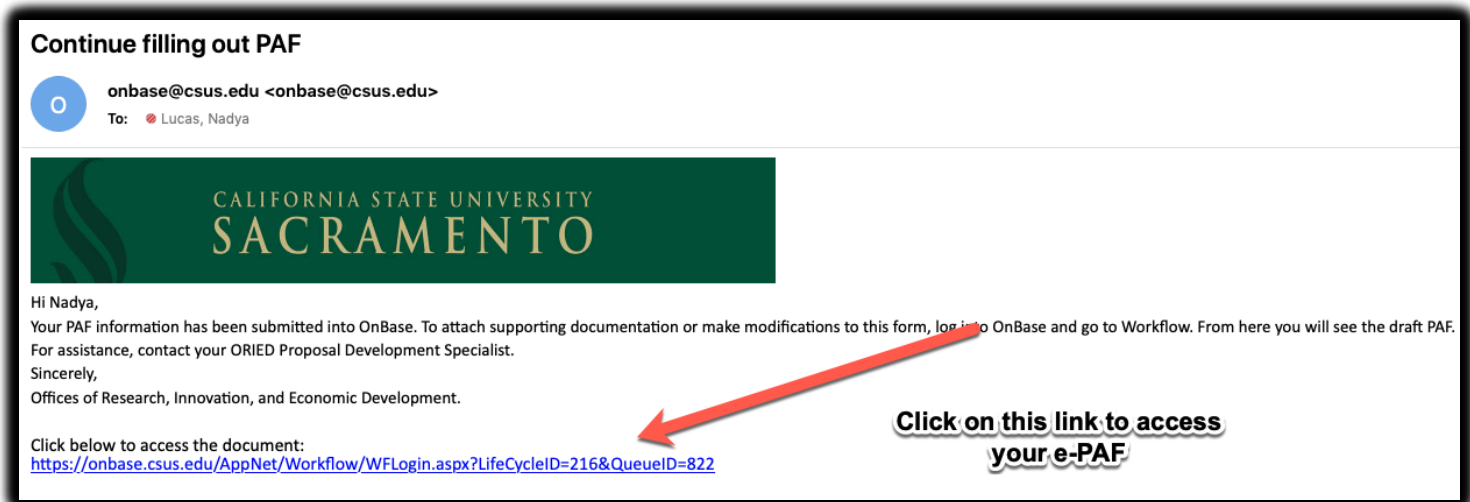


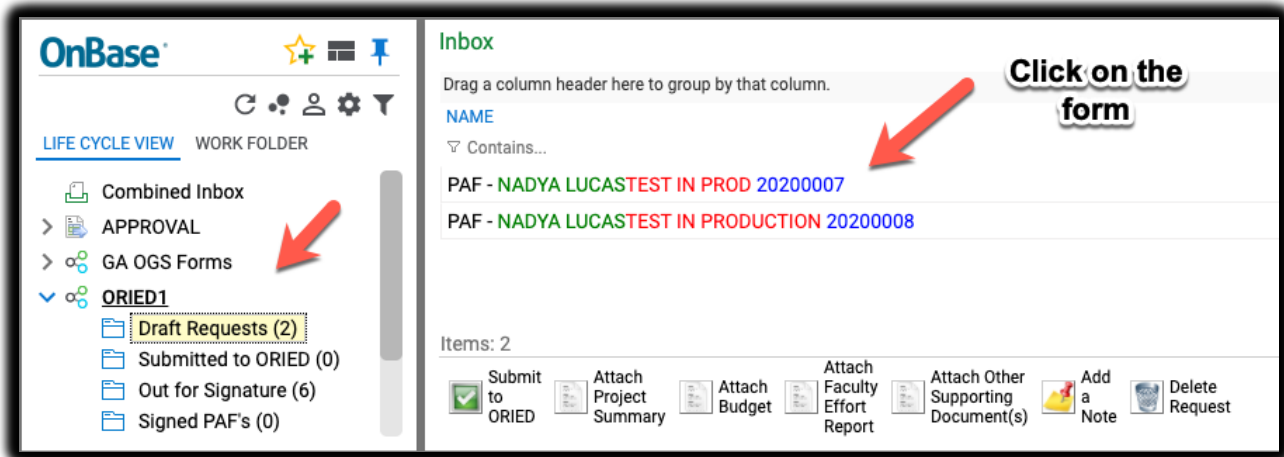
Electronic Proposal Approval Form (e-PAF) e-Form and OnBase User Guide for Principal Investigators

To initiate an electronic Proposal Approval Form (e-PAF) for a grant or contract proposal, please complete the following steps.

