User Guide

Terms and Conditions Module (TCM) for Grantees User Guide

August 9, 2024

NOTE: This user guide is an identical PDF version of the online help.

Contact Us

Additional Help Needed? Please contact the eRA Service Desk (https://www.era.nih.gov/need-help).

Toll-free: 1-866-504-9552; **Phone:** 301-402-7469

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

Feedback on the user guide? Please email the eRA Communications Office (era-communications@mail.nih.gov).

Disclaimer STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

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Latest Updates

Updates and new features in Terms and Conditions:

October 2, 2023

New Look and Feel for Online Help and User Guide

The online help and user guide have been updated to the new look and feel, consistent with the new look and feel of eRA Modules. There are no changes to the organization or function of the help topics.

Overview of Terms and Conditions

The terms of a grant are the legal requirements imposed on the grant by the administering agency, whether based on statute, regulation, policy, or other document referenced in the grant award, or specified by the grant award document itself. The Notice of Award (NoA) may include both standard and special conditions that are considered necessary to attain the grant's objectives, facilitate post-award administration of the grant, conserve grant funds, or otherwise protect the Federal Government's interests.

The Terms and Conditions Module (TCM) enables grantee organizations to track due dates and submit supporting documents to satisfy the terms/milestones of their grant applications.

Terms and Conditions User Roles

Users with PI, SO and BO user roles can access terms/milestones in eRA Commons, view term tracking, add comments and submit supporting documentation.

View Tracked Terms

For grants that have tracked terms, a *View Terms Tracking* action is available in the in the eRA Commons Status screen:

Application ID	Grants.gov Tracking#	Proposal Title	PD/PI Name	eSubmission Status	Current Application Status	Status Date	Available Actions
6U79SM080025-01M001		Project FORECAST (Foundations for OutReach through Experiential Child Advocacy Studies Training) - Anna on M001	PUNN, PERRY (PI)		Awarded. Non-fellowships only	09/27/2017	Correspondence View Terms Tracking
6U79SM080025-02M001		Project FORECAST (Foundations for OutReach through Experiential Child Advocacy Studies Training) - AP's on 02M001	PUNN, PERRY (PI)		Awarded. Non-fellowships only	10/02/2017	Correspondence View Terms Tracking
5U79SM080025-02	GRANT12357372	Project FORECAST (Foundations for OutReach through Experiential Child Advocacy Studies Training)	PUNN, PERRY (PI)	Submission Complete	Awarded. Non-fellowships only	07/18/2017	Correspondence View Terms Tracking
1U79SM080025-01	GRANT12162784	Project FORECAST (Foundations for OutReach through Experiential Child Advocacy Studies Training)	PUNN, PERRY (PI)	Submission Complete	Awarded. Non-fellowships only	08/31/2016	Correspondence View Terms Tracking

Figure 1: View Terms Tracking link

Actions

Click **View Terms Tracking**to go to the [View Terms Tracking Details](#) screen: In that screen qualified grantee users (PD/PI,MPI,SO,BO) can see the details all terms and conditions applicable to the grant, and can submit documents as needed to satisfy award terms, and to respond to grantor requests for additional materials (RAMs).

Click **Correspondence** to send email to the SMHSA Program Official responsible for this grant: A new email message will open, addressed to the proper recipient and bearing the subject line: *Correspondence for Grant <grant number>*.

View Terms Tracking Details Screen for Grantees

The *View Terms Tracking Details* screen, shown below, opens when you click the **View Terms Tracking** button for a grant in the eRA Commons *Status* screen.

This screen displays the current tracking status of all terms applicable for the grant project period, broken out by budget period. The *Next Due Date Status* column displays color-coded badges to indicate whether a term is Not Tracked, Unresolved, or Resolved.

The PD/PI, BO and SO can view award terms and conditions and submit documents as needed to satisfy those requirements.

