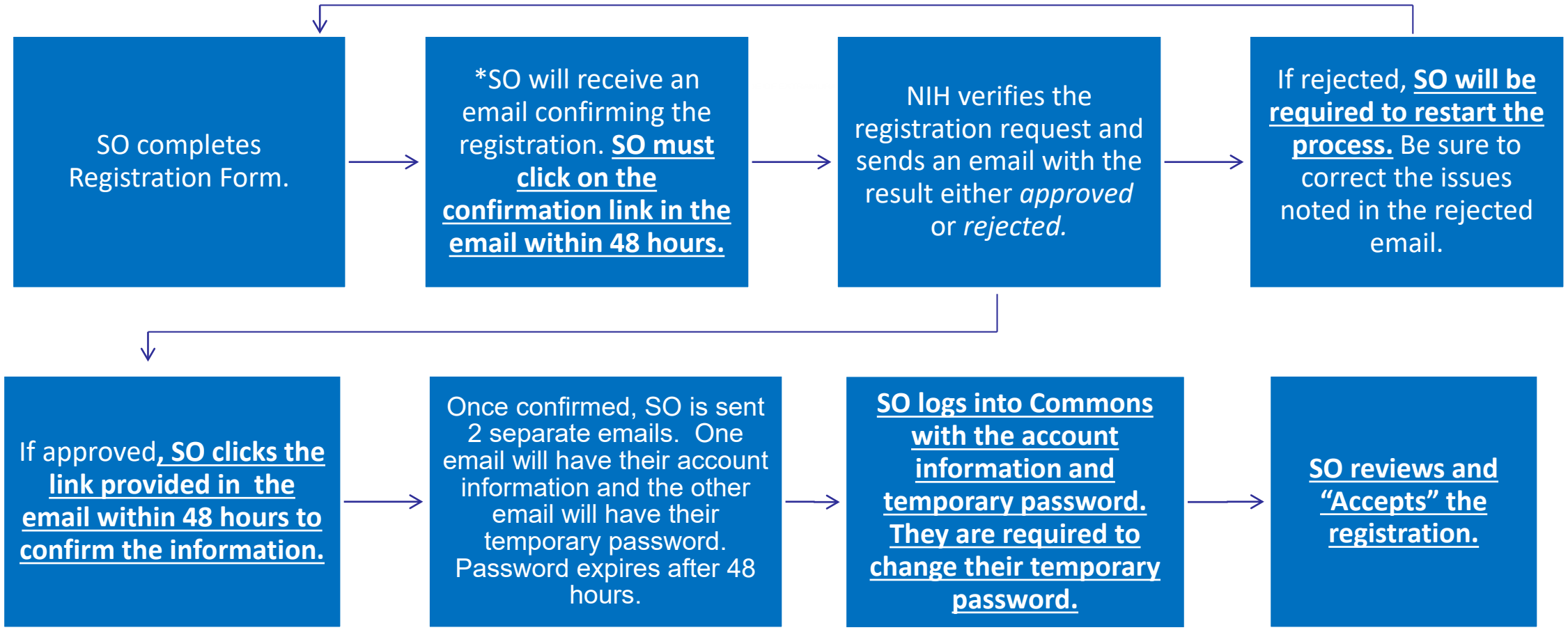
- The SO registering the organization MUST regularly check their email during this process and take action as noted in the emails.
  - Check your SPAM folder if you do not receive the emails.



Accessing the eRA Registration Form

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https://public.era.nih.gov/commons/public/login.do?TYPE=33554433&REAL

Commons Login

File Edit View Favorites Tools Help

Commons
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Contact Us | Help

Commons Login

*Required field(s)

*Username

*Password

Login Reset

(For External Users Only)

(For External Users)
Forgot Password/Unlock Account?

Federated Institutions/Organizations

Select.. Sign in

Federal User Login Here

Welcome to the Commons

System Notification Message

All systems are currently available.
Note: Commons and IAR will be unavailable from 9 p.m. (ET) Saturday, July 14, until 5 a.m. (ET) Sunday, July 15, 2018 for scheduled monthly maintenance. We are sorry for any inconvenience.

Note: Effective March 22, 2018: If you are registering a new entity in SAM.gov, you must provide an original, signed notarized letter stating that you are the authorized Entity Administrator before your registration will be activated. Read FAQs to learn more about this process change.

Scheduled Commons Maintenance: For maintenance information, see the eRA Scheduled Maintenance Calendar.

Support Related Resources

- **Electronic Submission:** Learn about the most frequent application errors at Avoiding Common Errors.
- **Electronic Application Submission:** To learn about completing and submitting an electronic application and access helpful resources, visit the Applying Electronically website.
- **eRA Home Page:** To find Commons FAQs, User Guides, training materials, and step-by-step instructions for performing tasks in Commons, visit the eRA website.

Commons Related Resources

Register Grantee Organization

About the Commons

- Frequently Asked Questions
- Latest Release Notes

Additional Links

- RePORT
- Grants.gov
- iEdison
- National Institutes of Health
- Public Access Policy Page
- Loan Repayment Program
- Commons Quick Queries

Accessing the eRA Registration Form

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https://public.era.nih.gov/commons/public/registration/registrationInstructi

Commons Login | Commons Home Page

File Edit View Favorites Tools Help

U.S. Department of Health & Human Services www.hhs.gov

Commons
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Welcome:
Institution: Not Affiliated
Roles:
Contact Us | Help

Home eRA Partners

Online Registration

Only Signing Officials can register their institutions with the NIH. Follow these directions to register your institution.

1. Complete the online Institution Registration Form and click Submit.
2. Agency will send you an email with the link to confirm your email address.
3. Once email address is verified, the Agency will review your request and let you know of the result via email.
4. If your request is denied, you will get an email notifying you of the reason.
5. If your Request is approved, you will get an email with your Commons user id and temporary password.
6. Log in to Commons with temporary password and system will prompt you to change temporary password to the permanent one. Principle Signing Official will be prompted to electronically sign your registration request. (Please review your registration information carefully).
7. Once Principle Signing Official has electronically signed the request, your organization will be active in Commons and you may Create and maintain additional accounts for your institution staff.

Register Now

https://commons.era.nih.gov/commons/

eRA Registration Form part 1 of 2

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https://public.era.nih.gov/commons/public/detailReg.do

Commons Login | Commons Home Page

File Edit View Favorites Tools Help

U.S. Department of Health & Human Services — www.hhs.gov

Commons
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Welcome:
Institution: Not Affiliated
Roles:
Contact Us | Help

Home | eRA Partners

Register Institution

Online Registration

Welcome to the ERA Commons On-Line Registration Process.

Completing this process will register your institution into the ERA Commons and establish up to two accounts for your institution. Selected staff at your institution can then create additional accounts appropriate to the needs of your institution.

Before registering your institution please read through the registration material provided here. It is recommended that you print a copy of this page to use as a reference when completing the form. To print a copy select the "Print" button on your browser button bar or select "File/Print" from the menu bar.

* indicates required field

Registration Purpose

Select the type(s) of opportunities to which your organization will apply (check one or more options below): *

- ☐ My organization wishes to apply for NIH Grants/Contracts
- ☐ My organization wishes to apply for Non-NIH Grants/Contracts
- ☐ My organization wishes to apply for NIH Other Transaction Authority (OTA) opportunities

Institution Information

Please begin by entering your 9-digit DUNS (plus 4-digit extension if applicable) and click "Verify DUNS".

DUNS Number:*	Verify DUNS	**Closeout E-mail:***	
Institution Name:*		**NoA E-mail:***	
Street 1:*		**City:***	
Street 2:		**State***	
Street 3:		**Zip Code:***	(20873) or (208733423)
Street 4:		**Country:**	UNITED STATES

https://commons.era.nih.gov/commons/

You must verify your DUNS number before entering institution information

eRA Registration Form part 2 of 2

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https://public.era.nih.gov/commons/public/detailReg.do

Commons Login | Commons Home Page

File Edit View Favorites Tools Help

Street 1 :*
Street 2:
Street 3:
Street 4:

City :*
State *
Zip Code :* (20873) or (208733423)
Country: UNITED STATES

Accounts Information

Principal Signing Official

Name Prefix:
First Name :*
Middle Name:
Last Name :*
Title :*
User Name :*
Phone :*
Fax :
E-mail :*

Accounts Administrator

This entire section is optional; however if any information is entered then all required fields must be entered

Name Prefix:
First Name :*
Middle Name:
Last Name :*
Title :*
User Name :*
Phone :*
Fax :
E-mail :*

Save | Reset | Cancel

[Privacy Act Statement | Accessibility | Disclaimer]

National Institutes of Health (NIH)
9000 Rockville Pike
Bethesda, Maryland 20892

Department of Health and Human Services

GRANTS.GOV™ FIND. APPLY. SUCCEED.™

Entering an Accounts Administrator is optional

Click Save which will generate a confirmation email that will be sent to the Signing Official email address

eRA Registration Confirmation Email

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Email confirmation for TEST ORGANIZATION Inbox x

era-notify-test@mail.nih.gov Jul 6 (5 days ago)

to me

Your registration request has been received. The next step is for the NIH to verify this email address, which we have recorded for the Signing Official of your institution. Please click on the email link below to confirm this information.

http://public.test.era.nih.gov/commons/public/verifyEmail.do?r=346712

If you are unable to click on the above email link or have other concerns or questions, contact the NIH eRA Service Desk using the contact information listed below.

Thank you for registering your institution with the NIH eRA Commons.

For any further questions about this email, call the eRA Service Desk at 1-866-504-9552 or refer to http://grants.nih.gov/support for additional methods of contact. Please access Commons at http://public.era.nih.gov/commons/.
For more information please visit http://era.nih.gov/

Email Verification Message

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U.S. Department of Health & Human Services www.hhs.gov

Commons
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Welcome:
Institution: Not Affiliated
Roles:
Contact Us | Help

Home eRA Partners

Email Verified

The email for [TESTORGSO] has been verified.

NIH will review your application pending for approval. Once reviewed, you will receive another email stating the status of your application. Further instruction will be provided to complete the registration process.

[Privacy Act Statement | Accessibility | Disclaimer]

National Institutes of Health (NIH)
9000 Rockville Pike
Bethesda, Maryland 20892

Department of Health and Human Services

Screen Rendered: 07/05/2018 10:34:19 EDT
Screen Id:
Version: 3.36.2

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Email with Registration Status (Rejected)

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The NIH is unable to approve your institution registration request. Inbox x

era-notify-test@mail.nih.gov 1:24 PM (48 minutes ago)

to me

We are sorry, but we were unable to approve your registration request for your institution: TEST ORGANIZATION 123 on 2018-07-18 12:58:15.0. The reason for this is as follows:

Your NIH Commons registration request has been rejected for the following reason: 1. Did not supply a valid DUNS number. The DUNS entered on the registration ,000000000, is not a valid DUNS number. Please re-register again with a valid DUNS number. If you feel you can correct your specific issue please feel free to register again, at public.era.nih.gov/commons

If you have any questions or concerns concerning this email, contact the eRA Service Desk using the information provided below.

For any further questions about this email, call the eRA Service Desk at 1-866-504-9552 or refer to http://grants.nih.gov/support for additional methods of contact.
Please access Commons at http://public.era.nih.gov/commons/.
For more information please visit http://era.nih.gov/

Email with Registration Status (Approved)

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Your institution registration has been approved. Inbox x

era-notify-test@mail.nih.gov Jul 5 (6 days ago)

to me

The NIH has approved your registration request for TEST ORGANIZATION, requested date: 2018-07-05 10:33:04.0.

Click on the link below to confirm your registration.
http://public.test.era.nih.gov/commons/public/d.do?mode=c&r=346692

Following this confirmation, the initial Signing Official account will be sent to you by email. If you have any questions or concerns, contact the NIH eRA Service Desk using the information provided below.

For any further questions about this email, call the eRA Service Desk at 1-866-504-9552 or refer to http://grants.nih.gov/support for additional methods of contact. Please access Commons at http://public.era.nih.gov/commons/.
For more information please visit http://era.nih.gov/

Confirm Registration Information

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U.S. Department of Health & Human Services www.hhs.gov

Commons
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Welcome:
Institution: Not Affiliated
Roles:
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Home | eRA Partners

IPF Assignment View

NIH has approved your registration and linked your registration with NIH's database. Does the information below correctly match your institution?

Confirm Institution Registration

Registration Institution Name:	TEST ORGANIZATION
NIH Institution Name:	TEST ORGANIZATION
Request Date:	2018-07-05 10:33:04.0

yes no

[Privacy Act Statement | Accessibility | Disclaimer]

National Institutes of Health (NIH)
9000 Rockville Pike
Bethesda, Maryland 20892

Department of Health and Human Services

Screen Rendered: 07/11/2018 02:58:50 EDT
Screen Id:
Version: 3.36.4

GRANTS.GOV
FIND. APPLY. SUCCEED.

User Account Information Emails (1 of 2)

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eRA Commons: Notification of Authentication Credentials and New eRA Account Inbox x

era-notify-test@mail.nih.gov Jul 5 (6 days ago)

to me

*** This is an automated notification - Please do not reply to this message. ***

Signing Official,

An eRA account has been created for you on Jul 5, 2018. Your account details are:
- Account holder: Signing Official
- Username: TESTORGSO
- Organization: TEST ORGANIZATION
- System(s): Commons
- Role(s): SO/TEST ORGANIZATION;

Shortly, you will be receiving another email containing your password.

To access the system use the username and password provided in these emails.

For any further questions about this email, call the eRA Help Desk at 1-866-504-9552 or refer to http://grants.nih.gov/support for additional methods of contact. Please access Commons at http://public.era.nih.gov/commons/.
For more information please visit http://era.nih.gov/

User Account Information Emails (2 of 2)

A program of the National Institutes of Health

eRA Commons: Notification of Password for New Account Inbox x

era-notify-test@mail.nih.gov Jul 5 (6 days ago)

to me

*** This is an automated notification - Please do not reply to this message. ***

The password associated with your recently created account is [redacted]

The above password is temporary, and will expire in 48 hours. You will be required to change your password the first time you successfully log into the Commons before the temporary password expires. On the Change Password page, enter the temporary password in the Current Password field. Please read the instructions on the Change Password page carefully before selecting a new password.If the temporary password expires, you will be taken to the Reset Password page where you can request another temporary password.