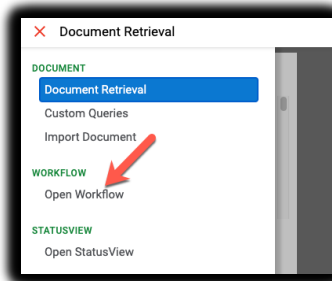
1. Access the e-form through the Office of Research, Innovation & Economic Development (ORIED) website. Please click [HERE](#) to fill out and submit the form. The instructions on how to submit an e-PAF request can be found [HERE](#).
2. Complete the fields to the best of your knowledge. When most of the form is completed, click **Submit**. You will receive an email notification with the link to continue working on the form in OnBase. In OnBase you will be able to make the necessary corrections/adjustment, and attach supporting materials. The e-form browser window can be left open as you are filling the e-form out, but to save a draft and return to it at a later date you must **Submit** and access the saved version through OnBase.



3. Clicking on the link, will route you to the form you submitted inside of OnBase. Alternatively, you can access your e-PAF by signing into **OnBase Web Client** through My Sac State/Faculty and Staff Services or using this [Link](#).
4. When you click on the link from the email notification or sign into OnBase, your form will be in the queue **OREID1/Draft Requests**. You will only see the form(s) submitted by you:

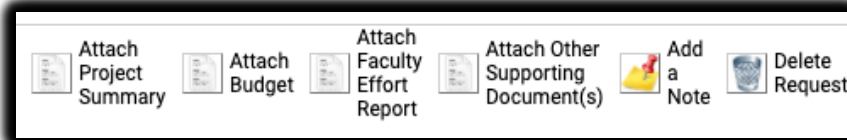


- If you are signing into **OnBase Web Client** from My Sac State or using the link, please click on the “hamburger” button on the top left and then click **Open Workflow**:

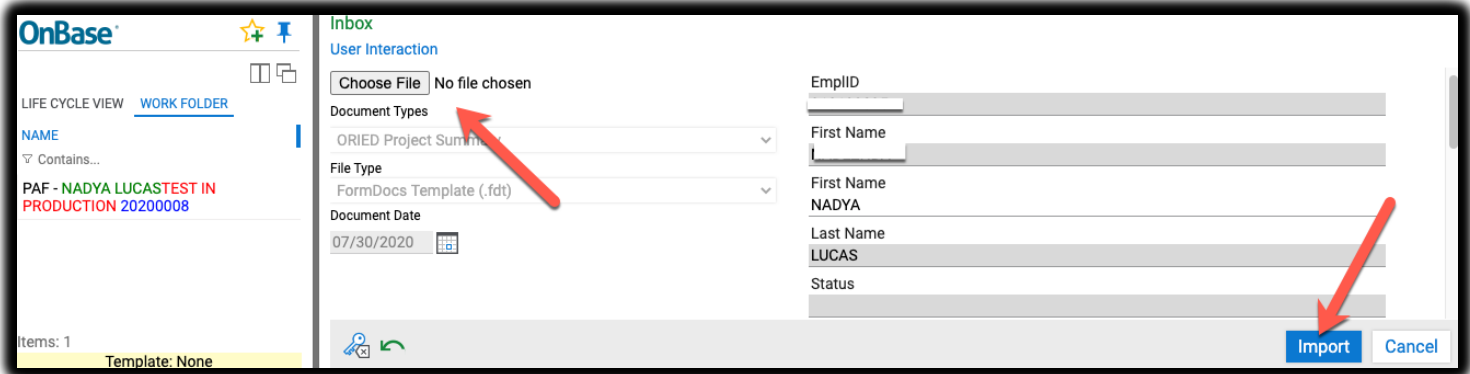


- When you open the form, it will be displayed in the bottom portion of your screen. You can make any corrections/adjustments and/or finish completing the form and click **Save** at the bottom.

