Substance Abuse and Mental Health Services Administration (SAMHSA)

Funding Opportunity Announcement (FOA) Applicant Webinar
Contents:

- Registration – slide 3
- Creating a PD account – slide 28
- Applying to FOAs – slide 48
- Accessing in-progress applications in ASSIST – slide 56
- Filling out applications in ASSIST – slide 62
- Validating your application and updating statuses in ASSIST – slide 75
- Submitting applications in ASSIST – slide 83
- Post-submission steps – slide 88
- Supplementary information not covered during webinar – slide 96
  - Managing access to applications in ASSIST – slide 97
  - Adding and removing forms in ASSIST – slide 106
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
1. Dun and Bradstreet Universal Numbering System (DUNS)
   - [http://www.dnb.com](http://www.dnb.com) or call 1-866-705-5711

2. System for Award Management (SAM)
   - [https://www.sam.gov](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
3. Grants.gov

- Must complete DUNS and SAM registrations prior to starting process of registering in grants.gov
- 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).
4. eRA Commons

- The organization MUST register in eRA Commons to submit a grant application.
  - [https://era.nih.gov/reg_accounts/register_commons.cfm](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.
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.**
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SO = SAMHSA Business Official (BO)</strong></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If you are submitting your application through eRA ASSIST, the BO listed on the SF424 section 21. <strong>AUTHORIZED REPRESENTATIVE</strong> must have the SO role in Commons.</td>
</tr>
<tr>
<td><strong>PI = SAMHSA Project Director (PD)</strong></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>The SAMHSA Project Director listed on the application must have an account with the PD/PI role in eRA Commons.</td>
</tr>
<tr>
<td></td>
<td>The eRA Commons Username of your SAMHSA Project Director is entered in #4 Applicant Identifier on the SF424.</td>
</tr>
</tbody>
</table>
Registering an Organization in eRA Commons
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.

1. **SO completes Registration Form.**
2. *SO will receive an email confirming the registration. **SO must click on the confirmation link in the email within 48 hours.**
3. NIH verifies the registration request and sends an email with the result either approved or rejected.
4. If rejected, **SO will be required to restart the process.** Be sure to correct the issues noted in the rejected email.
5. If approved, **SO clicks the link provided in the email within 48 hours to confirm the information.**
6. Once confirmed, SO is sent 2 separate emails. One email will have their account information and the other email will have their temporary password. Password expires after 48 hours.
7. **SO logs into Commons with the account information and temporary password. They are required to change their temporary password.**
8. SO reviews and “Accepts” the registration.
Accessing the eRA Registration Form

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.

Registered 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
- Edition
- National Institutes of Health
- Public Access Policy Page
- Loan Repayment Program
- Commons Quick Queries
Accessing the eRA Registration Form

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]
You must verify your DUNS number before entering institution information.
Entering an Accounts Administrator is optional

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


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 Verified

The email for [TESTOR0SOJ] 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.
Email with Registration Status (Rejected)

The NIH is unable to approve your institution registration request. 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/
Your institution registration has been approved.

era-notify-test@mail.nih.gov

to me

Jul 5 (3 days ago)  

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.

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

IPF Assignment View

<table>
<thead>
<tr>
<th>Registration Institution Name:</th>
<th>TEST ORGANIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NIH Institution Name:</td>
<td>TEST ORGANIZATION</td>
</tr>
<tr>
<td>Request Date:</td>
<td>2016-07-05 10:33:04.0</td>
</tr>
</tbody>
</table>

Confirm Institution Registration

- [ ] yes
- [x] no

[Privacy Act Statement | Accessibility | Disclaimer]

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

Department of Health and Human Services

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Screen Rendering: 07/11/2018 02:58:50 EDT
Screen Size: 3.36.4
eRA Commons: Notification of Authentication Credentials and New eRA Account

**era-notify-test@mail.nih.gov**
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](http://grants.nih.gov/support) for additional methods of contact. Please access Commons at [http://public.era.nih.gov/commons/](http://public.era.nih.gov/commons/).