To access the system use the Username provided in the email notifying you of your new account.

For any further questions about this email, call the eRA Help Desk at 1-866-504-9552 or refer to http://grants.nih.gov/support for additional methods of contact. Please access Commons at http://public.era.nih.gov/commons/.
For more information please visit http://era.nih.gov/

Your temporary password is only valid for **48 hours**. If you have issues with the temporary password, contact the service desk.

Log In With Temporary Password

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Commons
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Contact Us | Help

Commons Login

*Required field(s)

*Username

*Password

Login Reset

(For External Users Only)

(For External Users)
Forgot Password/Unlock Account?

Federated Institutions/Organizations

Select.. Sign in

Federal User Login Here

eRA Service Desk

Hours: Mon-Fri, 7AM-8PM EDT/EST

Welcome to the Commons

System Notification Message

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Support Related Resources

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- **Electronic Application Submission:** To learn about completing and submitting an electronic application and access helpful resources, visit the Applying Electronically website.
- **eRA Home Page:** To find Commons FAQs, User Guides, training materials, and step-by-step instructions for performing tasks in Commons, visit the eRA website.

Commons Related Resources

- **Reference Letters:** To submit a reference letter when requested by an applicant, please follow this link: Submit Reference Letter.
- **Demo Facility:** Demo Facility allows you to try most of the capabilities of the NIH eRA Commons in a sample environment.

Register Grantee Organization

About the Commons

- Frequently Asked Questions
- Latest Release Notes

Additional Links

- RePORT
- Grants.gov
- iEdison
- National Institutes of Health
- Public Access Policy Page
- Loan Repayment Program
- Commons Quick Queries

Change Your Password

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Change Password

WARNING!

Your password is temporary. You must change the password now in order to log into the system.

INFORMATION!

- The password length must be between 8-16 non-blank characters
- Must Contain a mixture of letters, numbers and Special characters: ` ~ ! @ # $ % * ^ ( ) - _ = + [ ] { } | \ ' : ; " < > , . ? /
- First and last characters cannot be numbers
- Cannot contain username
- Cannot be reused within one (1) year

Current Password:

••••••••

New Password:

••••••••••

Confirm New Password:

••••••••••

Submit Clear

Password Validation Results

- The password length must be between 8-16 non-blank characters
- Must Contain a mixture of letters, numbers and Special characters: ` ~ ! @ # $ % * ^ ( ) - _ = + [ ] { } | \ ' : ; " < > , . ? /
- First and last characters cannot be numbers
- Cannot contain username
- New Password cannot be the same as Current Password
- Confirm Password should be the same as Password

Access Commons

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U.S. Department of Health & Human Services | NIH National Institutes of Health | Office of Extramural Research | Help | Contact Us

Electronic Research Administration
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Account Management System (AMS)

Change Password

SUCCESS!

Your password has been changed successfully.

Application Links:

- **Commons:** http://public.test.era.nih.gov/commons/
- **iEdison:** https://public.test.era.nih.gov/iedison/
- **Facts:** https://public.test.era.nih.gov/facts/sd

Click on the Commons application link to review and complete your registration.

red: 07/05/2018 12:28:34 EDT | AMS0001@1091 | Version: 2.11.11
Manage User Preferences | Accessibility | Disclaimer
utes of Health | U.S. Department of Health and Human Services |
NIH...Turning Discovery Into Health®

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Complete Registration

Registration Information

In order to protect the confidentiality of certain information, access to the secure eRA Commons server is limited to authorized users. The registration of authorized eRA Commons users will be administered by the Principal Signing Official, or their designee, serving as the grantee organization Commons Accounts Administrator.

The grantee organization Principal Signing Official serving as administrator of the Commons accounts, and signatory of this form, should be the Official with institutional authority in so far as legally binding grants administration actions with the NIH are concerned, including serving as the grantee organization authority responsible for submission of grant applications to the NIH. As Commons Accounts Administrator, this Official will have the authority to create, modify and delete Commons accounts for additional Signing Officials, Administrative Officials, Principal Investigators, Program Directors, and other scientific and/or administrative staff for the grantee organization.

Solely for the purpose of facilitating administration of Commons accounts, and distinct from submitting grant applications to the NIH, the Principal Signing Official can extend authority to a Primary Commons Accounts Administrator. Designation of such a Primary Commons Accounts Administrator can be acknowledged herein, as detailed below, so long as both Principal Signing Official and Primary Commons Accounts Administrator are signatories of this form.

Institution Information

Institution Name:	TEST ORGANIZATION		
FAX Received:	No	**Closeout E-mail:**	
Duns Number:	000000000	**NoA E-mail:**	
Street 1:	123 STREET	**City:**	BETHESDA
Street 2:		**State:**	MD
Street 3:		**Zip Code:**	20873
Street 4:		**Country:**	
IPF Code:			

Principal Signing Official		Accounts Administrator	
Name Prefix:		**Name Prefix:**	
First Name:	Signing	**First Name:**	
Middle Name:		**Middle Name:**	
Last Name:	Official	**Last Name:**	
Suffix:		**Suffix:**	
Title:	SO	**Title:**	
User Name:	TESTORGSO	**User Name:**	
Phone:	0123456789	**Phone:**	
Fax:		**Fax:**	
E-mail:		**E-mail:**	

By clicking the "Accept" button, you acknowledge responsibility for maintaining the security and confidentiality of the grantee organization's information through the administration of all Commons accounts established for the grantee organization.

Accept

Next Steps

- After “Accepting” your registration, the organization registration process with eRA Commons is complete.
- You may now make other accounts for your organization.
- **You MUST create/affiliate your Project Director’s (PD) Commons account (PI role) in order to apply to FOAs.**

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Creating a PD/PI Account in eRA Commons

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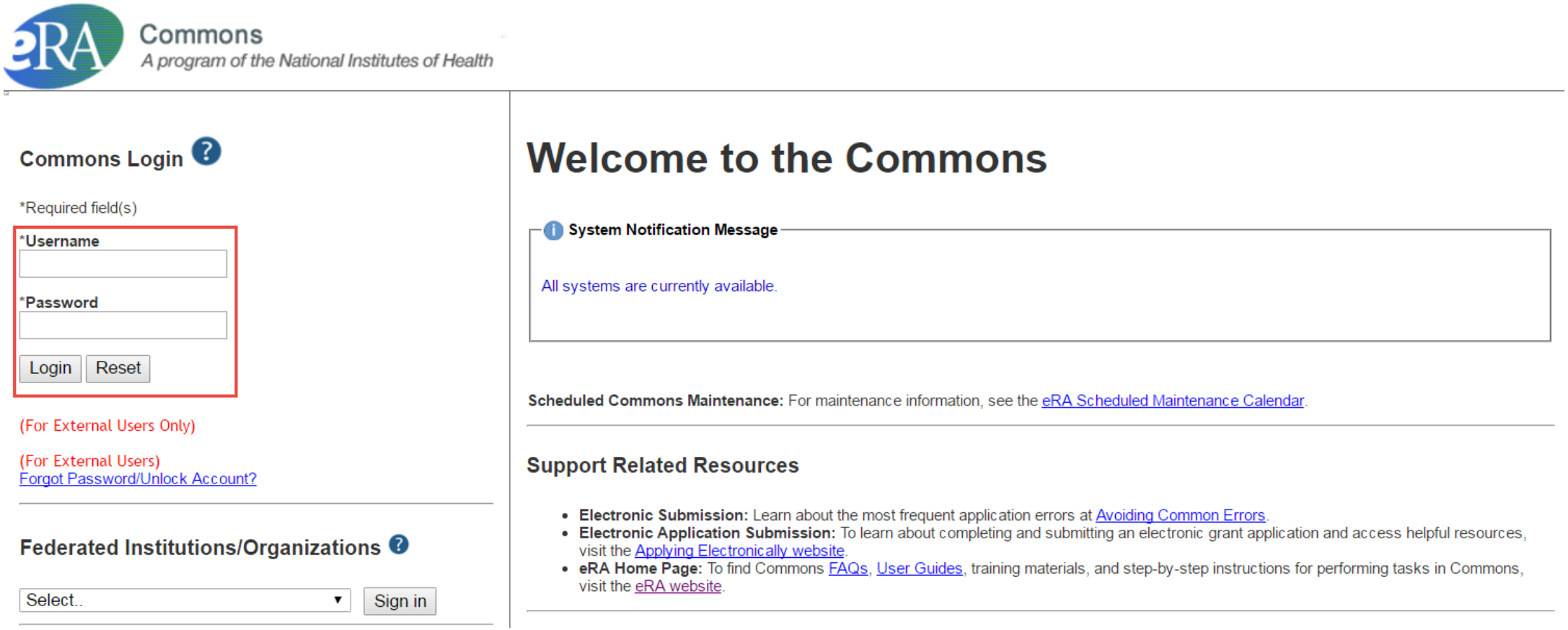
Key Information for Creating a PD Account

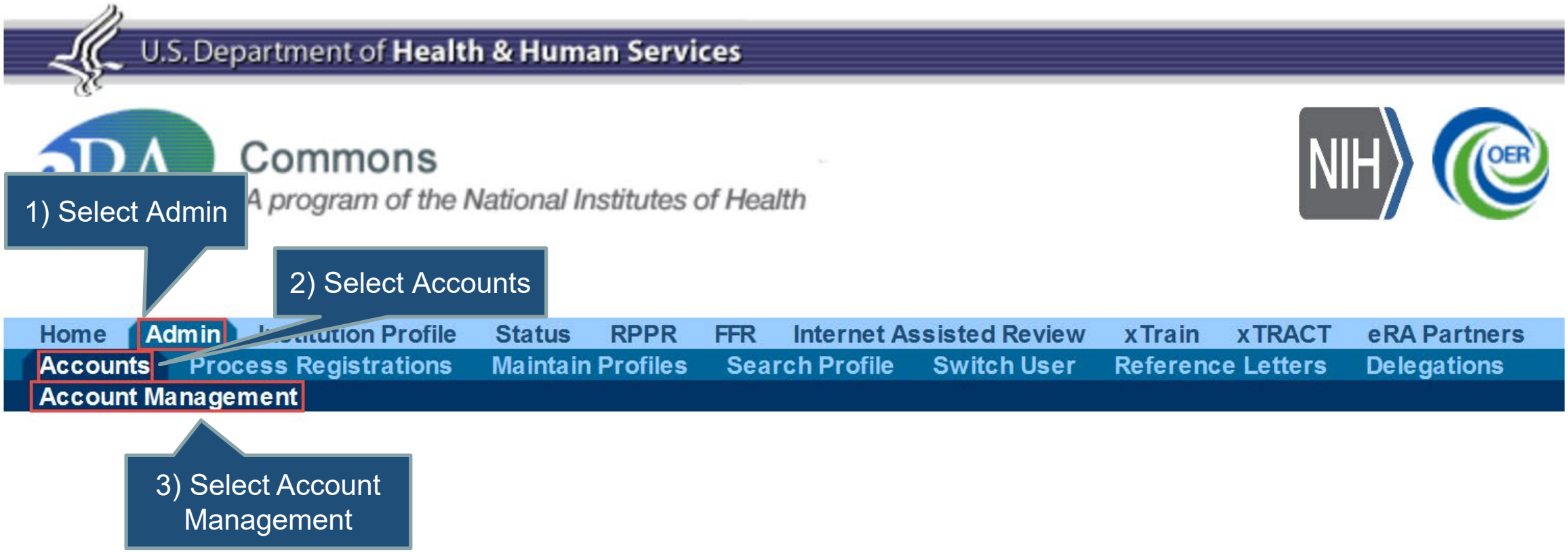
- A Project Director may already have an account. If they do, you should give them roles with your organization instead of creating a duplicate account.
- PD accounts need to have the PI role in eRA Commons.
- You will not be able to create a new account unless you first search for existing accounts.

SO: Log into the eRA Commons

- Navigate to eRA Commons at https://public.era.nih.gov/commons



SO: Navigate to Account Management



SO: Search for the PD

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Electronic Research Administration

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AMS

Manage Accounts

Ensure that the Commons displays as the User Type

Note: You can use % wild cards when conducting a search; for example, you could search for Chris% and the results will be provided for Chris and Christopher

Search Accounts

Search Criteria

NOTE! You must enter at least one search , besides User Type and Account Status.