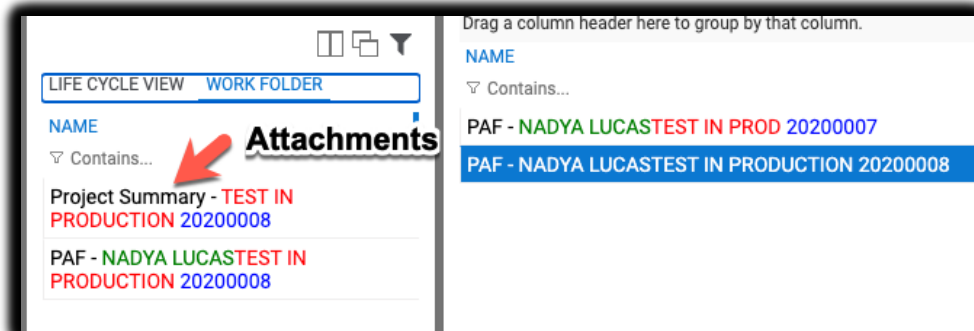
7. To attach supporting documentation, click on the appropriate button:



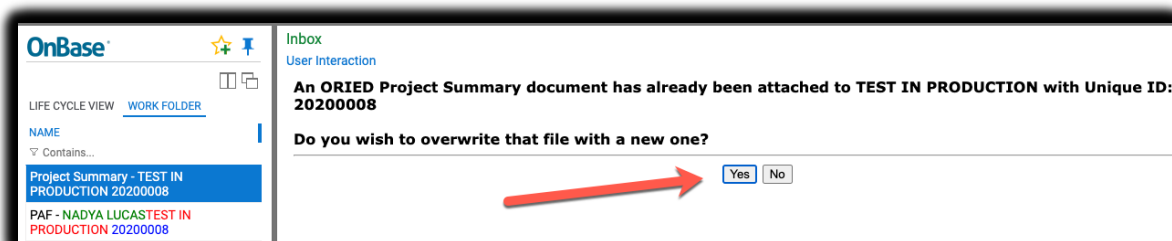
8. When you click on any of the **Attach** buttons, please click **Choose File** and choose the document you would like to attach. The click **Import**. Attachments can be in any format include PDFs, Word and Excel documents.



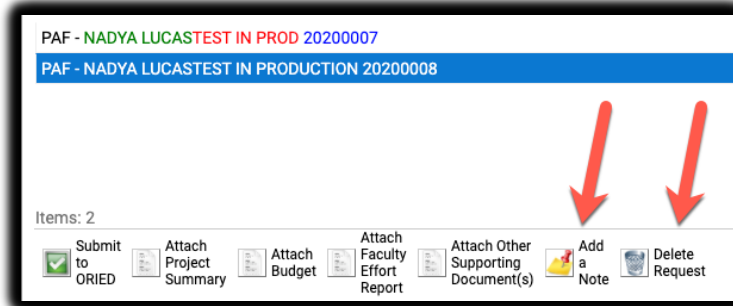
9. All attached files can be accessed from the top left under the **WORK FOLDER**. Click on any attachment to view, if needed.



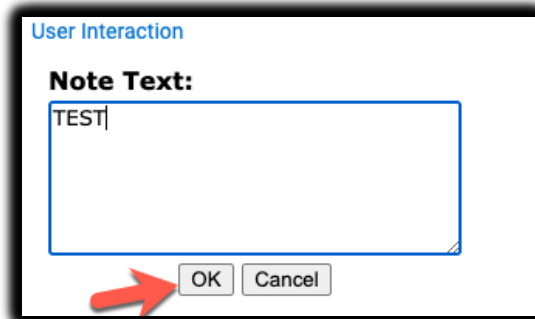
10. To re-attach or upload a revised version of a document, click again on the same Attach button (e.g. Project Summary) and it will ask you if you would like to overwrite. Click Yes and it will attach a new file:



