SAMHSA Two-way Correspondence Transcript

Disclaimer: This transcript is NOT a certified transcript, and thus is not a legal document and is not for use in a court of law. The information contained within this document is for general information purposes only.

The purpose of this recording is to show SAMHSA grantees how to use the eRA two-way correspondence feature.

Two-way correspondence is a feature that allows SAMHSA staff, Grantors, and Grantee users to correspond via email using special tags and have the email thread automatically stored in the eRA system. After this email thread is started, it can be continued completely outside the system but have replies officially documented and stored inside the system on the Correspondence Tracking page. The first email must be started in eRA; but all subsequent replies can be done through Outlook or your email client of choice.

Follow these steps to ensure the correspondence continues to be processed properly:

Use "**Reply All**" when responding to official correspondence. This will include the correspondence mailbox in the CC line. It is important to include this email address in two-way correspondence emails, as this mailbox is how the eRA system receives two-way correspondence emails. If you reply only to SAMHSA staff and exclude this mailbox, the eRA system will not receive your response and will not be able to document the exchange on the Correspondence Tracking page.

Do not alter the subject in your response, especially the grant number at the start of the subject. In order to keep the grant number correct, the subject line should not be manually edited in replies. If the grant number is changed, responses may not be tracked and stored correctly.

Do not delete the unique token at the end of the email. This lets the eRA system know which conversation your message belongs to. The token is unique to each email thread, so you cannot use the same token for a different conversation.

In order to send two-way correspondence emails in eRA, your eRA Commons account requires the Project Director (PI) or Signing Official (SO) role in eRA Commons. After logging into eRA Commons, access the Status screen by clicking Status, from the colored tiles located on the left side of the eRA Commons Homepage.

If you have the Signing Official **(SO)** role, search for the appropriate grant by inputting search criteria.

If you have the Principal Director **(PI)** role, select **List of Applications/Grants** from the Status screen.

Click the Plus icon to expand the desired award family on the Status Result List of Applications/Awards screen. A Correspondence button is shown under Available Actions. Click the button to initiate an email from within eRA.

Signing officials click the **Three-dot ellipsis** icon to access the **Correspondence** Action to generate correspondence.

On the **Generate Correspondence** screen, select your recipients, enter the subject line, type text in the body of the message, and include attachments. Supported attachment file formats are PowerPoint, Excel, Word, PDF, as well as .msg for messages.

Select **Generate Email** to send the two-way correspondence message. After you have sent a two-way correspondence message, you can view them by accessing the **Status information** page.

If you have the Signing Official **(SO)** role, search for the appropriate grant by inputting search criteria. If you have the Principal Director **(PI)** role, select **List of Applications/Grants**.

Click on the Application/Award ID to be taken to the **Status Information** page. From the **Status Information** page, scroll down to the **Correspondence** section. Click the **Correspondence Tracking** hyperlink to open **the Correspondence Tracking** screen.

From this screen you can view the full information for each correspondence including:

- the subject line
- when the correspondence was started
- when it was last responded to
- who started it
- who it was sent to
- what application it is tied to
- a sample of the body of the email
- any attachments including hyperlinks to view them
- a "View" hyperlink that will show you the message formatted as an email

Use the **Choose Application** drop-down to view correspondence for a specific application or click **All** to view correspondence for the entire grant family. Expand Correspondence using the + icon to view responses. Use the Filter box to search for a specific message or click on a column header to sort by that column.

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.

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- (GMS)
- Program- related questions: contact your assigned Grants Project Officer (GPO)
- Technical questions: contact the eRA Service Desk
    Web: https://grants.nih.gov/support
    Toll-free: 1-866-504-9552
    Phone: 301-402-7469
    Hours: Mon-Fri, 7 a.m. to 8 p.m. Eastern Time, closed federal holidays

This concludes this video on showing SAMHSA Grantees and Grantors how to use the eRA two-way correspondence feature. Thank you for watching.