Jefferson Office of Research Administration
Electronic Proposal Transmittal Form (e-PTF)
Frequently Asked Questions

1. How long before ORA's due date should I start working on the ePTF?
ORA still requires all completed documents 5 days before the sponsor due date. You should consider how many approvals are necessary and begin the process accordingly. As a reminder, Academic Finance and Outside Departments may take a few days each to review the documents. Your ORA Preaward contact cannot see the full application until each required approval has been granted.

2. What if a PI is not a Jefferson Faculty Member?
TJU's policy requires all applications to be submitted by employed faculty members (excluding postdoctoral fellows, according to Policy 110.14). If the PI is not an employed faculty member, the application may not be submitted through TJU. If the PI will become a faculty member, please include the offer letter as an attachment. For TJUH applications, the PI must be a TJUH employee.

3. What if the Administrative Contact Information is incorrect?
Administrative Contact Information is generated automatically from a table maintained by ORA. If you need to change the person assigned as the Administrative contact, please contact ORA at extension 3-6976 or resadmin@jefferson.edu. If the information in your profile is not correct, you may change it by Personnel Action Form (PAF) or through Self Service in PeopleSoft.

4. The organization I am applying to or subcontracting to is not listed in the directory.
Please contact ORA at extension 3-6976 or resadmin@jefferson.edu with the sponsor's or subcontractor's legal name, contact name and complete address and telephone number.

5. I am working on the budget and a technician's name is highlighted in red. What does that mean?
Red highlighting means that person does not have an Electronic Assignment of Invention Form on file. To complete the AoI, please access via PeopleSoft, under the Research Administration tab.

6. How can I build the entire Project Periods budget in the ePTF?
The ePTF is designed to only reflect the initial budget periods for new applications and the current year's budget for progress reports. Please use the sponsor's detailed budgets or an Excel spreadsheet to complete/calculate the entire project period budget. Attach any additional budget documentation in the Attachments tab.

7. The salary pre-populated in the ePTF is not the salary we expect to charge on this grant for the PI once the grant is awarded. How can we adjust the salary?
Salaries are pulled directly from the Human Resource salary database. If you are anticipating an increase, you can override the default salary. However, please include supporting documentation as an attachment within the application.

8. I accidentally selected "Route for Approvals," but I have a few changes I need to make. How can I retrieve the form?
You may ask an approver to reject the PTF, and it will reset to Working status. However, once the PTF has been fully approved and received ORA, departments will no longer be able to change the PTF. Please contact your preaward contact to discuss any changes.

9. What do the status designations mean?
Working – Still with the department
Routing for Approvals – Sent to approvers, then to ORA once approved
Pending – Submitted to the sponsor; waiting for award decision.

10. How will ORA know the application is ready for review?
ORA staff members are in contact with the department administrators and log into the ePTF on a daily basis to see what new applications are ready for review. You may also use the Notify button on the approvals tab of your ePTF to alert your preaward contact at resadmin@jefferson.edu that the ePTF is fully approved.

11. How do I enter personnel information for a student?
Click on "TBN" and add the student's actual name in the box provided.
Provide the current student salary.

12. Does the PI need to be the last to approve?
Only if the PI wishes to see the full budget with salaries; otherwise, the PI may approve at any time.

13. How can I easily send emails to approvers to let them know the form is ready for approval?
The "Notify" button at the lower left hand side allows you to compose emails to approvers.

14. What happens if changes are needed after the e-PTF is sent for approval, and because of the need for changes it is rejected?
The PTF resets to Working status once rejected. Both the initiator and the administrator(s) of the PI's home department can make changes at that point.

15. What do I do if there are changes to any information in the e-PTF after approval? Notify ORA as soon as possible.

16. Can e-PTF be accessed to work on and approve from off campus?
Yes, PeopleSoft may be accessed using the VPN. Contact IT to set up VPN access.