User Type: Commons

Account Status: All

User ID

Last Name

First Name

Middle Name

Enter search criteria

Organization(s)

Email

Roles

Search

Clear

Back to top

SO: Review Search Results

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Click Manage to view more information

Search Accounts

Search Criteria

Search Results

Showing 1 - 4 of total 4

User ID	Name	Email	Account Status	Roles & Affiliations	Action
ENTERPRISE	Kirk, James	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University ... read more	Manage

Create New Account

Back to top

By clicking a name you are able to view a list of applications this person is affiliated with, as well as other information that may help you determine which account is applicable, if any

SO: Review Active Account

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Note: You could validate the User ID (i.e., ENTERPRISE) with the PD

Review the User Information, Contact Information, and Roles sections to determine if this is the PD account you are looking for

User Information

User Type

Commons

User ID

ENTERPRISE

Primary Organization

Monroe County Public Health Department

Contact Information

Last Name

Kirk

First Name

James

Middle Name

Email

eRATest@od.nih.gov

Confirm Email

eRATest@od.nih.gov

SO: Review Active Account (continued)

Review the list of organizations and determine if your organization is listed

Roles

+ Affiliate

Role(s)	Organization(s)
PI	ABC University
PI	DEF University
PI	GHI University

SO: Determine the Appropriate Scenario

Scenario 1	Scenario 2	Scenario 3
PD already has an account that is affiliated to the SO's organization	PD already has an account with the PI role that is NOT affiliated to the SO's organization	PD does NOT have an account
Next Steps: **No action required**	**Next Steps:** **Affiliate existing account**	**Next Steps:** **Create a new account**

Scenario 2 – Affiliating an Existing Account With The PI Role To Your Organization

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Scenario 2

SO: Affiliate Account to Organization

Click Manage

Search Accounts

Search Criteria

Search Results

Showi 1 - 4 of total 4

User ID	Name	Email	Account Status	Roles & Affiliations	Action
ENTERPRISE	Kirk, James	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University ... read more	Manage

Create New Account

Back to top

Scenario 2

SO: Affiliate Account to Organization

Roles

+ Affiliate

Select Affiliate under the Roles section

Role(s)	Organization(s)
PI	ABC University
PI	DEF University
PI	GHI University

Scenario 2

SO: Select PI Role

AMS | Add Roles

Organization

Starfleet Academy

Role(s) *(to multi-select, please use ctrl*

GRADUATE_STUDENT - Graduate S
PACR - Public Access Compliance
PI - Principal Investigator
POSTDOC - POSTDOC
PROJECT_PERSONNEL - Project Personnel
SCIENTIST - Scientist
SO - Signing Official
SPONSOR - Sponsor Users
TRAINEE - Trainee
UNDERGRADUATE - Undergraduate

Select PI – Principal Investigator from the dropdown menu

Select Add Role(s)

Close | Add Role(s)

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Scenario 2

SO: View and Save

Roles

+ Add Roles | ✖ Unaffiliate

View results

Showing 1 - 4 of total 4

Role(s)	Organization(s)	Action
PI	Starfleet Academy	✖ Remove
PI	ABC University	
PI	DEF University	
PI	GHI University	

Save | Cancel

Select Save

Scenario 3 – Creating a New PD Account

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Scenario 3

SO: Create new account

Note: If none of the accounts/profiles look correct, then create a new account

Search Accounts

Search Criteria

Search Results

Showing 1 - 4 of total 4

User ID	Name	Email	Account Status	Roles & Affiliations	Action
ENTERPRISE	Kirk, James	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University ... read more	Manage

Create New Account

Back to top

Select Create New Account

Scenario 3

SO: Complete Fields and Add Roles

Create Account

All fields are required unless they're marked *(Optional)*

User Information

User Type

Commons

User ID

Primary Organization

University of California San Diego

Contact Information

Last Name SZILAGYI

First Name moira

Middle Name *(Optional)*

Email

Confirm Email

Roles

+ Add Roles

Create Clear

Create a User ID (Make sure to let the PD know the User ID you assign)

You will need the PD email address, and to let the PD know to look for an email from the system

Select Add Roles

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Scenario 3

SO: Select PI Role

Select PI – Principal Investigator Role

AMS | Add Roles

Organization

Starfleet Academy

Role(s) *(to multi-select, please use ctrl or shift keys)*

GRADUATE_STUDENT - Graduate Student
PI - Principal Investigator
POSTDOC - POSTDOC
PROJECT_PERSONNEL - Project Personnel
SCIENTIST - Scientist
SPONSOR - Sponsor Users
TRAINEE - Trainee
UNDERGRADUATE - Undergraduate

Close | Add Role(s)

Select Add Role(s)

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Scenario 3

SO: View and Create

Note: You are also able to remove roles accidentally added

Roles

+ Add Roles | ✖ Remove All

Showing 1 - 1 of total 1

Role(s)	Organization(s)	Action
PI	Starfleet Academy	✖ Remove

Create | Clear

Select Create

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Next Steps

- The PD will receive 2 separate emails. One email will have their account information and the other email will have their temporary password. Password expires after 48 hours.
- The PD will need to log into Commons with the account information and temporary password. They are required to change their temporary password.
- If you have completed your registration with eRA Commons and Grants.gov and your PD has an account in eRA Commons with the PI role and affiliated with your organization, you can begin applying to FOAs.

Applying to FOAs

Key Information

Do not wait until the last minute to fill out and submit your application – allow for plenty of time to address submission errors that arise (At Least 72 hours prior to the application deadline).

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Key Information

- You can apply using eRA ASSIST, Grants.gov Workspace, or another system-to-system provider.
- Successfully submitted applications are sent to eRA Commons where they go through data validation checks
  - Your application is only considered submitted once all validations are passed from both Grants.gov AND eRA Commons. Applications must be error-free on or before the due date.
- If using eRA ASSIST, any member with an eRA Commons role within your organization may start an application or may be given access to an application to work on it. You do not need an SO or PD role to start the application process.

Accessing ASSIST

Click on the ASSIST Tab on the menu bar

A program of the National Institutes of Health

U.S. Department of Health & Human Services www.hhs.gov

Commons
A program of the National Institutes of Health

Welcome: Business Official
ID: JHSTAGESO
Institution: UNIVERSITY OF CALIFORNIA SAN DIEGO
Roles: SO
Logout | Contact Us | Help

Home Admin Institution ASSIST Prior Approval RPPR xTrain xTRACT Admin Supp eRA Partners Non-Research

Welcome to the Commons

To connect to the ***OFFICIAL PRODUCTION*** version of the NIH Commons, use this URL: https://commons.era.nih.gov/commons/.

Welcome

Business Official
ID: JHSTAGESO
Institution: UNIVERSITY OF CALIFORNIA SAN DIEGO
Roles: SO

eRA Service Desk

- **Hours:** Mon-Fri, 7AM-8PM EDT/EST
- **Web:** http://grants.nih.gov/support
- **Toll-free:** 866-504-9552
- **Phone:** 301-402-7469

Contact initiated outside of business hours via Web or voice mail will be returned the next business day.

System Information Message

All systems are available at this time.

Commons allows you to perform the following activities below based on the privileges associated with this profile:

- **Administration** - Allows you to assign a delegate to perform system and accounts maintenance more...
- **Institution Profile** - Enables you to view and update institution information more...
- **Personal Profile** - Allows you to update your personal information more...
- **Status** - Allows you to check the status of grants and applications that have been submitted more...
- **RPPR** - Allows you to review the information needed to complete a progress report. See RPPR Information and Submitting Progress Reports.
- **xTrain** - Enables you in a Trainee or SO role to confirm the information that you have submitted for a Trainee role type more...
- **Internet Assisted Review (IAR)** - Allows reviewer to submit critiques and preliminary scores for applications they are reviewing more...

What's New

- New in RPPR
- New Service Desk System

Commons Resources

- Frequently Asked Questions
- Latest Release Notes
- Commons Login Tutorial
- Commons Support Page
- eRA Training
- User Guides
- Grantee Organization Registration
- eRA Website
- Applying Electronically

Additional Links

- eRA Contacts
- RePORT

Initiating an Application in ASSIST

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U.S. Department of Health & Human Services

eRA Commons | Home | Logout | Service Desk | Contact Us

Application Submission System & Interface for Submission Tracking (ASSIST)

Sponsored by the National Institutes of Health

Username: JHSTAGESO

Enter the FOA number

Welcome

Welcome to the Application Submis stem & Interface for Submission Tracking (ASSIST)

INITIATE APPLICATION

Funding Opportunity Announcement #
(Example: PA-XX-XXX or LITC-ABCD-XX-000)

Go

The National Institutes of Health posts Funding Opportunity Announcements (FOAs) in the NIH Guide for Grants & Contracts and in Grants.gov's Search Grants . Each resource has robust search functionality to identify opportunities of interest. ASSIST can only be used to prepare and submit applications when explicitly stated in the FOA.

SEARCH FOR APPLICATION

Search Applications

Need Help?

Resources

APPLICATION GUIDE

ASSIST USER GUIDE

ERA COMMONS

FOA Information (1 of 2)

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eRA Commons | Home | Logout | Service Desk | Contact Us

Application Submission System & Interface for Submission Tracking (ASSIST)
Sponsored by the National Institutes of Health

Username: JHSTAGESO

Welcome

Home > Search for Applications > Initiate Application

Initiate Application for FOA #: TI-18-123
(Example only)

After initiation, the *Lead Application Organization Name* and *Lead Application Organization DUNS* cannot be changed.

An Initiate Application Screen will appear with pre-filled FOA information

FOA INFORMATION:

** Required field(s)*

FOA Number:	TI-18-123 (Example only)
Opportunity Title:	Example Opportunity Grant
Offering Agency:	SAMHSA
CFDA Number:	93.788 (Example only)
CFDA Description:	Example EOG
Competition ID:	TI-18-123 (Example only)
Competition Title:	Example Opportunity Grant
Opportunity Open Date:	06/21/2018
Opportunity Close Date:	08/20/2018
Agency Contact:	Example@samhsa.hhs.gov
Application Identifier:	
Application Project Title * (describe title in 200 characters)	

FOA Information (2 of 2)

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Opportunity Open Date: 06/21/2018

Opportunity Close Date: 08/20/2018

Agency Contact: Example@samhsa.hhs.gov

Application Identifier:

Application Project Title *
(describe title in 200 characters)

Lead Applicant Organization: * UNIVERSITY OF CALIFORNIA SAN DIEGO

Lead Applicant Organization Address:
UNIVERSITY OF CALIFORNIA SAN DIEGO
OFFICE OF CONTRACT & GRANT ADMIN, 0934
LA JOLLA, CA 920930934

Lead Organization DUNS: 8043557900000

SAM Registration Expiration Date: 03/23/2019

An active SAM Registration is required to submit your application to the agency — Click for SAM Registration Details

Contact Project Director/Principal Investigator

Enter PD/PI Information below or — Pre-fill Application from Username — Clear

First Name:

Middle Name:

Name:

Initiate Application — Cancel

You will only have one organization option unless you are affiliated with multiple organizations

PD information will be prepopulated if the PD initiates the application. Otherwise, use the Pre-fill option.

After entering your project title, organization, and PD, click Initiate Application

Application Summary Page

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U.S. Department of Health & Human Services

eRA Commons | Home | Logout | Service Desk | Contact Us

Application Submission System & Interface for Submission Tracking (ASSIST)

Sponsored by the National Institutes of Health

Username: JHSTAGESO

Actions

- MANAGE ACCESS
- ADD OPTIONAL FORM
- PREVIEW APPLICATION
- VALIDATE APPLICATION
- VIEW STATUS HISTORY
- UPDATE SUBMISSION STATUS
- COPY APPLICATION
- DELETE APPLICATION

Home > Search for Applications > Application Search Results > Application Information

Hide Navigation

Show Help

Application Information

This is a test

Summary | SF424 Cover

Application Information

Application Identifier:	6622
Application Project Title:	Example project title
PD/PI Name:	
Organization:	
Project Period:	
Status:	Work in Progress Submit Application
Status Date:	2018-07-12 05:01:00.000 PM EDT

To be able to easily find your application later remember to write down your Application Identifier

Accessing In-Progress Applications in ASSIST

Key Information

- As noted, each application is assigned a unique Application Identifier.

- You can search for applications using this Application Identifier, or if you do not know it, use other search criteria.

Accessing the Search Page in ASSIST

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eRA Commons | Home | Logout | Service Desk | Contact Us

Application Submission System & Interface for Submission Tracking (ASSIST)

Sponsored by the National Institutes of Health

Username: JHSTAGESO

Welcome

Welcome to the Application Submission System & Interface for Submission Tracking (ASSIST)

INITIATE APPLICATION

Funding Opportunity Announcement #
(Example: PA-XX-XXX or LITC-ABCD-XX-000)

Go

The National Institutes of Health posts Funding Opportunity Announcements (FOAs) in the NIH Guide for Grants & Contracts and in Grants.gov's Search Grants . Each resource has robust search functionality to identify opportunities of interest. ASSIST can only be used to prepare and submit applications when explicitly stated in the FOA.

SEARCH FOR APPLICATION

Search Applications

Need Help?

Resources

- APPLICATION GUIDE
- ASSIST USER GUIDE
- ERA COMMONS

Search Page in ASSIST

A program of the National Institutes of Health

Welcome

Home > Search for Applications

Search for Applications

Application Identifier: 6622

Application Project Title:

Agency:

PD/PI First Name:

PD/PI Middle Name:

PD/PI Last Name:

Lead Applicant Organization:

Submission Status:
(select all that apply)

Work in Progress
All Components Final
Ready for Submission
Submitted
Submission Errors
Abandoned

Hide Abandoned Applications? ☑

HSS Applications? ☐

Submission Date: from to

Project Start Date:

Project End Date:

Search Clear

If you have the Application Identifier, enter it here and click Search. There will only be one result when searching by the Application Identifier.

If you don't have the Application Identifier, enter other search criteria like your Project Title, Organization, Agency, and the Submission Status

Search Results (1 of 2)

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eRA Commons | Home | Logout | Service Desk | Contact Us

Application Submission System & Interface for Submission Tracking (ASSIST)

Sponsored by the National Institutes of Health

Username: JHSTAGESO

Home > Search for Applications > Search for Application Results

Search for Application Results

One item found.

Application Identifier	Application Project Title	Agency	PD/PI Name	Lead Applicant Organization	Submission Status	Submission Date	Project Start Date	Project End Date	Action
6622	Example project title	SAMHSA		UNIVERSITY OF CALIFORNIA SAN DIEGO	Work in Progress				Select

Contact Us Help Desk Privacy Notice Accessibility Disclaimer

Select the application you would like to view

Search Results (2 of 2)

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U.S. Department of Health & Human Services

eRA Commons | Home | Logout | Service Desk | Contact Us

Application Submission System & Interface for Submission Tracking (ASSIST)

Sponsored by the National Institutes of Health

Username: JHSTAGESO

Actions

- MANAGE ACCESS
- ADD OPTIONAL FORM
- PREVIEW APPLICATION
- VALIDATE APPLICATION
- VIEW STATUS HISTORY
- UPDATE SUBMISSION STATUS
- COPY APPLICATION
- DELETE APPLICATION

Home > Search for Applications > Application Search Results > Application Information

Hide Navigation

Show Help

Application Information

You will be taken to the Application Information page

This is a test

Summary | SF424 Cover

Application Information

Application Identifier:	6622
Application Project Title:	Example project title
PD/PI Name:	
Organization:	
Project Period:	
Status:	Work in Progress Submit Application
Status Date:	2018-07-12 05:01:00.000 PM EDT

Filling out Applications in ASSIST

A program of the National Institutes of Health

Required and Optional Forms on Grants.gov

HELP | REGISTER | LOGIN

GRANTS.GOV

FIND. APPLY. SUCCEED.