For more information please visit [http://era.nih.gov/](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

Welcome to the Commons

System Notification Message
All systems are currently available.
Note: Commons and eRA 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
- 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.
Change Your Password

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

ℹ️ 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:

************

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

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

<table>
<thead>
<tr>
<th>Institution Name:</th>
<th>TEST ORGANIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAX Received:</td>
<td>No</td>
</tr>
<tr>
<td>DUNS Number:</td>
<td>0000000000</td>
</tr>
<tr>
<td>Street 1:</td>
<td>123 STREET</td>
</tr>
<tr>
<td>Street 2:</td>
<td></td>
</tr>
<tr>
<td>Street 3:</td>
<td></td>
</tr>
<tr>
<td>Street 4:</td>
<td></td>
</tr>
<tr>
<td>ZIP Code:</td>
<td>20873</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institution Information</th>
<th>Institution Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closeout Email:</td>
<td></td>
</tr>
<tr>
<td>NoA Email:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>BETHESDA</td>
</tr>
<tr>
<td>State:</td>
<td>MD</td>
</tr>
<tr>
<td>Country:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Principal Signing Official</th>
<th>Accounts Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Prefix:</td>
<td>Name Prefix:</td>
</tr>
<tr>
<td>First Name:</td>
<td>First Name:</td>
</tr>
<tr>
<td>Middle Name:</td>
<td>Middle Name:</td>
</tr>
<tr>
<td>Last Name:</td>
<td>Last Name:</td>
</tr>
<tr>
<td>Suffix:</td>
<td>Suffix:</td>
</tr>
<tr>
<td>Title:</td>
<td>Title:</td>
</tr>
<tr>
<td>User Name:</td>
<td>User Name:</td>
</tr>
<tr>
<td>Phone:</td>
<td>Phone:</td>
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<tr>
<td>Fax:</td>
<td>Fax:</td>
</tr>
<tr>
<td>Email:</td>
<td>Email:</td>
</tr>
</tbody>
</table>

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.
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.
Creating a PD/PI Account in eRA Commons
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.
Navigate to eRA Commons at [https://public.era.nih.gov/commons](https://public.era.nih.gov/commons)
SO: Navigate to Account Management

1) Select Admin

2) Select Accounts

3) Select Account Management
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

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

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

User Information
- User Type: Commons
- User ID: ENTERPRISE
- Primary Organization: Monroe County Public Health Department

Contact Information
- Last Name: Kirk
- First Name: James
- Email: eRATest@od.nih.gov
- Confirm Email: eRATest@od.nih.gov
Review the list of organizations and determine if your organization is listed.

<table>
<thead>
<tr>
<th>Role(s)</th>
<th>Organization(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>ABC University</td>
</tr>
<tr>
<td>PI</td>
<td>DEF University</td>
</tr>
<tr>
<td>PI</td>
<td>GHI University</td>
</tr>
</tbody>
</table>
SO: Determine the Appropriate Scenario

Scenario 1
PD already has an account that is affiliated to the SO’s organization

Next Steps: No action required

Scenario 2
PD already has an account with the PI role that is NOT affiliated to the SO’s organization

Next Steps: Affiliate existing account

Scenario 3
PD does NOT have an account

Next Steps: Create a new account
Scenario 2 – Affiliating an Existing Account With The PI Role To Your Organization
### Scenario 2

**SO: Affiliate Account to Organization**

#### Search Results

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
<th>Email</th>
<th>Account Status</th>
<th>Roles &amp; Affiliations</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENTERPRISE</td>
<td>Kirk, James</td>
<td><a href="mailto:eRATest@od.nih.gov">eRATest@od.nih.gov</a></td>
<td>Active</td>
<td>ABC University</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>DEF University</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GHI University</td>
</tr>
</tbody>
</table>

- **Click Manage**

**Create New Account**
### Scenario 2

**Select Affiliate** under the Roles section.

<table>
<thead>
<tr>
<th>Role(s)</th>
<th>Organization(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>ABC University</td>
</tr>
<tr>
<td>PI</td>
<td>DEF University</td>
</tr>
<tr>
<td>PI</td>
<td>GHI University</td>
</tr>
</tbody>
</table>
**Scenario 2**