17. How do I print the e-PTF?
The "e" in the system name stands for "electronic." ORA recommends that you not print an e-PTF because all information is saved in PeopleSoft. If you need to view a page away from a computer, you can use "Print Screen".

18. Can I look up existing or closed grants?
Effort Administrators (as defined in ORA's Effort System) can view everything in PeopleSoft related to their Department ID number no matter what the status is. (Working, Pending, Funded, Closed, etc).

19. My sponsor does not follow a standard F&A rate or structure. How do I complete the F&A section of the budget?
Choosing "Other" as the F&A base allows you do insert your own calculations. The budget will show you the total of all direct costs, but you must enter the base and the F&A rate.

20. Can I include personnel who have no effort on the budget?
Only the PI may have zero effort, and only in certain circumstances, such as:
- Equipment grants or loans.
- Construction grants.
- Training grants (mentor only).
- Immeasurably small effort, such as in a long-term, low-enrolling clinical trial.

The PI may be listed as personnel on the budget in these cases. Please contact your preaward representative in ORA to discuss circumstances.

21. Can I copy a record over for a similar project, such as a continuation year?
Yes, records may be copied by clicking the "Copy to New" button. *You MUST click the "Clear PI/Budget" button immediately, and re-enter the PI, even if the PI is the same, before working on the new ePTF.* If you do not take this step, your budget will not be complete. Once you take this step, proceed as if you had started a new ePTF.

22. Why are the salaries in my budget so high?
Project period from the General tab automatically carries over to budget period on the Budget tab. If your budget period is different from your project period, you must change the budget dates accordingly. Salaries are calculated automatically using the budget period dates.

23. What information is required for obtaining approval to Cost Share?
Approval is required for mandatory and voluntary cost sharing. Implicit cost shares (such as salary caps) do not require additional approval. The finance offices in the University and Hospital require the amount of the cost share and the account that will be providing the funds. You may either attach this information into the ePTF record, or send it via email to the cost sharing approver listed on the Approvals tab. Note that you may also use the Notify function to send this email.

24. **How do I enter a Multi-phase trial?**
If your trial is a phase I/II, or is any other multiphase study, choose Other from the "What phase?" drop-down list on the Project tab.

25. **What do I do if one of the listed approvers is off campus?**
Off-campus access is available (see question 16). However, if an approver is not available, you must let ORA know at least one day in advance. (We will work with IT in an emergency if notice cannot be given in advance.) If you need to change an approver after the ePTF is routed for approvals, contact ORA immediately. One of the remaining approvers must reject the ePTF to reset the status to Working once ORA/IT makes the requested changes.

26. **Who can see attachments?**
For security reasons, attachments are identified by department. Administrators with access to that department's salary information, the Chair, the Dean, the cost sharing approver, and ORA can see attachments.

27. **Who has access to the Research Administration menu in PeopleSoft?**
Any member of any department that has ever certified an effort report may see the Research Administration menu. However, if a user is logging in to PeopleSoft for the first time, the menu will not show. Security runs on the 36th minute of every hour, so the user must log in again after the 36th minute of the next hour to see the menu. If your department is new to research, contact ORA for set up.

28. **Which fields are calculated automatically? How can I change the settings?**
The ePTF calculates merit increases, fringe rates, and F&A rates based on the salary on record and the budget dates at the top of the budget page. The underlying assumptions are managed by ORA and may not be changed. However, you may overwrite merit increases using the "Actual Salary" box; you may overwrite fringe benefits by using a to be named (TBN) employee; and you may calculate your own F&A by choosing Other as the base type. All salary calculations are based on a full month of salary, no matter how many pay periods or workdays in that month. Details about salary calculations can be seen by clicking the "Budget Date Calcs" link on the budget page.

29. For a clinical trial, how do I indicate that other entities/clinics/hospitals are enrolling or performance sites?
You may type the names of other performance sites into the text box. There is no drop-down list for this field. It is important to name all sites to ensure that they are named in the contract. Note that this is not for multicenter trials, but for sites that will be enrolling under the Jefferson contract.