SEARCH Grant Opportunities Enter Keyword... GO

HOME | LEARN GRANTS | SEARCH GRANTS | APPLICANTS | GRANTORS | SYSTEM-TO-SYSTEM | FORMS | CONNECT | SUPPORT

GRANTS.GOV > Search Grants

VIEW GRANT OPPORTUNITY

Back to Link

Preview Opportunity Package Details

Opportunity Package Details:

Agency Contact Information: Example@samhsa.hhs.gov

Who Can Apply: Organization Applicants

PACKAGE FORMS: Download Instructions

Mandatory Forms (Click to Preview)	Optional Forms (Click to Preview)
» Application for Federal Assistance (SF-424) [V2.1]	» Disclosure of Lobbying Activities (SF-LLL) [V1.2]
» Budget Information for Non-Construction Programs (SF-424A) [V1.0]	
» Project/Performance Site Location(s) [V2.0]	
» Project Abstract Summary [V1.1]	
» Project Narrative Attachment Form [V1.1]	
» Budget Narrative Attachment Form [V1.1]	
» Assurances for Non-Construction Programs (SF-424B) [V1.1]	
» Other Attachments Form [V1.2]	

Close

Grants.gov Workspace vs ASSIST Form Names

- ASSIST and Grants.gov Workspace require the same forms although the label names may be different
  - * indicates an optional form

Grants.gov Workspace Form Name	ASSIST Form Name
Application for Federal Assistance (SF-424)	SF424 Cover
Budget Information for Non-Construction Programs (SF-424A)	Budget – Non-Construct.
Project/Performance Site Location(s)	Sites
Project Abstract Summary	Project Abstract Summary
Project Narrative Attachment Form	Project Narrative
Budget Narrative Attachment Form	Budget Narrative
Assurances for Non-Construction Programs (SF-424B)	NonConstruct. Assurances
Other Attachments Form	Other Narrative Attachments
Disclosure of Lobbying Activities (SF-LLL)*	Lobbying Disclosure*

Completing Forms - Key Information

- At a minimum, all required fields on all required forms need to be filled out. If applicable, fill out optional forms as well.
  - The Lobbying Disclosure form should be added and filled out if any individuals working on and receiving funding from the grant are part of any lobbying activities or associated with any lobbying.
- Each time you edit the form, the system automatically locks that form. This means that only the person that locked the form will be able to edit it.
  - You can remove locks by selecting an option at the bottom of a form that includes Release Lock

- When you have filled out all required components of the application, you may run validations on it. This will check to make sure your application is error-free.

Avoid Common Errors on the SF424

- Use the Commons ID of your PD as the Applicant Identifier on the SF424, item field #4.
  - The account ID provided must have the PI role and be affiliated with your organization.

- On the SF424 Cover, Section 17, Proposed Project Start Date and End Date should match up with years.
  - E.g. 09/30/18 - 09/29/19 is one year. 09/30/18 – 09/30/19 is one year and one day.

Avoid Common Formatting Errors

- Incomplete Zip Code
  - All ZIP Codes must be in ZIP + 4 format (e.g. 208171852 instead of 20817)
  - To locate your full zip code, you can visit https://tools.usps.com/zip-code-lookup.htm?byaddress
- Invalid Congressional District
  - To look up the Congressional Districts, you can visit http://www.house.gov.
  - Enter them in the form 2 digit state abbreviation – 3 digit number, or for example "MD-008" for Maryland's 8th district.
- Project Duration
  - On the Project Abstract Summary form - enter the project duration in months (e.g. a 2-year program project duration is 24 months)

Avoid Common Issues with the Budget – Non-Construct. Form

A program of the National Institutes of Health

- The Federal Total for 1st year, in Section D- Forecasted Needs, MUST equal Section A, New or Revised Budget Federal Totals (e-5) amount.
- The Non-Federal Total for 1st year MUST equal the sum of Estimated Unobligated Funds Non-Federal Totals (d-5) and New or Revised Budget Non-Federal Totals (f-5).
- The SECTION B - Budget Categories: k. TOTALS Total (5) MUST equal SECTION A - Budget Summary: 5.Totals Total (g).
- The SECTION D - Forecasted Cash Needs: 15. TOTAL MUST equal SECTION A - Budget Summary: 5.Totals Total (g).
- You MUST input the correct number of years for the project (e.g. Project Period) on the SF 424 block 17. Ensure that the budget periods address the full project period by entering data in the SF 424 A. Enter data for the first budget period in Section D and enter future budget periods in Section E. Please refer to the Funding Opportunity Announcement (FOA) for additional guidance.

The following two slides contain a sample budget prepared by SAMHSA to illustrate the fields that must match on the SF424A.

Sample SF424 A Budget: Match Not Required Federal FOA

A program of the National Institutes of Health

Cost Sharing/Match Required?: No

Enter the CFDA # from the 1st page of the FOA

Complete only this column Federal (e)

Use the "New or Revised Budget" section for New Applications

On row 1 input: FOA# - Federal (e.g. XX-19-000 – Federal)

BUDGET INFORMATION - Non-Construction Programs

OMB Approval No. 4040-0006
Expiration Date 06/30/2014

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. TI-18-016 - Federal	93.788			$247,500.00		$247,500.00
2. (Example only)	(Example only)					$0.00
3.						$0.00
4.						$0.00
5. Totals		$0.00	$0.00	$247,500.00	$0.00	$247,500.00

All totals in the circles must match

Section A Total

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	GRANT PROGRAM, FUNCTION OR ACTIVITY				Total
	(1) TI-18-016 - Federal	(2)	(3)	(4)	(5)
a. Personnel	$80,000.00				$80,000.00
b. Fringe Benefits	$30,000.00				$30,000.00
c. Travel	$21,000.00				$21,000.00
d. Equipment	$28,000.00				$28,000.00
e. Supplies	$7,000.00				$7,000.00
f. Contractual					$0.00
g. Construction					$0.00
h. Other	$81,500.00				$81,500.00
i. Total Direct Charges (*sum of 6a-6h*)	$247,500.00				$247,500.00
j. Indirect Charges					$0.00
k. TOTALS (*sum of 6i and 6j*)	$247,500.00				$247,500.00
7. Program Income					$0.00

Section B Total

Note: Section A Total must equal Section B Total

SAMHSA
Substance Abuse and Mental Health Services Administration

Sample SF424 A Budget: Match Not Required Federal FOA

A program of the National Institutes of Health

Cost Sharing/Match Required?: No

Section C is not applicable (match not required)

SECTION C - NON-FEDERAL RESOURCES				
(a) Grant Program	(b) Applicant	(c) State	(d) Other Sources	(e) TOTALS
8. TI-18-016 - Federal (Example only)				$0.00
9.				$0.00
10.				$0.00
11.				$0.00
12. TOTAL (sum of lines 8-11)	$0.00	$0.00	$0.00	$0.00

All totals in the circles should match (sections A, B, D)*

Section D is for the 1st federal year of funding only (match not required).

Show funds allocation per quarter.

SECTION D - FORECASTED CASH NEEDS					
	Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
13. Federal	$247,500.00	$61,875.00	$61,875.00	$61,875.00	$61,875.00
14. Non-Federal	$0.00				
15. TOTAL (*sum of lines 13 and 14*)	$247,500.00	$61,875.00	$61,875.00	$61,875.00	$61,875.00

SECTION E - BUDGET ESTIMATES OF FEDERAL FUNDS NEEDED FOR BALANCE OF THE PROJECT				
(a) Grant Program	FUTURE FUNDING PERIODS (Years)			
	(b) First	(c) Second	(d) Third	(e) Fourth
16. TI-18-016 - Federal (Example only)	$247,500.00			
17.				
18.				
19.				
20. TOTAL (*sum of lines 16-19*)	$247,500.00	$0.00	$0.00	$0.00

Section E is for the future budget period (year 2)

Federal funds needed for 2nd budget period

SECTION F - OTHER BUDGET INFORMATION	
21. Direct Charges:	22. Indirect Charges:
23. Remarks:	

Section F is optional

Standard Form 424A (rev. 7-97) Page2

* Section D – Forecasted Cash Needs, Federal (line 13) amount must equal Section A Budget Summary and Section B Budget Categories federal funding. Ensure that Section D "TOTAL" amount = Section A and Section B TOTALS.

Sample SF424 A Budget: Match Required

A program of the National Institutes of Health

(Match Ratio is 3:1)

On row 1 input: FOA# - Federal (e.g. SM-18-005 - Federal)

Enter the CFDA # from the 1st page of the FOA

Use the first row only (Line 1) to report Total Federal Funds for the 1st Year of project only

Use the "New or Revised Budget" section for New Applications and Continuations

BUDGET INFORMATION - Non-Construction Programs

OMB Approval No. 4040-0006
Expiration Date 06/30/2014

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. SM-18-005 - Federal	93.243			$247,500.00		$247,500.00
2. SM-18-005 - Non-Federal	93.243				$82,500.00	$82,500.00
3.						$0.00
4.						$0.00
5. Totals		$0.00	$0.00	$247,500.00	$82,500.00	$330,000.00

On row 2 input: FOA# - Non-Federal (e.g. SM-18-005 - Non-Federal)

This section "Estimated Unobligated Funds: columns – Federal (c) and Non-Federal (d) are not applicable

Use the second row only (Line 2) to report Total Non-Federal Match for the First Year of project only

Section A Totals

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	GRANT PROGRAM, FUNCTION OR ACTIVITY				Total (5)
	(1) SM-18-005 - Federal	(2) SM-18-005 - Non-Federal	(3)	(4)	
a. Personnel	$80,000.00	$80,000.00			$160,000.00
b. Fringe Benefits	$30,000.00				$30,000.00
c. Travel	$21,000.00				$21,000.00
d. Equipment	$28,000.00				$28,000.00
e. Supplies	$7,000.00	$2,500.00			$9,500.00
f. Contractual					$0.00
g. Construction					$0.00
h. Other	$81,500.00				$81,500.00
i. Total Direct Charges (*sum of 6a-6h*)	$247,500.00	$82,500.00			$330,000.00
j. Indirect Charges					$0.00
k. TOTALS (*sum of 6i and 6j*)	$247,500.00	$82,500.00			$330,000.00
7. Program Income					$0.00

Use column (1) for the Federal Funding requested for the 1st year of project only

Use column (2) to enter the Non- Federal Match for the 1st year of project only

Note: Section A Totals must equal Section B Totals

Section B Totals

Total Federal Requested

Total Non-Federal Match Reported

Standard Form 424A (Rev. 7-97)
Prescribed by OMB Circular A-102

SAMHSA
Substance Abuse and Mental Health Services Administration

Sample SF424 A Budget: Match Required

Section C - use the second row to report Total Non-Federal Match for the First Year of project [2]

SECTION C - NON-FEDERAL RESOURCES				
(a) Grant Program	(b) Applicant	(c) State	(d) Other Sources	(e) TOTALS
8. SM-18-005 - Federal				$0.00
9. SM-18-005 - Non-Federal	$82,500.00			$82,500.00
10.				$0.00
11.				$0.00
12. TOTAL (sum of lines 8-11)	$82,500.00	$0.00		$82,500.00

All totals in the circles should match (sections A, B, D) [3]

Complete Section D for the 1st year of funding and how funds will be spent per quarter for the 1st year

SECTION D - FORECASTED CASH NEEDS					
	Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
13. Federal	$247,500.00	$61,875.00	$61,875.00	$61,875.00	$61,875.00
14. Non-Federal	$82,500.00	$20,625.00	$20,625.00	$20,625.00	$20,625.00
15. TOTAL (*sum of lines 13 and 14*)	$330,000.00	$82,500.00	$82,500.00	$82,500.00	$82,500.00

SECTION E - BUDGET ESTIMATES OF FEDERAL FUNDS NEEDED FOR BALANCE OF THE PROJECT				
(a) Grant Program	FUTURE FUNDING PERIODS (Years)			
	(b) First	(c) Second	(d) Third	(e) Fourth
16. SM-18-005 - Federal	$247,500.00	$247,500.00	$247,500.00	$247,500.00
17. SM-18-005 - Non-Federal	$82,500.00	$82,500.00	$82,500.00	$82,500.00
18.				
19.				
20. TOTAL (*sum of lines 16-19*)	$330,000.00	$330,000.00	$330,000.00	$330,000.00

Section E is for the future budget period - Years 2-5

This column is the 2nd budget period

This column is the 3rd budget period

This column is the 4th budget period

This column is the 5th budget period

SECTION F - OTHER BUDGET INFORMATION	
21. Direct Charges:	22. Indirect Charges:
23. Remarks:	