**SO: Select PI Role**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Role(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starfleet Academy</td>
<td>GRADUATE_STUDENT - Graduate Student</td>
</tr>
<tr>
<td></td>
<td>PACR - Public Access Compliance</td>
</tr>
<tr>
<td></td>
<td>PI - Principal Investigator</td>
</tr>
<tr>
<td></td>
<td>POSTDOC - POSTDOC</td>
</tr>
<tr>
<td></td>
<td>PROJECT_PERSONNEL - Project Personnel</td>
</tr>
<tr>
<td></td>
<td>SCIENTIST - Scientist</td>
</tr>
<tr>
<td></td>
<td>SO - Signing Official</td>
</tr>
<tr>
<td></td>
<td>SPONSOR - Sponsor Users</td>
</tr>
<tr>
<td></td>
<td>TRAINEE - Trainee</td>
</tr>
<tr>
<td></td>
<td>UNDERGRADUATE - Undergraduate</td>
</tr>
</tbody>
</table>

Select PI – Principal Investigator from the dropdown menu.
### Scenario 2

**Roles**

<table>
<thead>
<tr>
<th>Role(s)</th>
<th>Organization(s)</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>Starfleet Academy</td>
<td>Remove</td>
</tr>
<tr>
<td>PI</td>
<td>ABC University</td>
<td></td>
</tr>
<tr>
<td>PI</td>
<td>DEF University</td>
<td></td>
</tr>
<tr>
<td>PI</td>
<td>GHI University</td>
<td></td>
</tr>
</tbody>
</table>

**View results**

- Select
- Save
- Cancel

**Save**
Scenario 3 – Creating a New PD Account
Scenario 3

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

Select Create New Account

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
- noha

Email

Confirm Email

Roles

Select Add Roles

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.
Scenario 3

Select PI Role

Select PI – Principal Investigator Role

Select Add Role(s)
Scenario 3

SO: View and Create

Select Create

Note: You are also able to remove roles accidentally added.
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
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).
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.
Click on the ASSIST Tab on the menu bar.
Initiating an Application in ASSIST

Enter the FOA number
FoA Information (1 of 2)

An Initiate Application Screen will appear with pre-filled FoA information.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Open Date:</td>
<td>06/21/2018</td>
</tr>
<tr>
<td>Opportunity Close Date:</td>
<td>08/20/2018</td>
</tr>
<tr>
<td>Agency Contact:</td>
<td><a href="mailto:Example@samhsa.hhs.gov">Example@samhsa.hhs.gov</a></td>
</tr>
<tr>
<td>Application Identifier:</td>
<td></td>
</tr>
<tr>
<td>Application Project Title</td>
<td>UNIVERSITY OF CALIFORNIA SAN DIEGO <em>(describe title in 200 characters)</em></td>
</tr>
<tr>
<td>Lead Applicant Organization:</td>
<td>UNIVERSITY OF CALIFORNIA SAN DIEGO</td>
</tr>
<tr>
<td>Lead Applicant Organization Address:</td>
<td>OFFICE OF CONTRACT &amp; GRANT ADMIN, 0934</td>
</tr>
<tr>
<td>Lead Organization DUNS:</td>
<td>8D435579000000</td>
</tr>
<tr>
<td>SAM Registration Expiration Date:</td>
<td>02/23/2019</td>
</tr>
</tbody>
</table>

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.
To be able to easily find your application later remember to write down your Application Identifier.
Accessing In-Progress Applications in ASSIST
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
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 for Application Results

<table>
<thead>
<tr>
<th>Application Identifier</th>
<th>Application Project Title</th>
<th>Agency</th>
<th>PD/PI Name</th>
<th>Lead Applicant Organization</th>
<th>Submission Status</th>
<th>Submission Date</th>
<th>Project Start Date</th>
<th>Project End Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6622</td>
<td>Example project title</td>
<td>SAMHSA</td>
<td></td>
<td>UNIVERSITY OF CALIFORNIA SAN DIEGO</td>
<td>Work In Progress</td>
<td></td>
<td></td>
<td></td>
<td>Select</td>
</tr>
</tbody>
</table>