SAMHSA/FDA/DOC View Terms Tracking Details

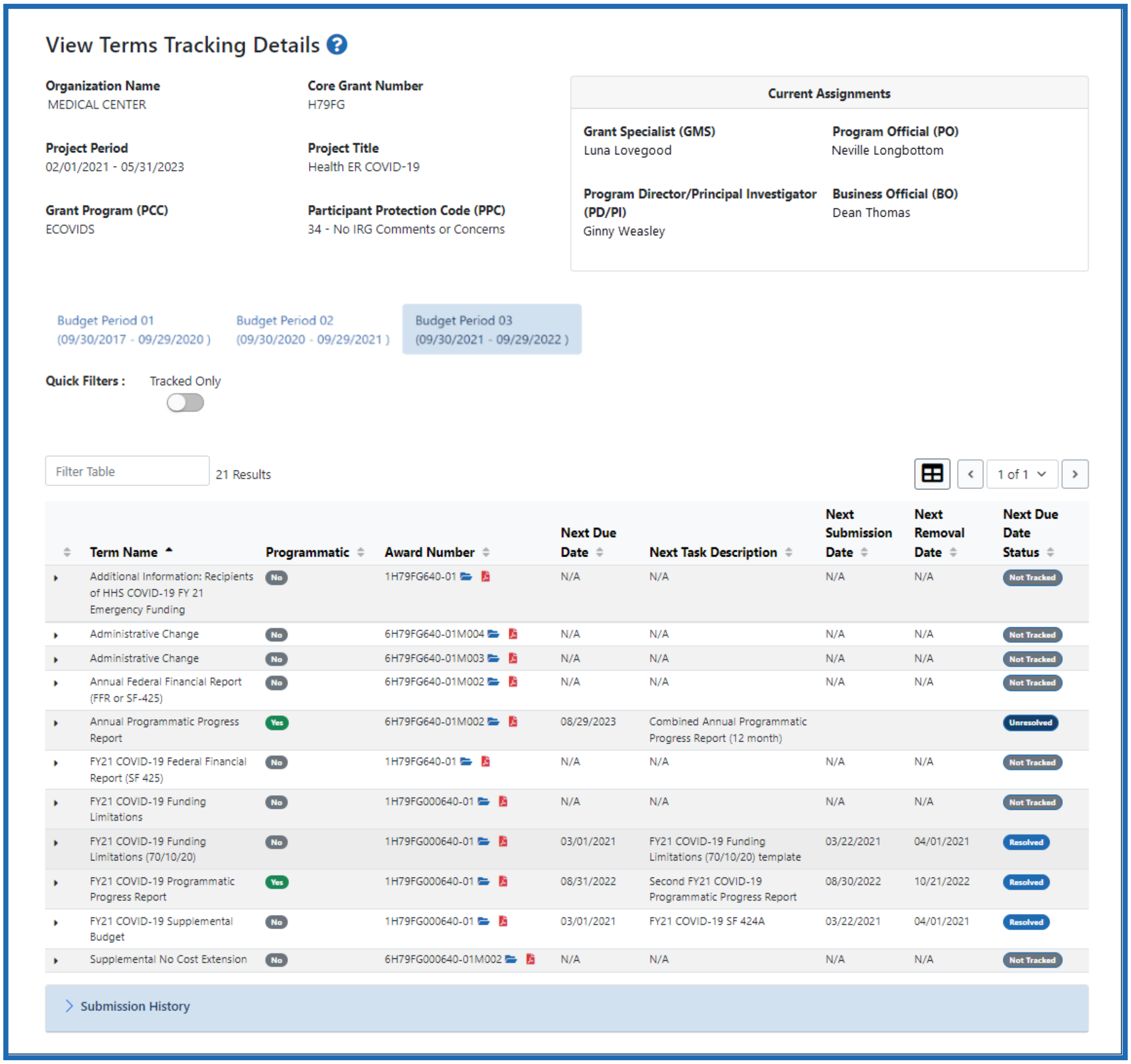

Figure 2: View Terms Tracking Details screen for grantees

OTA/VA View Milestones Tracking Details

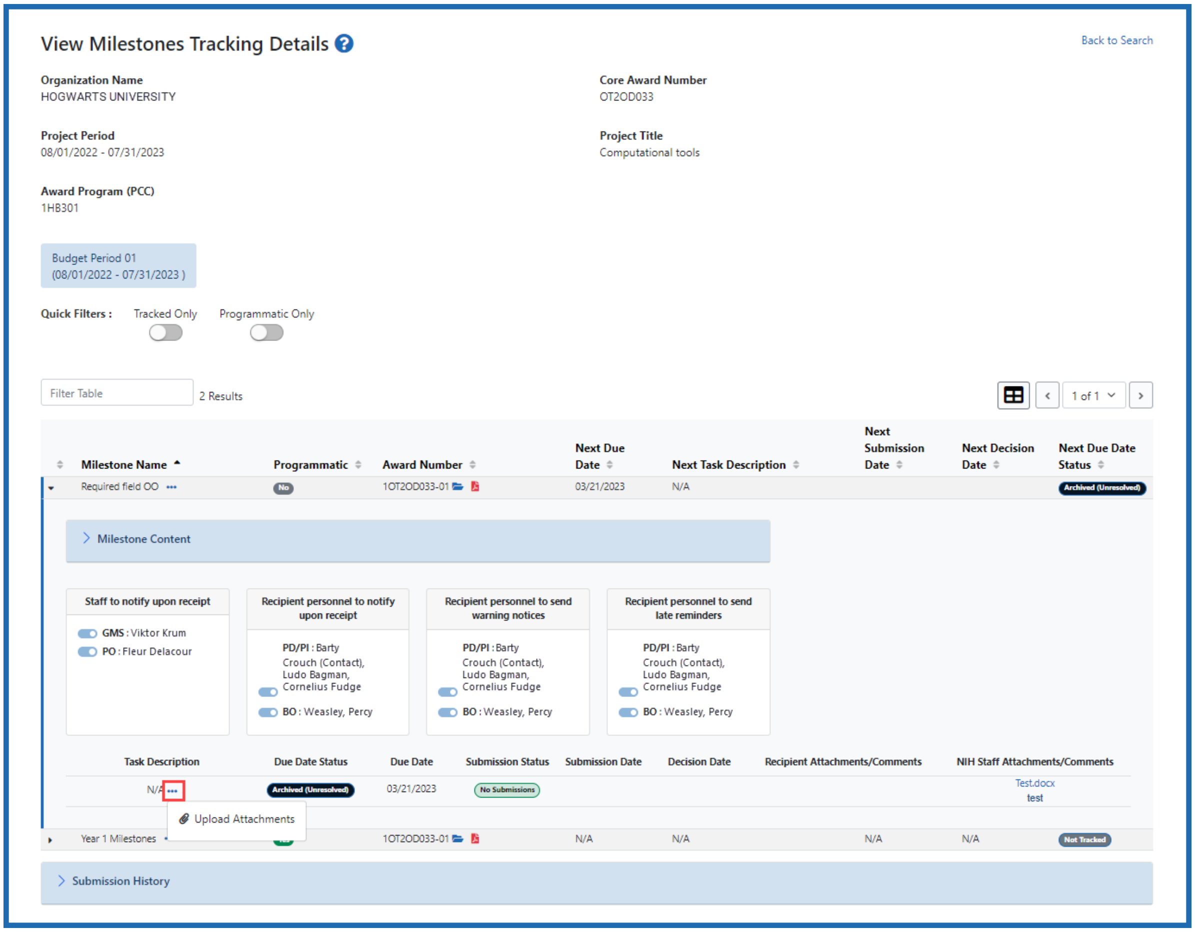

Figure 3: View Milestones Tracking Details screen

Working in this View

- Click a term name to see the text of the term.
- Click the folder icon next to the award number to open the Commons *Status Information* screen; or click the Acrobat icon next to the folder to view the Notice of Award.