Section F is optional

Standard Form 424A (rev. 7-97) Page2

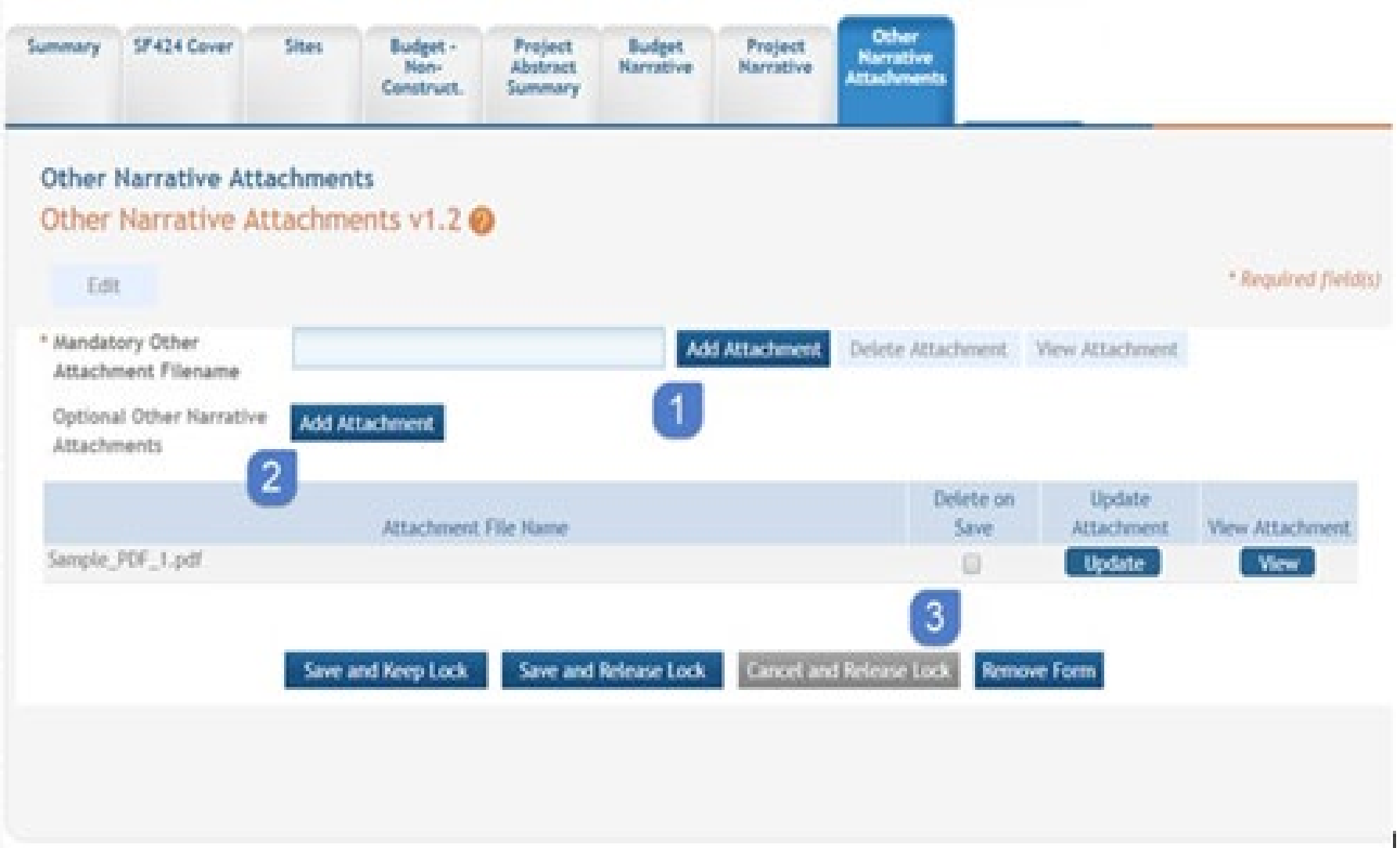
Uploading Files

- Upload supporting documentation to the Other Narrative Attachments form.
  - Per the FOA, this includes but is not limited to the SMA 170 form, HHS 690 form, Biographical Sketches and Job Descriptions, Confidentiality and SAMHSA Participant Protection/Human Subjects form.
  - Do not combine Other Narrative Attachments form into one document. Please upload them separately.
- File uploads
  - All attachments **MUST** be provided to the agency in PDF format with a .pdf extension (e.g. .pdf).
  - The PDFs cannot be empty .
  - Your file upload for the Budget Narrative form should be named “BNF”. Your full filename including file type would then be “BNF.PDF”
  - Save the fillable form to your computer with a new name and open to make sure the information you enter into the fields is saved and visible when you reopen the form before uploading.
- Do not use the same file name for more than one file.
- Do not use any attachment functions in other programs, such as the Acrobat Attach File feature, only attach files with the ASSIST functionality.

Uploading Files to Other Narrative Attachments

A program of the National Institutes of Health

1. Add a PDF document using the “Add Attachment” button labelled 1. Delete it or view it later using the buttons next to “Add Attachment”.
2. Add additional PDF documents beyond the first using the “Add Attachment” button labelled 2.
3. Replace or view additional PDF documents using the buttons labelled 3. To remove an additional document check the “Delete on Save” box and save the Other Narrative Attachments form.



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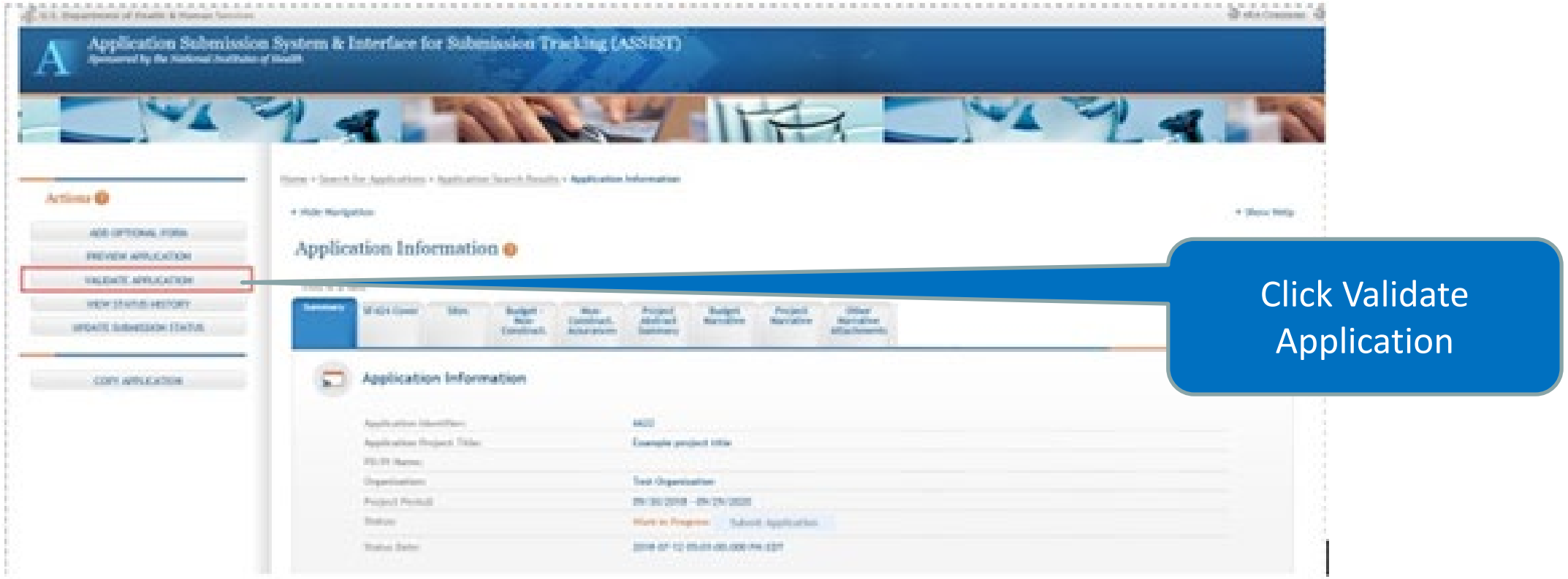
Validating Applications and Updating Statuses in ASSIST

Validating Your Application

- Once you are finished filling out your application, validate it to check that all business and system validations pass and you will be able to submit your application.



Application Validations: Warnings and Errors

Errors MUST be corrected in order to submit

You may submit with Warnings if needed

U.S. Department of Health & Human Services

Application Submission System & Interface for Submission Tracking (ASSIST)
Sponsored by the National Institutes of Health

Application Errors and Warnings Results

Application Information

Application Identifier:	6622
FOA Number:	TI-18-123 (Example only)
Application Project Title:	Example project title
PD/PI Name:	
Organization:	Test Organization

Errors

Total Errors to be corrected before the application can be submitted: 3

Form Name	Error Message
Budget - NonConstruct.	The SECTION B - Budget Categories: k. TOTALS Total (5) does not equal to SECTION A - Budget Summary: 5.Totals Total (g). (026.43.2)
Budget - NonConstruct.	The Federal Total for 1st year, in Section D- Forecasted Needs, does not equal the Section A, New or Revised Budget Federal Totals (e-5) amount. (026.58.2)
Budget - NonConstruct.	The SECTION D - Forecasted Cash Needs: 15. TOTAL does not equal to SECTION A - Budget Summary: 5.Totals Total (g). (026.62.1)

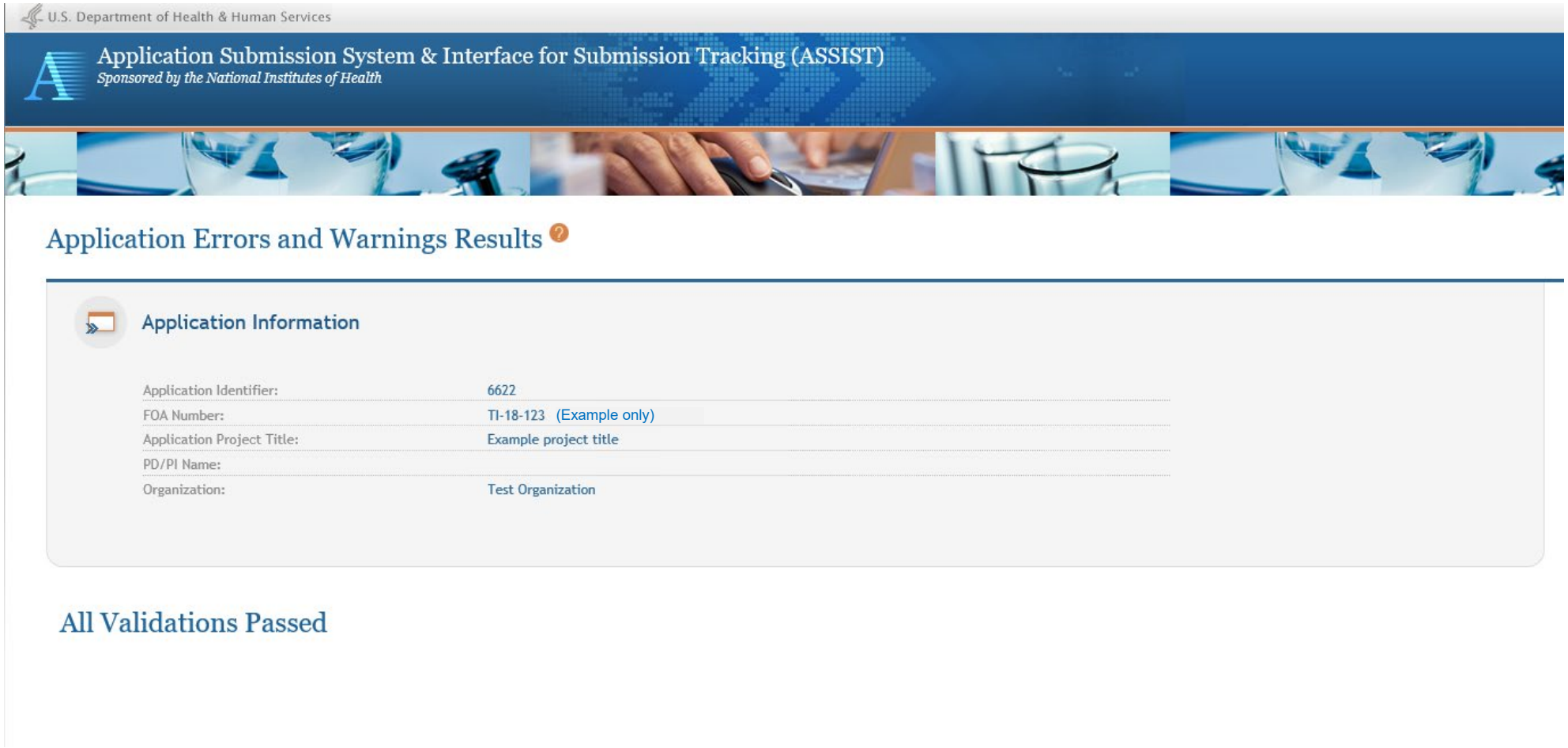
Warnings

Total Warnings to be corrected at Applicant discretion: 1

Form Name	Warning Message
Budget - NonConstruct.	The Section B Totals amount for Program, Function Or Activity TI-18-333 must equal the total amount in Section A for Program, Function Or Activity (1). (026.39.2)

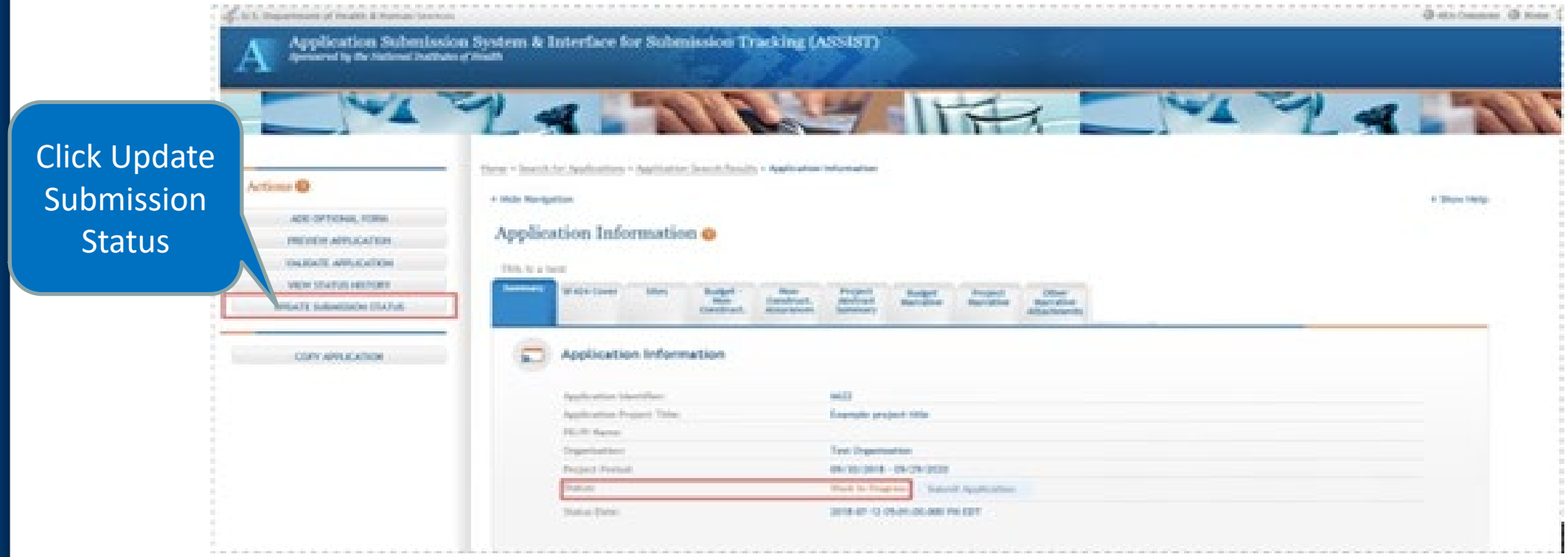
All Validations Passed

- If all validations pass, your application is ready to be submitted.