Select the application you would like to view.
You will be taken to the Application Information page.
Filling out Applications in ASSIST
Required and Optional Forms on Grants.gov
ASSIST and Grants.gov Workspace require the same forms although the label names may be different

* indicates an optional form

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

- **Invalid Congressional District**
  - To look up the Congressional Districts, you can visit [http://www.house.gov](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

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

**SECTION B - BUDGET CATEGORIES**

<table>
<thead>
<tr>
<th>Object Class Categories</th>
<th>1. (1) TI-18-016 - Federal</th>
<th>2. (2)</th>
<th>3. (3)</th>
<th>4. (4)</th>
<th>5. (5) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Personnel</td>
<td>$80,000.00</td>
<td></td>
<td></td>
<td>$80,000.00</td>
<td></td>
</tr>
<tr>
<td>b. Fringe Benefits</td>
<td>$30,000.00</td>
<td></td>
<td></td>
<td>$30,000.00</td>
<td></td>
</tr>
<tr>
<td>c. Travel</td>
<td>$21,000.00</td>
<td></td>
<td></td>
<td>$21,000.00</td>
<td></td>
</tr>
<tr>
<td>d. Equipment</td>
<td>$26,000.00</td>
<td></td>
<td></td>
<td>$26,000.00</td>
<td></td>
</tr>
<tr>
<td>e. Supplies</td>
<td>$7,000.00</td>
<td></td>
<td></td>
<td>$7,000.00</td>
<td></td>
</tr>
<tr>
<td>f. Contractual</td>
<td>$0.00</td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>g. Construction</td>
<td>$0.00</td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>h. Other</td>
<td>$81,500.00</td>
<td></td>
<td></td>
<td>$81,500.00</td>
<td></td>
</tr>
<tr>
<td>i. Total Direct Charges (sum of 6a-6h)</td>
<td>$247,500.00</td>
<td></td>
<td></td>
<td>$247,500.00</td>
<td></td>
</tr>
<tr>
<td>j. Indirect Charges</td>
<td>$0.00</td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>k. TOTALS (sum of 6i and 6j)</td>
<td><strong>$247,500.00</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Income</td>
<td>$0.00</td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Section A Total must equal Section B Total.

**Section A Total:** $247,500.00

**Section B Total:** $247,500.00

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

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

**Complete only this column Federal (e)**

**All totals in the circles must match**

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

**Cost Sharing/Match Required?: No**

**Sample SF424 A Budget: Match Not Required Federal FOA**
**Sample SF424 A Budget: Match Not Required Federal FOA**

**Cost Sharing/Match Required?: No**

### Section C - Non-Federal Resources

<table>
<thead>
<tr>
<th>(a) Grant Program</th>
<th>(b) Applicant</th>
<th>(c) State</th>
<th>(d) Other Sources</th>
<th>(e) TOTALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. TI-18-016 - Federal</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>9.</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>10.</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>11.</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>12. TOTAL (sum of lines 8-11)</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

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

### Section D - Forecasted Cash Needs

- **Total for 1st Year:** $247,500.00
  - 1st Quarter: $61,875.00
  - 2nd Quarter: $61,875.00
  - 3rd Quarter: $61,875.00
  - 4th Quarter: $61,875.00

### Section E - Budget Estimates of Federal Funds Needed for Balance of the Project

**FUTURE FUNDING PERIODS (Years)**

- (a) Grant Program
- (b) First
- (c) Second
- (d) Third
- (e) Fourth

<table>
<thead>
<tr>
<th>16. TI-18-016 - Federal</th>
<th>$247,500.00</th>
<th>$0.00</th>
<th>$0.00</th>
<th>$0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. TOTAL (sum of lines 16-19)</td>
<td>$247,500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### Section F - Other Budget Information

- 21. Direct Charges: $0.00
- 22. Indirect Charges: $0.00
- 23. Remarks: 

