SAMHSA Terms & Conditions Transcript

Welcome to this tutorial video on how to respond to SAMHSA Grant Award Terms and Conditions. The purpose of this recording is to provide SAMHSA grantees a brief overview of the Terms and Conditions module in eRA Commons, and how to respond to tracked terms and conditions as stated in the Notice of Award.

SAMHSA grantees are subject to the terms and conditions that are listed in the Notice of Award. Some of those terms and conditions will be tracked and set up in the eRA Commons system with scheduled tasks and due dates. Grantees are required to submit documentation by those due dates through the eRA Commons Terms Tracking system to satisfy the tracked terms and conditions placed on the grant award.

Note: Not all terms or conditions are tracked. Terms or conditions that are not tracked will show a status of “Not Tracked” in eRA Commons.

This recording walks you through the process of:

- How to access the View Terms Tracking Details screen.
- How to identify which terms are “tracked” and the associated due dates..
- How to upload and submit documentation..
- How to submit revised documentation for returned submissions.

How to access the View Terms Tracking Details screen

To log into eRA Commons, go to public.era.nih.gov/commons. This will bring you to the eRA Commons login screen. On the left hand side of the screen, enter your credentials, then click **Login.**

In order to access the View Terms Tracking Details screen via eRA Commons, grantees need to be the project director of the grant with the Principal Investigator (PI) role, or a Signing Official (SO) of the Grantee organization with the SO role.

For Project Directors, click the **Status** tile located on the left side of the eRA Commons home page, then click **List of Applications/Awards** to view a list of the grants for which you are the assigned PD. Once you have located the grant, click the grant number to expand the grant information section, then click the **View Terms Tracking** button in the Available Actions column to be taken to the **View Terms Tracking Details** screen**.**

For Signing Officials, click the **Status** tile. On the search screen, enter the grant identification search criteria such as grant serial number and the support year, then click **Search**. Once you have located the grant in the search results table, click the three dot ellipses icon located next to the grant number to expand the action dropdown options, then click the **View Terms Tracking option** to be taken to the **View Terms Tracking Details screen.**

How to identify which terms are "tracked" and the associated due dates.

The View Terms Tracking details page consists of two sections – the top of the page contains an overview information about the grant, including your assigned SAMHSA Grants Specialist (GMS), and Program Official (PO). The bottom half of the page displays information about the Terms and Conditions placed on your grant award. Terms and Conditions are filtered based on the budget period to which they apply. Grantees can select different budget period tabs to view the terms and conditions applied to each budget period.

Note: When a budget period ends, it is recommended to check prior budget periods for any unresolved terms as they are still applicable and require a submission.

Ensure you are viewing the correct tab with the budget period matching the term to which you are responding. Click on the **Triangle** icon **(▶)** to expand the Term Name and Term Content. Below the Term Content, the Task Description will be listed with the corresponding due date. View the **Due Date Status column** to determine the overall status of the Term or Condition. A 'Tracked' term means you are required to submit requested information via the View Terms Tracking Details page by the due date.

Due Date Statuses include the following options:

- **Not Tracked:** A status of 'Not Tracked' means the term is not set up to receive submissions. Consult the full term contents to determine if submission is required elsewhere.
- **Unresolved:** The tracked term has not yet been resolved by SAMHSA 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 staff are reviewing your documentation for the tracked term.
- **Resolved:** Your submitted documentation satisfied the term or condition, and SAMHSA staff have marked it resolved.
- **Archived (Unresolved):** The tracked term has not yet been marked as Resolved by SAMHSA 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.

How to upload and submit documentation to SAMHSA in response to Tracked Terms

In order to submit documentation in response to a tracked Term or Condition, click on the **Triangle** icon **(▶)** to expand a term, then click the **Three-dot ellipsis** icon **(…)** and select **Prepare Documentation.** This opens the Terms and Conditions (Additional Materials) screen.

The Terms and Conditions module supports a large number of file types, as shown here. To attach up to 10 files, click the **Upload** button. Files can not be larger than 6MB. Click the **Preview** button to view all attachments, or click the **View** button to view individual attachments. After uploading the files, use the **Comment Box** to enter comments if necessary, then click **Submit** to send the documentation to SAMHSA.

The documentation is not accessible to SAMHSA staff until the Submit button is clicked; simply uploading the files does not complete the action. The Submission status for the Task Description will be updated to reflect “Submitted” status.

How to submit revised documentation for returned submissions

After SAMHSA reviews the documentation submitted by a grantee, if additional or revised documentation is required, the Submission status for the Task Description will reflect “Returned” status. Grantees will receive an email that the Term or Condition is not resolved, and will be required to login to eRA Commons to submit additional or revised materials. In order to submit revised documentation click the **Three-dot ellipsis** icon **(…)**, and select **Revise Documentation.** This opens the Terms and Conditions (Additional Materials) screen. Click the **Upload** button to attach the additional materials, then click **Submit** to send the additional materials to SAMHSA.

If you need additional assistance, you can contact your assigned Grants Management Specialist (GMS) for budget and grant-specific questions. You can contact your assigned Grants Project Officer (GPO) for program-related questions. And for technical questions, contact the eRA Service Desk.

Web: https://grants.nih.gov/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, closed federal holidays

This concludes this tutorial video on showing SAMHSA grantees how to respond to SAMHSA Grant Award Terms and Conditions in eRA Commons. Thank you for watching.