Expanded View

Click the **>** right-arrow icon next to the term name, the click the **>** right-arrow icon next to *Term Content*, to open an expanded view of the term tracking details.

The expanded view lists the tasks associated with the term, and their due dates. *Due Date Status* displays color-coded badges to indicate whether a task is Resolved or Unresolved. *Submission Status* also displays color-coded badges to indicate whether a task has had No Submissions or is Unsubmitted, Submitted, or Returned.

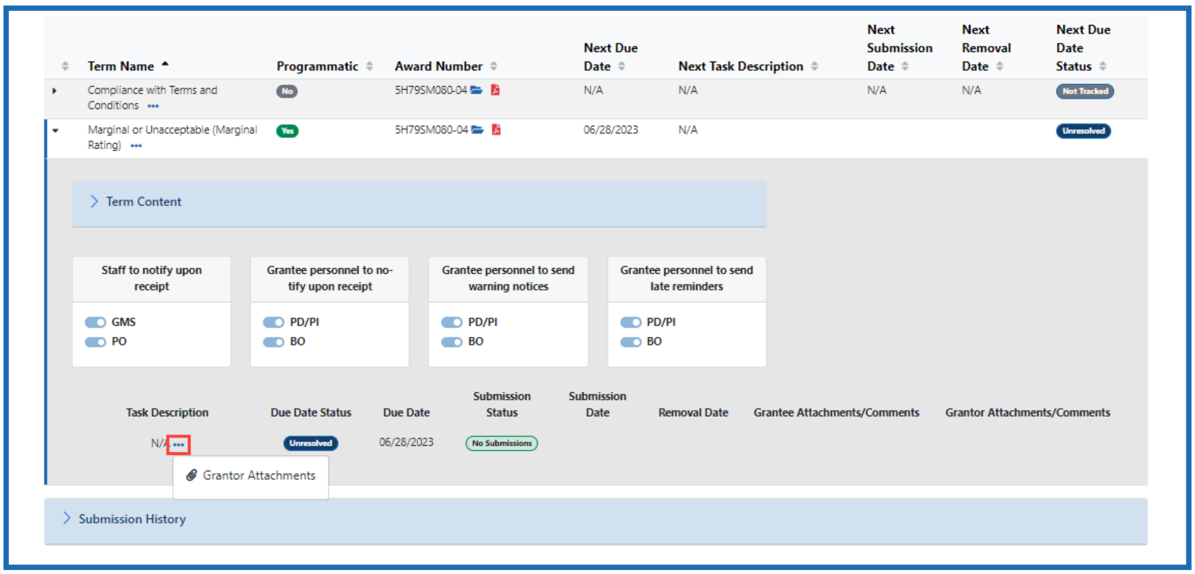

Figure 4: Expanded view

Working in Expanded View

- Click on an attachment or comment to view it.
- Click the action menu ••• for a specific task to select one of the following actions:
    - **Revise Documentation** — Attach documents and comments to the term task or view and edit existing attachments in the Additional Materials screen: If the grantor agency returns your document submission and requests changes or corrections, you can use this action to submit revised materials.

Note: This action is only available once you have submitted documentation for a task, but its due date status is still unresolved.

- **View Submission** — View all the attachments and comments for this term task, consolidated into a single PDF.

TIP: This is the only action available once a task has been resolved.

- **Prepare Documentation** — Attach documents and comments to the term task in the Additional Materials screen.

TIP: This action is only available when submitting documentation for the first time, and the task is unresolved.

Additional Materials Screen for Grantees

This screen opens when you click the **Prepare Documentation** or **Revise Documentation** action in the View Terms Tracking Details screen. Use this screen to upload and attach documents to a tracked term, or to view and edit existing attachments.

You can upload up to 10 files (PDF format only, maximum 6mb each). The uploaded files will be consolidated intro a single PDF attachment.

