

Terms Tracking Reference Sheet

This reference sheet provides:

1. A brief overview of the View Terms Tracking Details page in eRA Commons; and
2. How to respond to a tracked term and condition, as stated in the Notice of Award (NOA).

Identifying Tracked Terms

- A tracked term requires documentation to be submitted to SAMHSA through the eRA Commons Terms Tracking system. Your Notice of Award will contain terms and conditions, some of which may require a response. To identify which terms are tracked, please check the **View Terms Tracking Details** page. Any tracked term and condition will show a date in the Next Due Date column next to the term's name.
 - Note: Terms or conditions that are not tracked will show a status of "Not Tracked".
- The Project Director (PD) and Business Official (BO) will receive automated email notifications 30 days before tracked terms are due, if they require submission through the View Terms Tracking Details page.

Accessing the View Terms Tracking Details page

1. Log into eRA Commons (<https://public.era.nih.gov/commons>) with your username and password.
2. Access the **Status** tab.
 - a. If you have the Signing Official (**SO**) role, search for the appropriate grant by inputting search criteria.
 - b. If you have the Principal Investigator (**PI**) role, select **List of Applications/Grants**.
3. Select **View Terms Tracking** in the Action column to access the View Terms Tracking Details page.
 - a. For an overview of the View Terms Tracking Details page, please see the appendix of this reference sheet.

Selecting the applicable term and submitting materials

You must have a SO account associated with the grantee organization or be the PD of a grant to submit documentation through the View Terms Tracking Details page.

1. Ensure you are viewing the correct tab with the budget period matching the term to which you are responding. If you are not viewing the correct tab, select the correct budget period tab.
2. Click on the **plus** icon (+) to expand a term.
3. Under the Actions menu, select **Prepare Documentation**.
4. **Upload** up to 10 PDF files and enter comments.
 - a. **Note:** You may submit a response that consists of only a comment with no files, only uploaded files and no comment, or both.
 - b. Each file may be no larger than 6 MB.
 - c. You may preview your entire submission using the **Preview** button, or view individual files using the **View** button next to the file.

5. Click **Submit** to submit your response.
 - a. You will receive an email confirmation of receipt at the end of the day. See Email Notifications in the appendix for more information.
 - b. Your task submission status will update to Submitted.
6. Under the Actions menu, select **View Submission** to view a consolidated PDF of all your submitted documents for a specific task.

What happens next?

Federal staff will review your submission to determine if the materials submitted have satisfied the requirements for the term. Then either:

1. Your task status will be updated to **“Resolved”**, and a revised Notice of Award may be issued; or
2. You will receive an email notifying you that the term is not resolved and is **“Returned”**, and that you will need to submit additional or revised materials.

Revising documentation

To revise your documentation after it is placed in **“Returned”** status by federal staff:

1. Access **View Terms Tracking Details**.
2. Click on the **Plus** icon (+) to expand a term.
3. Under the Actions menu, select **Revise Documentation**.
4. Revise your files by using the **Delete** button to remove existing files, if needed, or click **Upload** to add new files.
5. Click **Submit** to submit your revised documentation.

Appendix

[View Terms Tracking Details page](#)

The View Terms Tracking Details page contains two sections. The first contains summary information about the grant as well as the current assignments for Grant Specialist, Program Official, Program Director/Principal Investigator, and Business Official.

The second section contains information about terms and conditions, sorted by the budget period for which each term was set up. Several columns of information are displayed for each term and condition:

- **Term Name:** The name of the term or condition placed on the grant award. Click on a term name to see the full term contents.
- **Award Number:** The specific grant award the term was placed on.
- **Next Due Date:** The next date on which a response to the term will be due. If there are no upcoming due dates, the most recent due date will be displayed.
- **Next Task Description:** A description of the task with the first upcoming due date. If there is no upcoming due date, the description of the task with the most recent due date will be displayed.
- **Next Submission Date:** The date documentation was submitted for the task shown in the Next Task Description column, if applicable.
- **Next Removal Date:** The date the task shown in the Next Task Description column was marked as resolved by federal staff, if applicable.

- **Next Due Date Status:** The status of the task shown in the Next Task Description column. See page 3 for a list of **Due Date statuses**.

The expanded view which appears after clicking on the **plus icon (+)** for a specific term displays tasks belonging to that term with different column headings:

- **Due Date:** The date documentation from the grantee is due.
- **Task Description:** The grantor provided task description or detailed description of the tracked term.
- **Due Date Status:** The status of the due date. See page 3 for a list of **Due Date statuses**.
- **Submission Status:** The status of the submission. See page 3 for a list of **Submission statuses**.
- **Submission Date:** The date when documentation was submitted, if applicable.
- **Removal Date:** The date the task was marked as removed by federal staff.
- **Grantee Attachments/Comments:** Files and comments used for term documentation.
- **Actions:** A dynamic list of actions you may take that changes based on task statuses.

Due Date Statuses

- **Not Tracked:** Being 'Tracked' means you are required to submit requested information via the View Terms Tracking Details page by a certain due date. A status of 'Not Tracked' means the term is not set up to receive submissions on the View Terms Tracking Details page. Consult the full term contents to determine if submission is required elsewhere.
- **Unresolved:** The task has not yet been marked as resolved by federal staff, either because you have not submitted documentation, SAMHSA has not begun to review your submission, or your submission was returned to allow for additional documentation.
- **In-Review:** SAMHSA federal staff are reviewing your documentation for the task.
- **Resolved:** Your submitted documentation satisfied the term or condition, and SAMHSA federal staff have marked it resolved.
- **Archived (Unresolved):** The task has not yet been marked as Resolved by federal staff and the budget period during which a response was due has expired.
- **Closed:** The task has been closed. No further changes or submissions to the task are allowed or required, but this does not mean the task was resolved.

Submission Statuses

- **No Submissions:** No submissions have been made and there is no draft documentation.
- **In Progress:** No submissions have been made but there is a draft in progress.
- **Submitted:** Documentation has been submitted to SAMHSA.
- **Returned:** SAMHSA federal staff have returned documentation to allow for changes.
- **Returned (In-Progress):** Revisions to returned term documentation are in-progress.

Email notifications

Email notifications are sent to the Project Director and Business Official assigned to the grant and will include relevant information such as the Grant or Award number, Term Name, and Term Due Date. You can expect to receive emails for the following events:

- **Submission:** A receipt email confirming any submission made was received by federal staff. Generated at night with all submission confirmations for the day in one consolidated email.

- **In Review:** Email informing you that federal staff have begun to review your submission, and that the Due Date Status has changed to In-Review
- **Return Submission:** Email informing you a submission has been returned to you for revisions.
- **30-day warning:** Email informing you of any upcoming unresolved due dates that fall within 30 calendar days.
- **Late:** Email informing you of any missed due dates.
- **30-day Late:** Email informing you of any missed due dates by 30 calendar days.
- **Closed:** Email informing you that a tracked term's Due Date Status has been changed to Closed.

Contacts:

- **Budget and grant-specific questions:** contact your assigned Grants Management Specialist (GMS)
- **Program-related questions:** contact your assigned Grants Project Officer (GPO)
- **Technical questions:** contact the eRA Service Desk

Web: [eRA Service Desk Support](#)

Toll-free: 1-866-504-9552, option 6 for SAMHSA queue

Phone: 301-402-7469, option 6 for SAMHSA queue

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