

# Getting Started: Preparing Your Single-project Application Using ASSIST

## Step-by-Step



### Before you begin: Know where to go for help

- The eRA Commons Help Desk is ready to help you if you have any problems using ASSIST
  - <http://grants.nih.gov/support/index.html>



### Step 1: Find a Funding Opportunity Announcement (FOA)

- Find a FOA of interest in the NIH Guide for Grants & Contracts and record the FOA number (e.g., PA-16-123)
  - <http://grants.nih.gov/grants/guide/index.html>
- If ASSIST is a submission option for your chosen FOA, there will be an 'Apply Online Using ASSIST' button just above the FOA Table of Contents that will take you to the ASSIST system



### Step 2: Make a submission plan

- Decide who will be responsible for data entry in ASSIST and gather their eRA Commons IDs



### Step 3: Login to ASSIST & Initiate Your Application

- Login to ASSIST at <https://public.era.nih.gov/assist> using your eRA Commons account
- Use the **Initiate Application** feature and your FOA number to get started on your application
  - Or, access applications already in progress using the **Search** feature



### Step 4: Provide application access to your team

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



### Step 5: Enter Application Data

- Use the tabs across the top of the screen to move between forms
- Complete the R&R Cover tab first (forward populates information to other forms)
- Multiple users can simultaneously work on your application, but only one user at a time can Edit an individual form
- Use the **Validate Application** action to check your entered data against NIH business rules



### Step 6: Finalize your application and prepare for submission

- Use the **Preview Application** action to generate a draft application image in the agency format
- Check the application image for any assembly issues
- Use the **Update Submission Status** action to change your application from *Work In Progress* status to *Ready for Submission* status
  - If additional edits are needed, the application must be returned to *Work In Progress* status



### Step 7: Submit your application

- Use the **Submit** button on the Summary tab to submit to the agency through Grants.gov
  - Only active for users logged into ASSIST with an eRA Commons account with the SO role
- Provide your valid Grants.gov Authorized Organizational Official credentials when prompted



### Step 8: Track your application status and view your assembled application image

- Use the **View Submission Status Details** link to track your application status
  - If your application successfully processed through to eRA Commons, the Agency Tracking # (e.g., AN1234567) will be hyperlinked to the eRA Commons detailed status screen
  - Carefully check your assembled application image (e-Application) and associated documents in the Other Relevant Documents section of the screen

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## Navigating the ASSIST Screen

The screenshot shows the ASSIST interface with the following callout boxes:

- Available actions vary based on application context and user access:** Points to the 'Actions' sidebar on the left.
- Use '?' icons to access online help:** Points to a question mark icon in the breadcrumb trail.
- Find handy tips and system messages at the top of the screen:** Points to a tip message at the top of the main content area.
- Use tabs to navigate between forms:** Points to the 'Summary' tab in the top navigation bar.
- After submission, the Submit button is replaced with a View Submission Status Details link to track your submission:** Points to the 'Submit Application' button in the application details section.
- Some actions are only available from the Summary tab (e.g., Preview Application):** Points to the 'PREVIEW APPLICATION' button in the 'Actions' sidebar.

## ASSIST Action Notes

<b>Manage Access</b>
<ul style="list-style-type: none"> <li>Provides interface to control who has access to your application and what they can do within the system             <ul style="list-style-type: none"> <li>Access can be controlled across multiple variables: view/edit and budget/non-budget data</li> <li>Access must be managed by users with the SO (Signing Official) role on their eRA Commons account</li> <li>SOs can delegate Access Maintainer and Status Maintainer authority to other users</li> </ul> </li> </ul>
<b>Add Optional Form</b>
<ul style="list-style-type: none"> <li>Allows users to add additional forms to their application (e.g., Modular Budget, R&amp;R Budget, Subaward Budget, PHS Inclusion Enrollment Report, PHS Assignment Request Form)             <ul style="list-style-type: none"> <li>Available forms vary by Funding Opportunity Announcement</li> </ul> </li> </ul>
<b>Preview Application</b>
<ul style="list-style-type: none"> <li>Provides a preview of your application in the format used by the agency for review and funding consideration             <ul style="list-style-type: none"> <li>Cover Letter, PHS Assignment Request Form and Appendices are not part of the application image (maintained separately)</li> </ul> </li> </ul>
<b>Validate Application</b>
<ul style="list-style-type: none"> <li>Checks your application data against agency business rules prior to submission             <ul style="list-style-type: none"> <li>Form fields marked with an '*' must be completed before the system can validate that form</li> </ul> </li> </ul>
<b>View Status History</b>
<ul style="list-style-type: none"> <li>Provides history of submission status updates related to ASSIST actions</li> </ul>
<b>Update Submission Status</b>
<ul style="list-style-type: none"> <li>Allows you to change your submission status to <i>Work In Progress</i>, <i>Ready for Submission</i> or <i>Abandoned</i> <ul style="list-style-type: none"> <li>Your application must be error-free for the status to change from Work In Progress to Ready for Submission</li> <li>Ability to set an application to Work in Progress is restricted to users with SO or AO roles on their eRA Commons accounts, users granted Status Maintainer authority through the Manage Access action, and the initiator of the application</li> </ul> </li> </ul>
<b>Submit</b>
<ul style="list-style-type: none"> <li>Submits your application to the agency through Grants.gov             <ul style="list-style-type: none"> <li>Application must be in Ready for Submission status</li> <li>Available to users with the SO (Signing Official) role on their eRA Commons account</li> <li>Requires active Grants.gov Authorized Organizational Representative credentials</li> </ul> </li> </ul>
<b>Copy Application</b>
<ul style="list-style-type: none"> <li>Copies application data to a new application             <ul style="list-style-type: none"> <li>If copying to a different FOA, a 'best effort' match is done</li> </ul> </li> </ul>
<b>Delete Application</b>
<ul style="list-style-type: none"> <li>Permanently deletes an application from ASSIST – use cautiously, once it's gone – it's gone!</li> </ul>