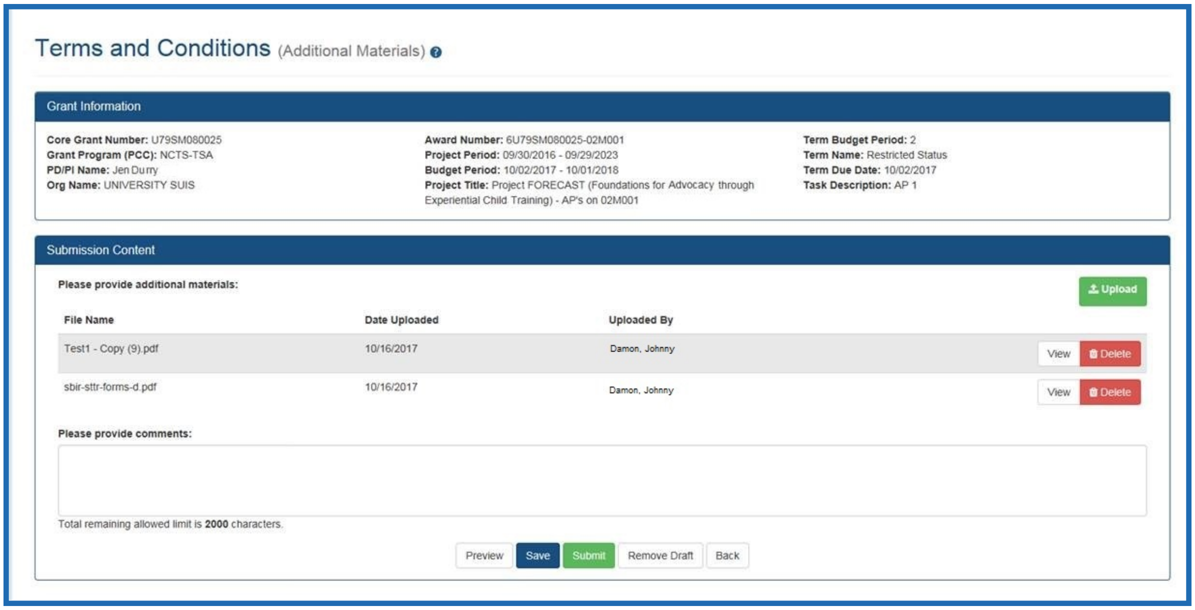

Figure 5: Additional Materials - grantee

Actions

- **Upload** — Click to browse and select a file to upload;
  and click again as needed to add additional files: another document row will be added to the grid; Browse to select the file to upload. You can include up to 10 files in a single attachment.
  Note: Alternatively, you can drag and drop up to 10 files at a time from your computer to the Submission Content area of the screen for to upload multiple files in one operation.
- **Delete** — Click to delete a file.

- **Comments** — Enter your comments about this submission: They will be included in the consolidated PDF attachment.
- **Preview** — Click to preview the complete attachment document: a consolidated PDF that includes the content of all the upload files plus the comments.
- **Save** — Click to save the upload files and the comments. You can click Save anytime, and return later to continue working on the submission. You must click **Save** to save any comments you entered.
- **Submit** — Click to send materials to the awarding agency
- **Remove Draft** — Cancel the document submission: If there was no previous submission then click to delete all uploaded files and comments and close the screen. If this is a revised submission then click to delete any changes (new uploads and/or comments) made since the last Submit action. Files and/or comments made in the previous submission will be kept.
- **Back** — Click to return to the View Terms Tracking Details screen. **Note**: Comments changes won't be saved unless you click **Save** or **Submit**. Any changes to file uploads will be retained in your draft until you click **Submit**.

Submission History - Grantee View

This section opens when you click the **Submission History** section heading at the bottom of the [View Terms Tracking Details](#) screen.

This screen displays the history of all grantee documents submitted for all terms on the grant.