*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.*

---

**Section C is not applicable (match not required)**

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

**Show funds allocation per quarter.**

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

**Federal funds needed for 2nd budget period**

**Section F is optional**
Sample SF424 A Budget: Match Required

(Match Ratio is 3:1)

**SECTION A: BUDGET SUMMARY**

<table>
<thead>
<tr>
<th>Grant Program Function or Activity (a)</th>
<th>Catalog of Federal Domestic Assistance Number (b)</th>
<th>Estimated Unobligated Funds</th>
<th>New or Revised Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>SM-18-005 - Federal</td>
<td>93.243</td>
<td>Federal (c)</td>
<td>$247,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Non-Federal (d)</td>
<td>$82,500</td>
</tr>
<tr>
<td>SM-18-005 - Non-Federal</td>
<td></td>
<td>Federal (c)</td>
<td>$247,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Non-Federal (d)</td>
<td>$82,500</td>
</tr>
<tr>
<td>1. Totals</td>
<td></td>
<td>$330,000</td>
<td>$330,000</td>
</tr>
</tbody>
</table>

**SECTION B: BUDGET CATEGORIES**

<table>
<thead>
<tr>
<th>6. Object Class Categories</th>
<th>(1) SM-18-005 - Federal</th>
<th>(2) SM-18-005 - Non-Federal</th>
<th>Total (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>$80,000.00</td>
<td>$80,000.00</td>
<td>$160,000</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>$30,000.00</td>
<td>$30,000.00</td>
<td>$60,000</td>
</tr>
<tr>
<td>Travel</td>
<td>$21,000.00</td>
<td>$21,000.00</td>
<td>$42,000</td>
</tr>
<tr>
<td>Equipment</td>
<td>$28,000.00</td>
<td>$28,000.00</td>
<td>$56,000</td>
</tr>
<tr>
<td>Supplies</td>
<td>$7,000.00</td>
<td>$2,500.00</td>
<td>$9,500</td>
</tr>
<tr>
<td>Contractual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Charges (sum of 6a-6h)</td>
<td>$247,500</td>
<td>$82,500</td>
<td>$330,000</td>
</tr>
<tr>
<td>Indirect Charges</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTALS (sum of 6i and 6j)</td>
<td>$247,500</td>
<td>$82,500</td>
<td>$330,000</td>
</tr>
<tr>
<td>Program Income</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
- Section A Totals must equal Section B Totals
- Use the "New or Revised Budget" section for New Applications and Continuations
- Use the first row only (Line 1) to report Total Federal Funds for the 1st Year of project only
- Use the second row only (Line 2) to report Total Non-Federal Match for the First Year of project only
- 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

**Additional Instructions:**
- On row 1 input: FOA# - Federal (e.g. SM-18-005 - Federal)
- On row 2 input: FOA# - Non-Federal (e.g. SM-18-005 - Non-Federal)
- Enter the CFDA # from the 1st page of the FOA
- This section “Estimated Unobligated Funds: columns = Federal (c) and Non-Federal (d) are not applicable
- Use column (1) for the Federal Requested
- Total Federal Requested
- Total Non-Federal Match Reported
Sample SF424 A Budget: Match Required

### Section C - Non-Federal Resources

<table>
<thead>
<tr>
<th>Grant Program</th>
<th>Applicant</th>
<th>State</th>
<th>Other Sources</th>
<th>TOTALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SM-18-005 - Federal</td>
<td>$82,500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$82,500.00</td>
</tr>
<tr>
<td>SM-18-005 - Non-Federal</td>
<td>$82,500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$82,500.00</td>
</tr>
</tbody>
</table>

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

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

**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

<table>
<thead>
<tr>
<th></th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>$61,875.00</td>
<td>$61,875.00</td>
<td>$61,875.00</td>
<td>$61,875.00</td>
</tr>
<tr>
<td>Non-Federal</td>
<td>$20,625.00</td>
<td>$20,625.00</td>
<td>$20,625.00</td>
<td>$20,625.00</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$82,500.00</td>
<td>$82,500.00</td>
<td>$82,500.00</td>
<td>$82,500.00</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Grant Program</th>
<th>1st Year</th>
<th>2nd Year</th>
<th>3rd Year</th>
<th>4th Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>SM-18-005 - Federal</td>
<td>$247,500.00</td>
<td>$247,500.00</td>
<td>$247,500.00</td>
<td>$247,500.00</td>
</tr>
<tr>
<td>SM-18-005 - Non-Federal</td>
<td>$82,500.00</td>
<td>$82,500.00</td>
<td>$82,500.00</td>
<td>$82,500.00</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Remarks:</th>
<th>Section F is optional</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
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.
Validating Applications and Updating Statuses in ASSIST
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.
Errors MUST be corrected in order to submit.