Update Submission Status (1 of 2)

- To allow your application to be submitted, you must change the status to “Ready for Submission.” Validations will run automatically before the status is updated.



Update Submission Status (2 of 2)

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Home > Search for Applications > Application Search Results > Application Information

Hide Navigation

Show Help

Application Information

This is a test

Summary | SF424 Cover | Sites | Budget - Non-Construct. | Non-Construct. Assurances

Application Information

Status Date: 2018-07-12 05:01:00.000 PM EDT

Update Submission Status

Select the new status -- Select Status -- / Ready for Submission

Enter a comment on the status of this submission or continue without adding a comment.

Add comment | Cancel

Screen Rendered: 07/16/2018 07:04:12 EDT | Screen Id: ASSIST0034@2289

Version: 2.29.03

Select Ready for Submission

Enter a comment and click Add comment to update the status if validations pass

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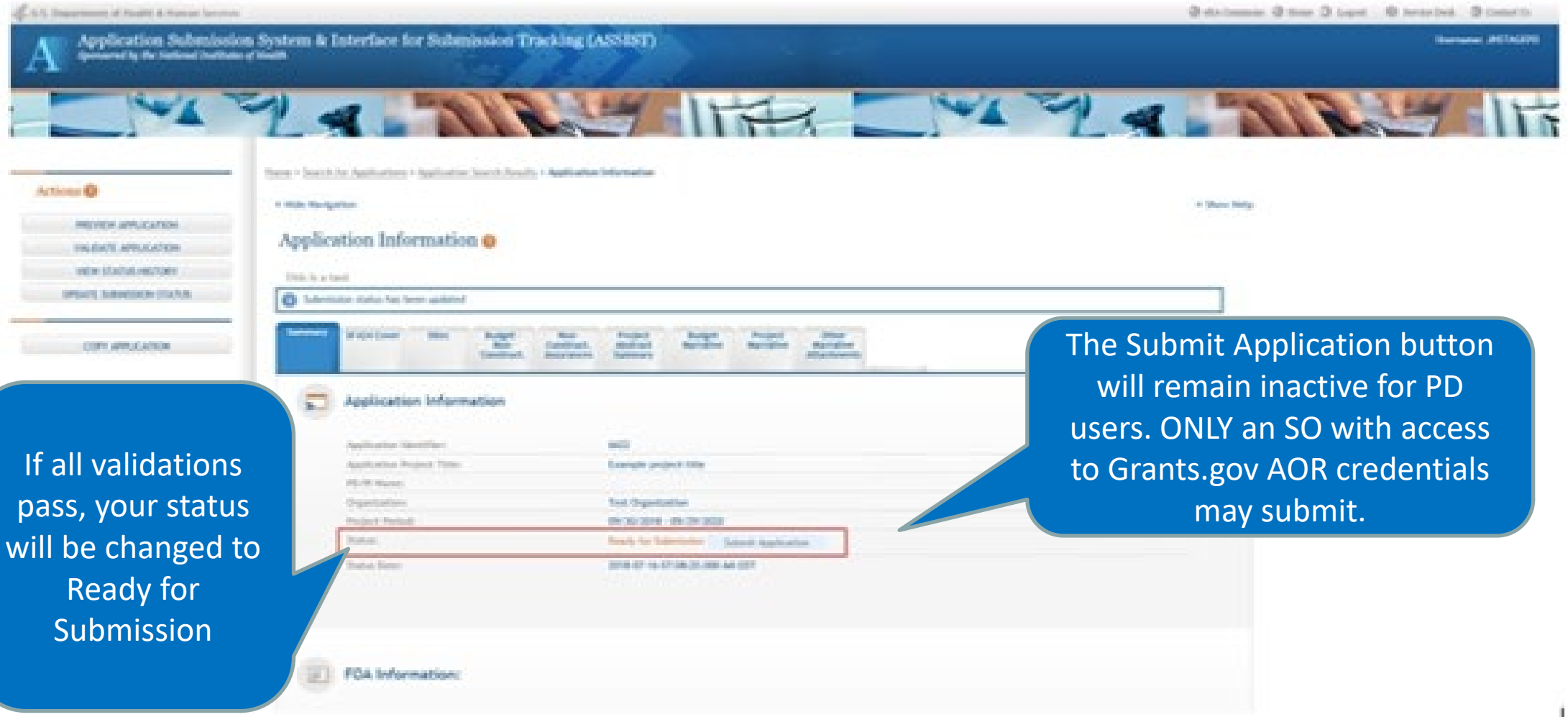
Ready for Submission: PD view



If all validations pass, your status will be changed to Ready for Submission

The Submit Application button will remain inactive for PD users. ONLY an SO with access to Grants.gov AOR credentials may submit.

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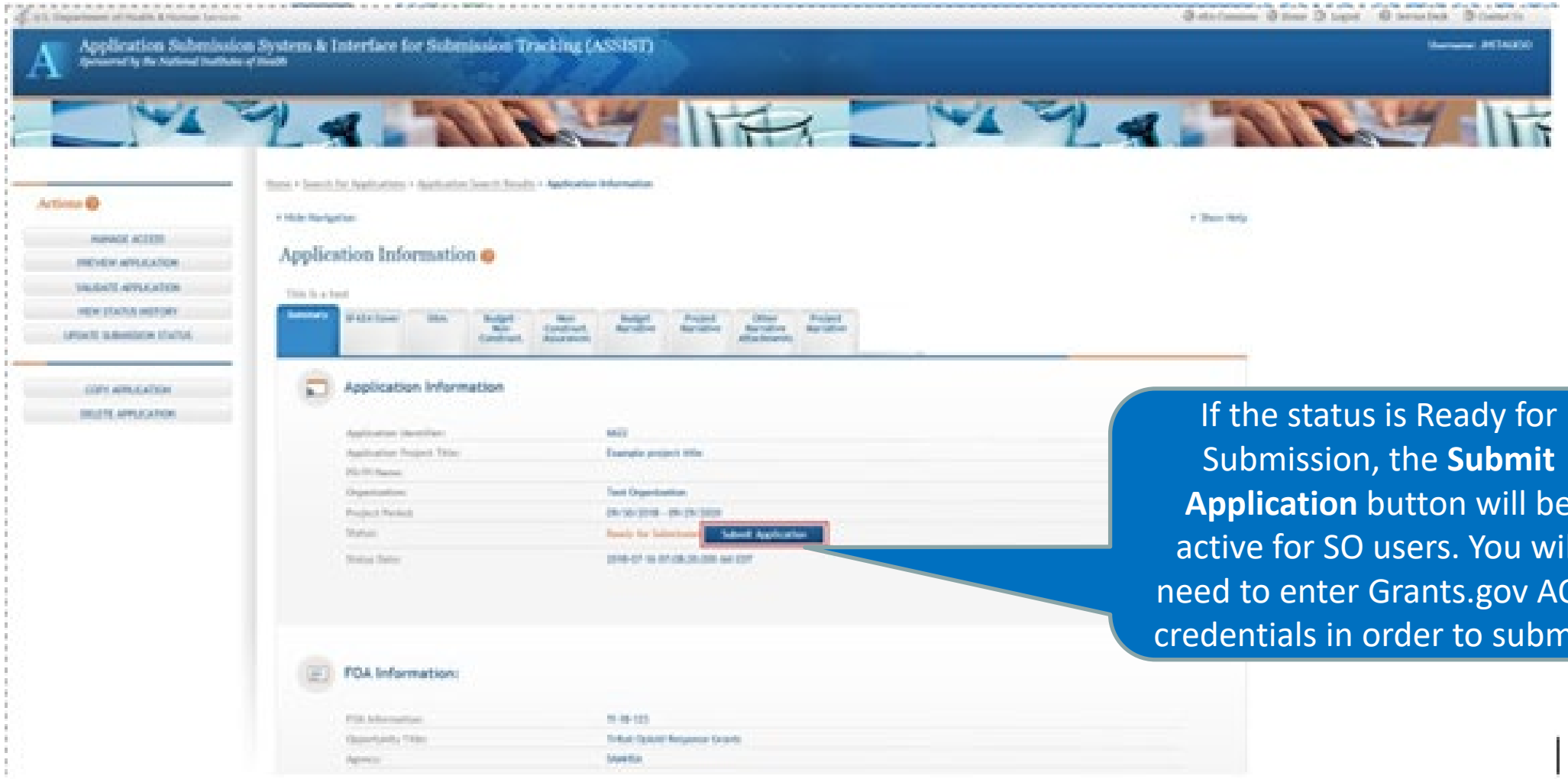
Ready for Submission: SO view



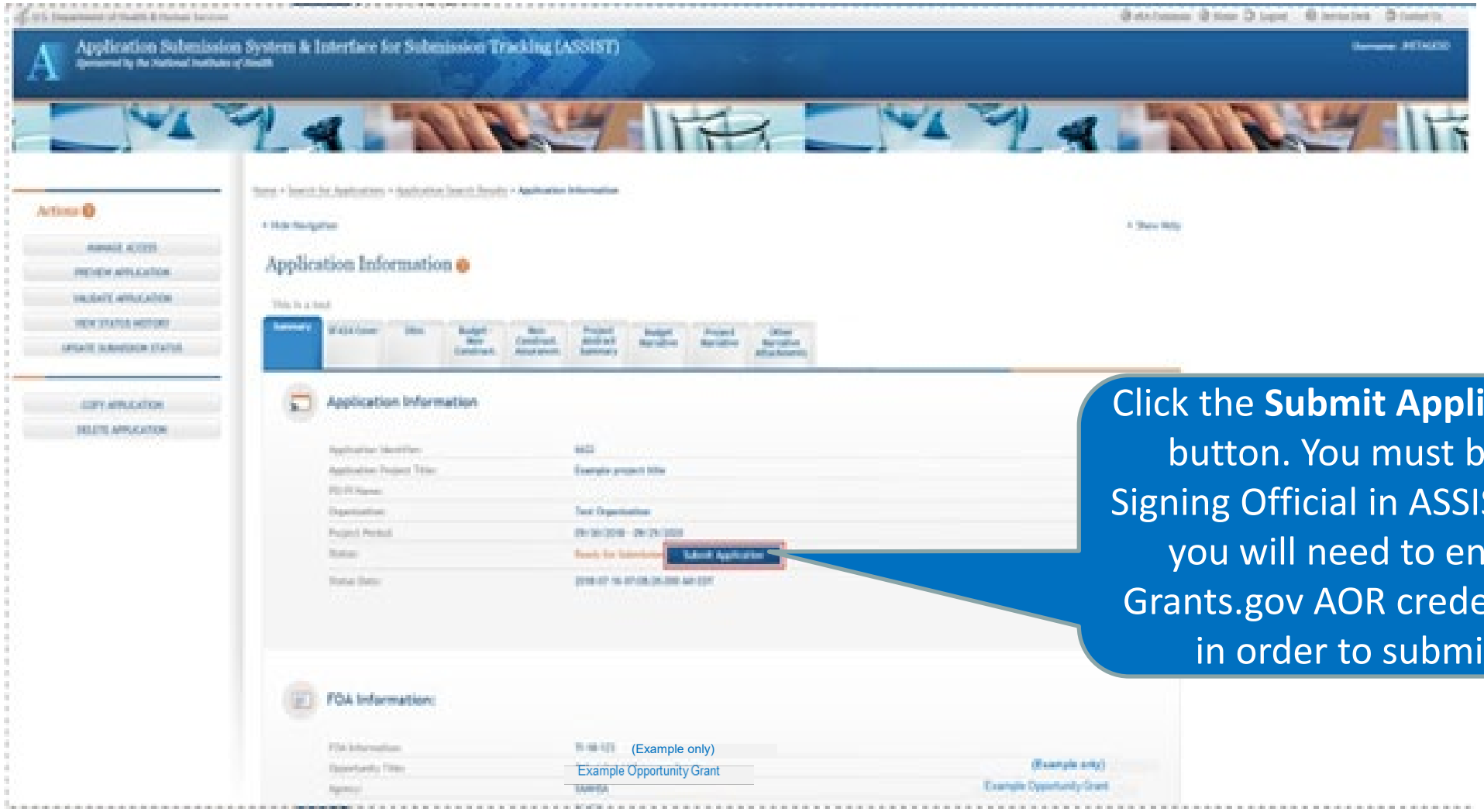
If the status is Ready for Submission, the **Submit Application** button will be active for SO users. You will need to enter Grants.gov AOR credentials in order to submit.