Submission History

Filter Table 17 Results 1 of 2

Event Type	Event Date	Term Name	Task Description	Award Number	Due Date	Updated By	Files and Comments
Grantee Submission	08/30/2022 10:44:51 AM	FY21 COVID-19 Programmatic Progress Report	Second FY21 COVID-19 Programmatic Progress Report	1H79FG000-01	08/31/2022	Dumbledore, Albus	FY21 COVID-19 Programmatic Progress Report.pdf
Grantor Return Submission	01/27/2022 06:20:09 AM	Annual Programmatic Progress Report	Combined Annual Programmatic Progress Report (12 month)	6H79FG000-01M002	08/29/2023	Potter, Lily	FY21COVID-19 Programmatic Progress Report.pdf **External:** Wrong location - returned
Grantee Submission	01/26/2022 01:07:10 PM	FY21 COVID-19 Programmatic Progress Report	First FY21 COVID-19 Programmatic Progress Report	1H79FG000-01	12/31/2021	Lupin, Remus	FY21COVID-19 Programmatic Progress Report.pdf
Grantee Submission	01/26/2022 11:46:56 AM	Annual Programmatic Progress Report	Combined Annual Programmatic Progress Report (12 month)	6H79FG000-01M002	08/29/2023	Black, Sirius	FY21COVID-19 Programmatic Progress Report.pdf
Grantor Return Submission	01/26/2022 07:44:58 AM	Annual Programmatic Progress Report	Combined Annual Programmatic Progress Report (12 month)	6H79FG000-01M002	08/29/2023	Moody, Alastor	COVID-19 Progress Report December 21 Final Draft (1).pdf **External:** This has been uploaded to thewrong
Grantee Submission	01/25/2022 08:22:31 PM	Annual Programmatic Progress Report	Combined Annual Programmatic Progress Report (12 month)	6H79FG000-01M002	08/29/2023	Weasley, Arthur	COVID-19 Progress Report December 21 Final Draft (1).pdf
Grantor Return Submission	01/21/2022 07:59:51 AM	Annual Programmatic Progress Report	Final Programmatic Progress Report	6H79FG000-01M002	09/28/2023	McKinnon, Marlene	COVID-19 Progress Report December 21 Final Draft.pdf **External:** This is submitted under the wrong
Grantee Submission	01/20/2022 07:20:54 PM	Annual Programmatic Progress Report	Final Programmatic Progress Report	6H79FG000-01M002	09/28/2023	Longbottom, Alice	COVID-19 Progress Report December 21 Final Draft.pdf
Grantee Submission	03/22/2021 06:41:18 PM	FY21 COVID-19 Supplemental Budget	FY21 COVID-19 Supplemental Budget Narrative	1H79FG000-01	03/01/2021	Prewett, Fabian	Marimn Health ER COVID 19 supplemental budget revised.pdf New template used to generate
Grantee Submission	03/22/2021 06:40:45 PM	FY21 COVID-19 Supplemental Budget	FY21 COVID-19 SF 424A	1H79FG000-01	03/01/2021	McGonagall, Minerva	Marimn Health ER COVID-19 SF424 supplemental.docx

Figure 6: Submission History - grantee view

The header lists the following information: Organization Name, Core Grant Number, Grant Program (PCC), Project Title, Budget Period Start Date, Budget Period End Date

View Submission History

Click the **>** right-arrow icon to expand the **Submission History** section.

The expanded section lists the history of events concerning RAM submissions for this term.

It contains the following information for each event:

- Event Type (Grantee Submission, Grantor Return Submission, Grantor Submission, Grantor Close)
- Event Date
- Term Name — click to open the View Terms Tracking Details screen
- Award Number
- Due Date
- Updated By — Name and role of the grantee or grantor user.
- File Name — Click to view the submitted document.
- Comment

Additional Department of Commerce (DOC) Resources

Online help for Department of Commerce (DOC) users is in progress. If needed, additional eRA training materials can be found on the following DOC webpage: https://connection.commerce.gov/collection/grants-enterprise-management-solution.

NOTE: This webpage is accessible only by DOC internal users.