You may submit with Warnings if needed.

Application Errors and Warnings Results

Application Information

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

**Errors**

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

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget - NonConstruct.</td>
<td>The SECTION B - Budget Categories: k. TOTALS Total (6) does not equal to SECTION A - Budget Summary: 5. TOTALS Total (6). (026.43.2)</td>
</tr>
<tr>
<td>Budget - NonConstruct.</td>
<td>The Federal total for 1st year, in Section B - Forecasted Needs, does not equal the Section A, New or Revised Budget Federal Totals (c-5) amount. (026.58.2)</td>
</tr>
<tr>
<td>Budget - NonConstruct.</td>
<td>The SECTION D - Forecasted Cash Needs: 15. TOTAL does not equal to SECTION A - Budget Summary: 5. TOTALS Total (4). (006.62.1)</td>
</tr>
</tbody>
</table>

**Warnings**

Total Warnings to be corrected at Applicant discretion: 1

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Warning Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget - NonConstruct.</td>
<td>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). (026.29.2)</td>
</tr>
</tbody>
</table>
If all validations pass, your application is ready to be submitted.
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.
Enter a comment and click Add comment to update the status if validations pass.
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.
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
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).
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.
Enter Grants.gov AOR credentials for your organization and click Enter to submit your application.
A confirmation message will let you know that your application has been sent to Grants.gov.
Post-Submission Steps
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).
Click View Submission Status Details when viewing your application in ASSIST
Post Submission Actions are ONLY available to SO users. PD users are ONLY able to view application status details.
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 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](https://grants.nih.gov/support/index.html)
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
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
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.
<table>
<thead>
<tr>
<th>Signing Official (SO)</th>
<th>Project Director (using the PI role in Commons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can initiate applications</td>
<td>Can initiate applications</td>
</tr>
<tr>
<td>Can fill out applications</td>
<td>Can fill out applications they are listed on or initiated unless access is revoked</td>
</tr>
<tr>
<td>Can manage access to applications including adding or revoking privileges to PD users</td>
<td>Can manage access to applications if provided permission by an SO user</td>
</tr>
<tr>
<td>Can update application statuses</td>
<td>Can only update the status of applications they initiate, unless access is revoked</td>
</tr>
<tr>
<td>Can submit applications in ‘Ready for Submission’ status with Grants.gov Authorized Organization Representative (AOR) credentials</td>
<td>Can NOT submit applications</td>
</tr>
</tbody>
</table>
Managing Access to Applications

Application Information

This is a test

Application Information

- Application Identifier: 6672
- Application Project Title: Example project title
- PD/PI Name:
- Organization:
- Project Period:
- Status: Work In Progress
- Status Date: 2018-07-12 05:01:00.000 PM EDT

Update Submission Status

Copy Application

Delete Application
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.
Click a user in the User column
Manage access by adjusting each column and then click Save.

Access Maintainer lets the user manage access for others.

Status Maintainer lets the user update the application status, or mark it Ready for Submission.
Adding New Users

Click Add User
Adding New Users

Look up an account by the username

Manage access using the columns

Save the new accounts access, or cancel to not add any access
Adding and Removing Forms in ASSIST
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)

Application Information

This is a test

Summary

Application Information

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

Select your form and click Submit Query to add it.
Adding a Form in ASSIST (2 of 2)

You will be taken to your selected form after it is added.
You can remove forms if they are accidentally added

- Note: Some required forms, such as the SF424 Cover, may not be removed.
Scroll to the bottom of the form and click Remove Form.