Submitting Applications in ASSIST

Key Information

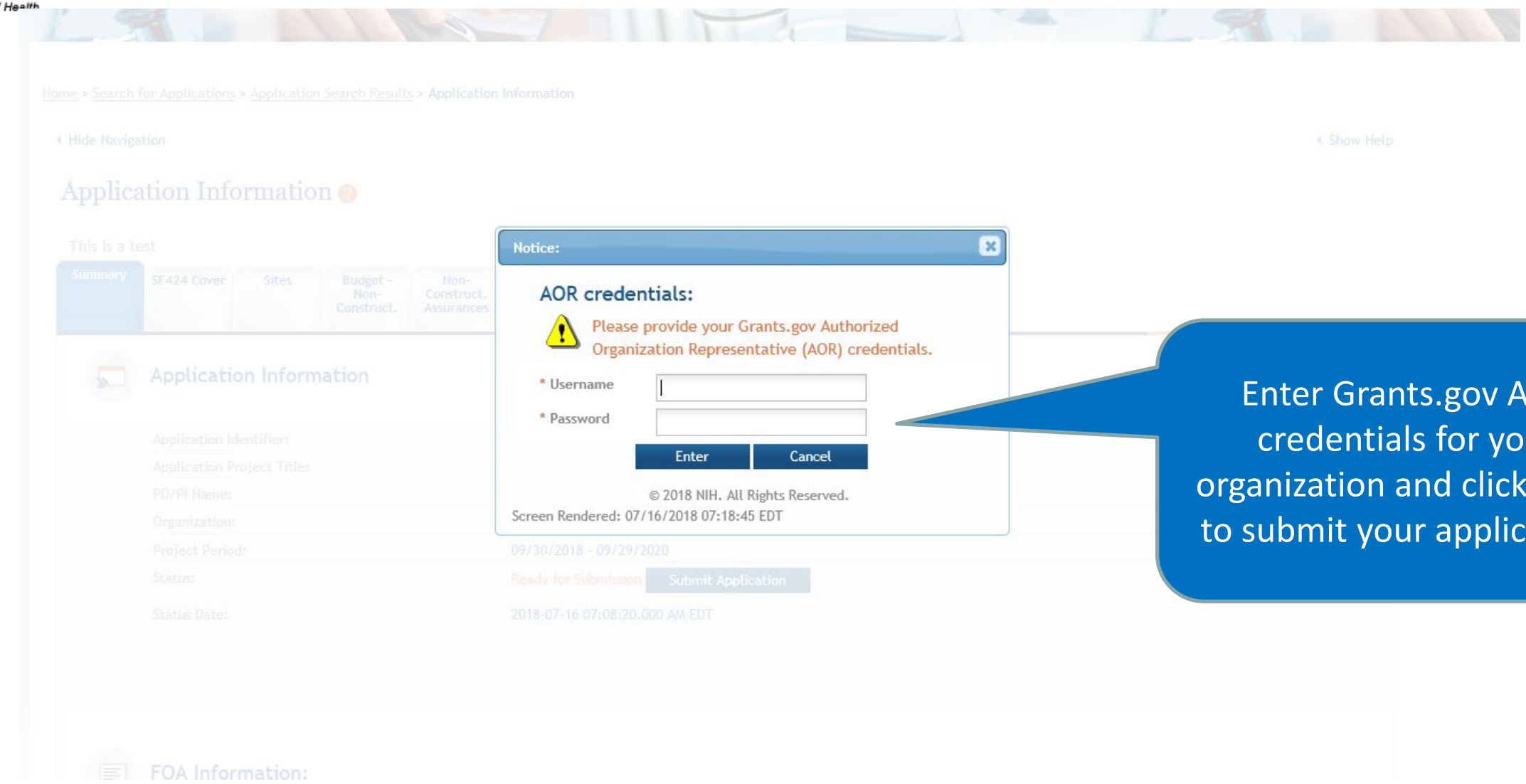
Do not wait until the last minute to fill out and submit your application – allow for plenty of time to address submission errors that arise (At Least 72 hours prior to the application deadline).

Submitting Applications (1 of 2)



Click the **Submit Application** button. You must be a Signing Official in ASSIST and you will need to enter Grants.gov AOR credentials in order to submit.

Submitting Applications (2 of 2)



Enter Grants.gov AOR credentials for your organization and click Enter to submit your application.

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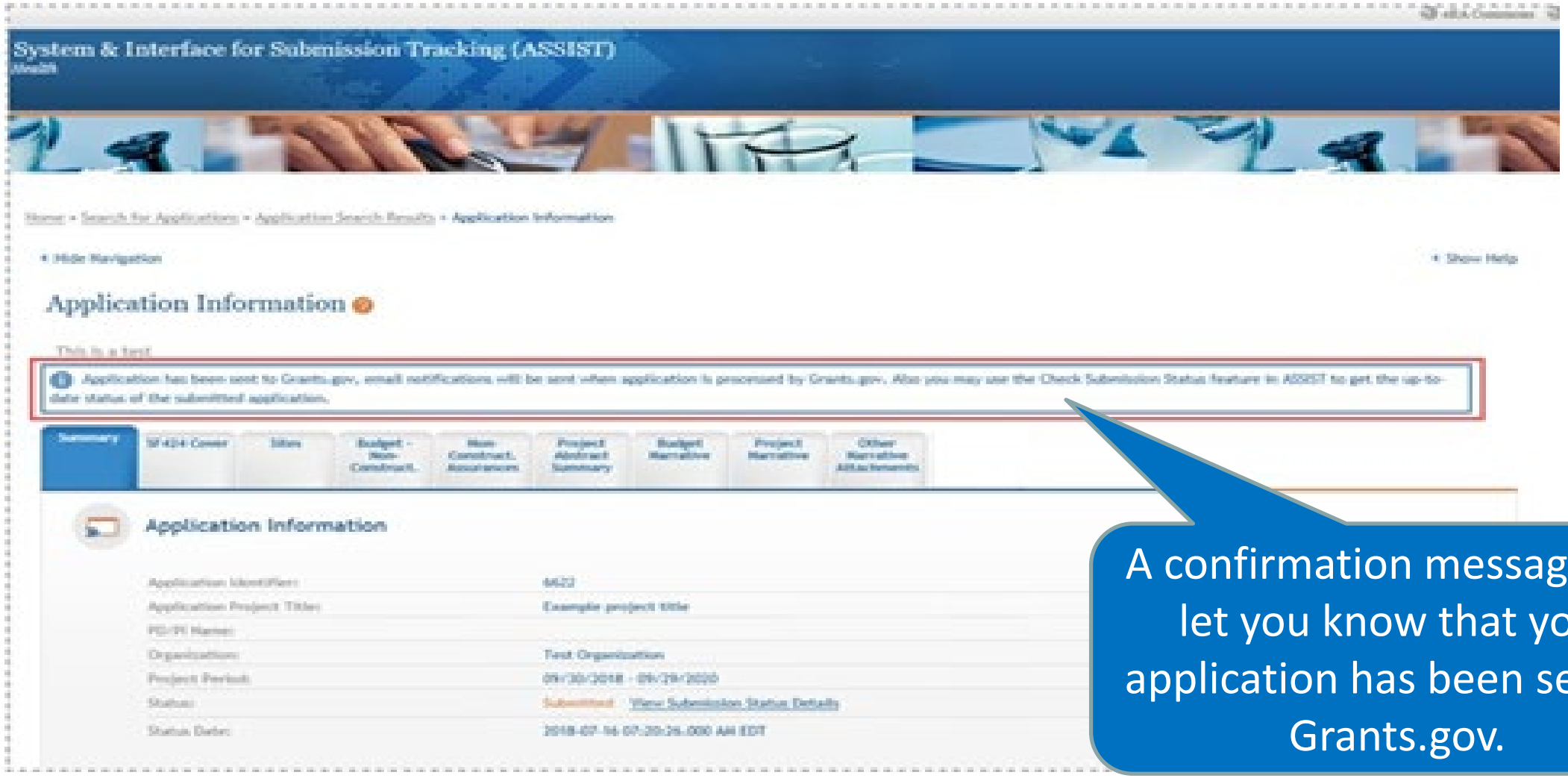
Submission Confirmation



A confirmation message will let you know that your application has been sent to Grants.gov.

Post-Submission Steps

Key Information

- Grants.gov may send status emails to the AOR submitting the application.
- You will receive status updates via email from eRA Commons.
- Emails from eRA Commons will go to two (2) email addresses:
  - The email address linked to the PD commons account listed on the SF424 Cover in section 4. Applicant Identifier.
  - The email address of the Business Official listed in the Authorized Representative section of the SF424.
- You MUST monitor your application status in case of any issues AND take action if necessary (e.g. correct validation errors).
- You can check on your application status in eRA Commons or in ASSIST. ASSIST and Commons status may update before you receive any system-generated email(s).

Checking Application Status in ASSIST (1 of 2)

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Application Information

Application Information

Application Identifier: 6622
Application Project Title: Example project title
PD/PI Name:
Organization: Test Organization
Project Period: 09/30/2018 - 09/29/2020
Status: Submitted View Submission Status Details
Status Date: 2018-07-16 07:20:26.000 AM EDT

FOA Information:

FOA Information: TI-18-123
Opportunity Title: Tribal Opioid Response Grants

Click View Submission Status Details when viewing your application in ASSIST

Example Opportunity Grant

Checking Application Status in ASSIST (2 of 2) SO view

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Application Information

Application Identifier:	6622
FOA Number:	TI-18-123 (Example only)
Project Title:	Example project title
PD/PI Name:	
Organization:	Test Organization
Submission Tracking #:	GRANT00696457
Last Status Check:	2018-07-16 07:34:07 AM

Check for Status Updates

ASSIST

Submission Date:	2018-07-16 07:20:21 AM
Submitting AOR:	Keysha Oliver
ASSIST Submission Status:	Submitted
Submission Status Date:	2018-07-16 07:20:26 AM

Grants.gov

Grant.gov Tracking #:	GRANT00696457
Grants.gov Received Date:	2018-07-16 07:20:25 AM
Grants.gov Processing Status:	Validated
Grants.gov Status Date:	2018-07-16 07:20:37 AM

Agency

Agency Tracking #:	To View Commons Post Submission Actions
Agency Status:	
Agency Status Date:	

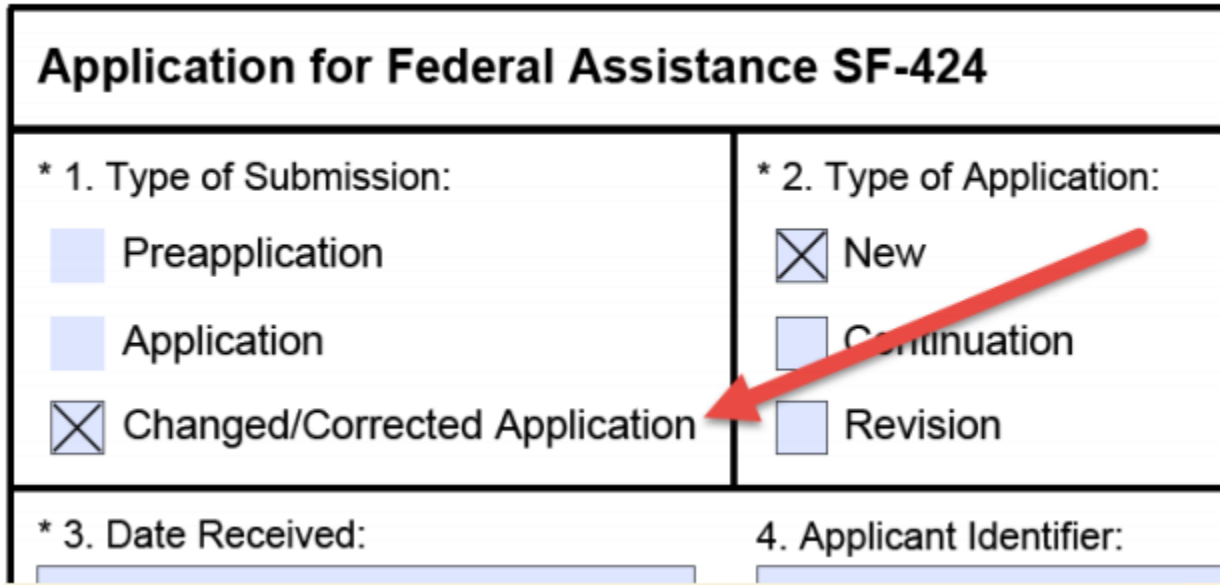
Close

Screen Rendered: 07/16/2018 08:08:51 AM | Screen Id: ASSIST0032@2289
Version: 2.29.03

Post Submission Actions are ONLY available to SO users. PD users are ONLY able to view application status details.

If Errors are Encountered

- If your application has errors, is not successfully submitted, or you make revisions you may resubmit a changed/corrected application before the application deadline.
- When updating/correcting/revising the application you need to select "Changed/Corrected Application" on the SF-424 Cover.



ASSIST or eRA Commons Contact Information

ASSIST or eRA Commons questions:

If you are using ASSIST or encounter issues in eRA Commons and need assistance, contact the eRA Service Desk at the numbers below:

- **Toll-free:** 1-866-504-9552 (Press 6 for the SAMHSA queue)
- **Phone:** 301-402-7469 (Press 6 for the SAMHSA queue)
- **Hours:** Mon-Fri, 7 a.m. to 8 p.m. Eastern Time (closed on federal holidays)
- https://grants.nih.gov/support/index.html

Grants.gov Contact Information

Grants.gov Applicant Support questions:

If you are using Grants.gov Workspace or encounter issues in Grant.gov and need assistance, contact the Grants.gov Applicant Support listed below:

- **Toll-free:** 1-800-518-4726
- **Email:** support@grants.gov

SAMHSA FOA Contact Information

If you have questions about either program issues, or grants management or budget issues, you can contact the agency staff listed in the FOA. You may find the agency contacts in Section VII. of the full FOA or on the SAMHSA webpage for the FOA.

Supplementary Information

Managing Access to Applications

Key Information

- SO users may manage access to applications including determining who can:
  - Edit, view, or have no access to parts of the application or the entire application
  - Update the application statuses
  - Manage other users' access to the application
  - The SO role is the only role that may submit applications. This access cannot be granted to PDs.
- By default, SOs of your organization will have full access to applications.
- By default, the initiator of the application and the Project Director entered on the FOA information pages will have access to edit the application but not update the access of other users.
- Users that cannot access ASSIST directly from eRA Commons can visit public.era.nih.gov/assist to access ASSIST.