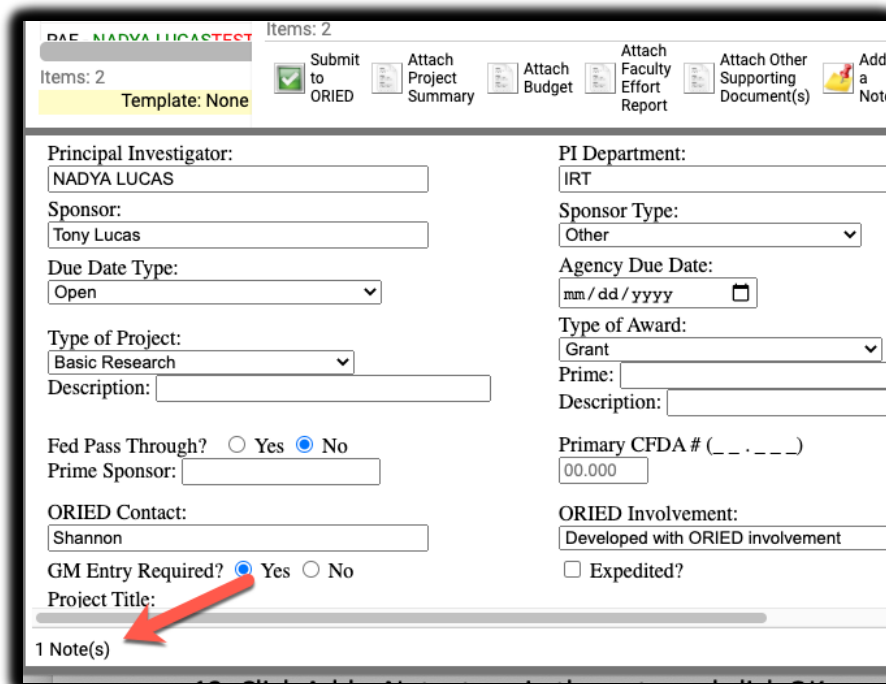
11. All PIs can access this document and make the necessary adjustments and attachments. You can also **Add a Note** or **Delete Request**:

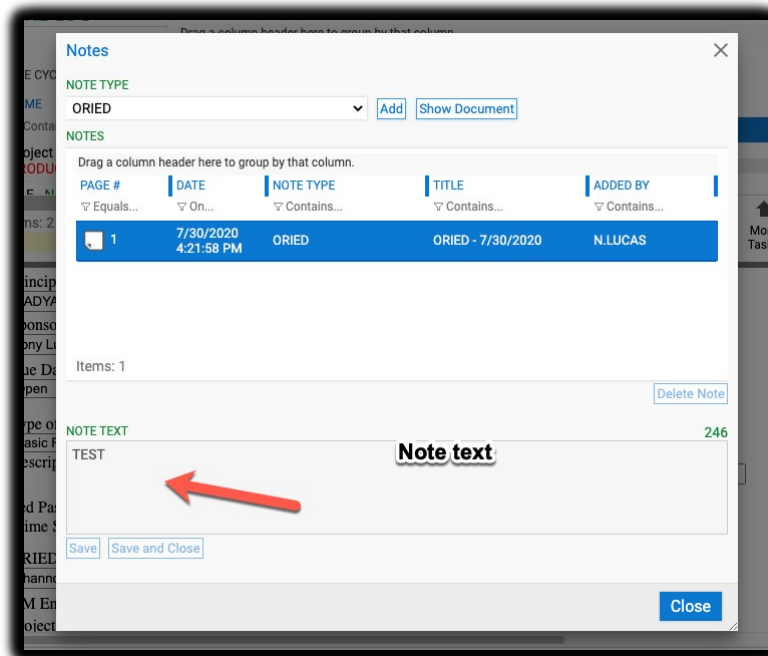


12. Click **Add a Note**, type in the note and click **OK**. These Notes will be saved as part of the proposal's OnBase record but will not be included as part of the package routed to approvers. Notes to the approvers should be included below in the Notes section of the ePAF OnBase form.

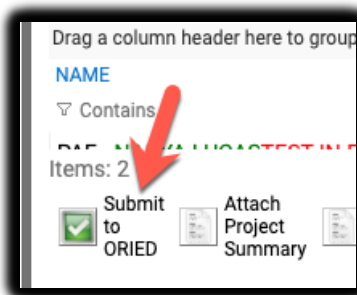


13. To see all notes, click on **Note(s)** on the bottom left of the OnBase Web Client:





14. When the form is completed to the best of your knowledge, click **Submit to ORIED**.



15. Your ORIED point of contact (e.g. proposal or contract specialist) will review and be in touch with any questions. Once the PAF package is complete, your ORIED point of contact will send it out for signatures though **Adobe Sign**. If they need you to correct/adjust, they will return it to the **PAF Drafts** queue. You will receive a notifying email with the link to the document. Please click on the link, adjust the documents and click **Submit to ORIED** again.

16. Once the PAF package is sent out for signatures, you will receive the Adobe Sign notification for your review and approval. You will also receive a copy of the fully approved PAF package as soon as it is signed by all required approvers.