PD and SO Role Differences in ASSIST

Signing Official (SO)	Project Director (using the PI role in Commons)
Can initiate applications	Can initiate applications
Can fill out applications	Can fill out applications they are listed on or initiated unless access is revoked
Can manage access to applications including adding or revoking privileges to PD users	Can manage access to applications if provided permission by an SO user
Can update application statuses	Can only update the status of applications they initiate, unless access is revoked
Can submit applications in 'Ready for Submission' status with Grants.gov Authorized Organization Representative (AOR) credentials	**Can NOT submit applications**

Managing Access to Applications

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U.S. Department of Health & Human Services

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Application Submission System & Interface for Submission Tracking (ASSIST)

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Username: JHSTAGESO

Actions

- MANAGE ACCESS
- ADD OPTIONAL FORM
- PREVIEW APPLICATION
- VALIDATE APPLICATION
- VIEW STATUS HISTORY
- UPDATE SUBMISSION STATUS
- COPY APPLICATION
- DELETE APPLICATION

Home > Search for Applications > Application Search Results > Application Information

Hide Navigation

Show Help

Application Information

This is a test

Summary | SF424 Cover

Application Information

Application Identifier:	6622
Application Project Title:	Example project title
PD/PI Name:	
Organization:	
Project Period:	
Status:	Work in Progress Submit Application
Status Date:	2018-07-12 05:01:00.000 PM EDT

User Access Summary

- If the PD initiates an application, there will only be one default row listed.
- SOs have full access even if not listed, or listed with less access. Here the SO user (JHSTAGESO) does not have Access Maintainer access, but is still able to manage access for other users.

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Application Submission System & Interface for Submission Tracking (ASSIST)
Sponsored by the National Institutes of Health

Username: JHSTAGESO

Actions

RETURN TO APPLICATION

Home > Search for Applications > Application Information > Access Summary

Hide Navigation

Show Help

User Access Summary

View Access History

Click on the User name to add access to other components for the user.

1 - 2 of 2 records, Page 1 of 1

User	Primary Organization	Project Role	Budget	Non-Budget	All	Access Maint	Status Maint
JHSTAGEPD	UNIVERSITY OF CALIFORNIA SAN DIEGO		None	None	Edit	N	N
JHSTAGESO	UNIVERSITY OF CALIFORNIA SAN DIEGO		None	None	Edit	N	Y

Add User

Default access for PD entered when initiating application

Default access for initiator of application

Editing Existing Users (1 of 2)

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Application Submission System & Interface for Submission Tracking (ASSIST)

Sponsored by the National Institutes of Health

Username: JHSTAGESO

Actions

RETURN TO APPLICATION

Home > Search for Applications > Application Information > Access Summary

Hide Navigation

Show Help

User Access Summary

View Access History

Click on the User name to add access to other components for the user.

1 - 2 of 2 records, Page 1 of 1

User	Primary Organization	Project Role	Budget	Non-Budget	All	Access Maint	Status Maint
JHSTAGEPD	UNIVERSITY OF CALIFORNIA SAN DIEGO		None	None	Edit	N	N
JHSTAGESO	UNIVERSITY OF CALIFORNIA SAN DIEGO		None	None	Edit	N	Y

Add User

Click a user in the User column

Editing Existing Users (2 of 2)

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Actions

RETURN TO APPLICATION

Home > Search for Applications > Application Search Results > Application Information > Access Summary > User Detail

Hide Navigation

Show Help

User Access Detail

User Information

View User Access History

User: JHSTAGEPD

Primary Organization: UNIVERSITY OF CALIFORNIA SAN DIEGO

To assign different access levels to Budget and Non-Budget data (e.g. View Budget and Edit Non-Budget), the Budget and Non-budget selections should be used. To assign the user the same access level for both Budget and Non-budget data, the All select should be used. The user will be given the highest level of access assigned in the selections made.

Project Role	Budget	Non-Budget	All	Access Maintainer	Status Maintainer
	None	None	Edit	☐	☐

Save | Revoke All Accesses | Cancel

Access Maintainer lets the user manage access for others

Manage access by adjusting each column and then click Save

Status Maintainer lets the user update the application status, or mark it Ready for Submission

Adding New Users

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Application Submission System & Interface for Submission Tracking (ASSIST)

Sponsored by the National Institutes of Health

Username: JHSTAGESO

Actions

RETURN TO APPLICATION

Home > Search for Applications > Application Information > Access Summary

Hide Navigation

Show Help

User Access Summary

View Access History

Click on the User name to add access to other components for the user.

1 - 2 of 2 records, Page 1 of 1

User	Primary Organization	Project Role	Budget	Non-Budget	All	Access Maint	Status Maint
JHSTAGEPD	UNIVERSITY OF CALIFORNIA SAN DIEGO		None	None	Edit	N	N
JHSTAGESO	UNIVERSITY OF CALIFORNIA SAN DIEGO		None	None	Edit	N	Y

Add User

Click Add User

Adding New Users

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U.S. Department of Health & Human Services

eRA Commons | Home | Logout | Service Desk | Contact Us

Application Submission System & Interface for Submission Tracking (ASSIST)
Sponsored by the National Institutes of Health

Username: JHSTAGESO

Home > Search for Applications > Application Search Results > Application Information > Access Summary > Add New User

Actions

- RETURN TO APPLICATION
- MANAGE ACCESS
- ADD OPTIONAL FORM
- VIEW STATUS HISTORY
- UPDATE SUBMISSION STATUS
- COPY APPLICATION
- DELETE APPLICATION

Hide Navigation | Show Help

Add New User

Look up an account by the username

USER INFORMATION

* Required field(s)

* Username: jhstagepd Submit

User: Director, Project

Primary Organization: UNIVERSITY OF CALIFORNIA SAN DIEGO

To assign different access levels to Budget and Non-Budget data (e.g. View Budget and Edit Non-Budget), the Bud... Non... To assign the user the same access level for both Budget and Non-budget data, the All select should be used. The user will be given the highest level of access assigned in the selections made.

Manage access using the columns

Project Role	Budget	Non-Budget	All	Access Maintainer	Status Maintainer
	None	None	Edit	☐	☐

Save | Cancel

Save the new accounts access, or cancel to not add any access

Adding and Removing Forms in ASSIST

Adding and Removing Forms

- You can add and remove Optional forms as needed in ASSIST. Once you add a form you will need to fill it out.
- The application displays all required forms as listed below:
  - SF424 Cover
  - Budget – Non-Construct.
  - Sites
  - Project Abstract Summary
  - Project Narrative
  - Budget Narrative
  - NonConstruct. Assurances
  - Other Narrative Attachments
- The optional Lobbying Disclosure form should be added and filled out if any individuals working on and receiving funding from the grant are part of any lobbying activities or associated with any lobbying.

Adding a Form in ASSIST (1 of 2)

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U.S. Department of Health & Human Services

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Application Submission System & Interface for Submission Tracking (ASSIST)
Sponsored by the National Institutes of Health

Username: JHSTAGESO

Actions

- MANAGE ACCESS
- ADD OPTIONAL FORM
- PREVIEW APPLICATION
- VALIDATE APPLICATION
- VIEW STATUS HISTORY
- UPDATE SUBMISSION STATUS
- COPY APPLICATION
- DELETE APPLICATION

Home > Search for Applications > Application Search Results > Application Information

Hide Navigation | Show Help

Application Information

This is a test

Summary | SF424 Cover

Application Information

Application Identifier:	6622
Application Project Title:	Example project title
PD/PI Name:	
Organization:	
Project Period:	
Status:	Work in Progress Submit Application
Status Date:	2018-07-12 05:01:00.000 PM EDT

Selecting a Form

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Application Submission System & Interface for Submission Tracking (ASSIST)
Sponsored by the National Institutes of Health

Add Optional Form

Select the form you wish to add

--- Select Form ---
Budget - Construct.
Budget - NonConstruct.
Budget Narrative
Construct. Assurances
Lobbying Disclosure
NonConstruct. Assurances
Other Narrative Attachments
Project Abstract Summary
Project Narrative
Sites

Submit Query

Select your form and click Submit Query to add it

Adding a Form in ASSIST (2 of 2)

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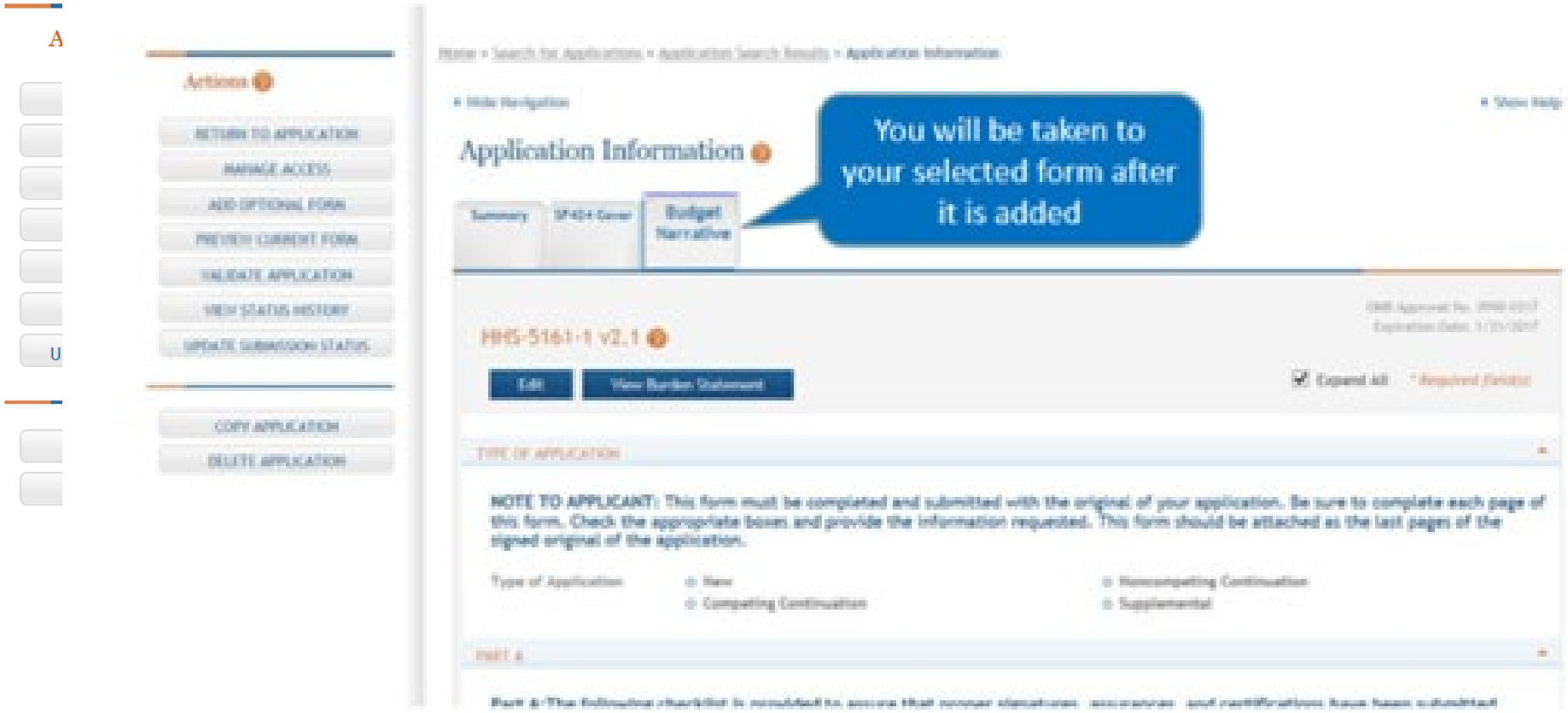

Removing Forms in ASSIST (1 of 2)

- You can remove forms if they are accidentally added
  - Note: Some required forms, such as the SF424 Cover, may not be removed.

Removing Forms in ASSIST (2 of 2)

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BY SIGNING THE FACE PAGE OF THIS APPLICATION, THE APPLICANT ORGANIZATION CERTIFIES THAT THE STATEMENTS IN THIS APPLICATION ARE TRUE, COMPLETE, AND ACCURATE TO THE BEST OF THE SIGNER'S KNOWLEDGE, AND THE ORGANIZATION ACCEPTS THE OBLIGATION TO COMPLY WITH U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES' TERMS AND CONDITIONS IF AN AWARD IS MADE AS A RESULT OF THE APPLICATION. THE SIGNER IS ALSO AWARE THAT ANY FALSE, FICTITIOUS, OR FRAUDULENT STATEMENTS OR CLAIMS MAY SUBJECT THE SIGNER TO CRIMINAL, CIVIL, OR ADMINISTRATIVE PENALTIES.

THE FOLLOWING ASSURANCES/CERTIFICATIONS ARE MADE AND VERIFIED BY THE SIGNATURE OF THE OFFICIAL SIGNING FOR THE APPLICANT ORGANIZATION ON THE FACE PAGE OF THE APPLICATION:

Civil Rights - Title VI of the Civil Rights Act of 1964 (P.L. 88-352), as amended, and all the requirements imposed by or pursuant to the HHS regulation (45 CFR part 80).

Handicapped Individuals - Section 504 of the Rehabilitation Act of 1973 (P.L. 93-112), as amended, and all requirements imposed by or pursuant to the HHS regulation (45 CFR part 84).

Sex Discrimination - Title IX of the Educational Amendments of 1972 (P.L. 92-318), as amended, and all requirements imposed by or pursuant to the HHS regulation (45 CFR part 86).

Age Discrimination - The Age Discrimination Act of 1975 (P.L. 94-135), as amended, and all requirements imposed by or pursuant to the HHS regulation (45 CFR part 91).

Debarment and Suspension - Title 2 CFR part 376.

Certification Regarding Drug-Free Workplace Requirements â Title 45 CFR part 82

Certification Regarding Lobbying - Title 32, United States Code, Section 1352 and all requirements imposed by or pursuant to the HHS regulation (45 CFR part 93).

Environmental Tobacco Smoke - Public Law 103-227.

Program Fraud Civil Remedies Act (PFCRA)

Save and Keep Lock | Save and Release Lock | Cancel and Release Lock | Remove Form

Scroll to the bottom of the form and click Remove Form

 | Screen Rendered: 07/13/2018 01:00:37 EDT | Screen Id: ASSIST0078@2289 | Version: 2.29.03

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