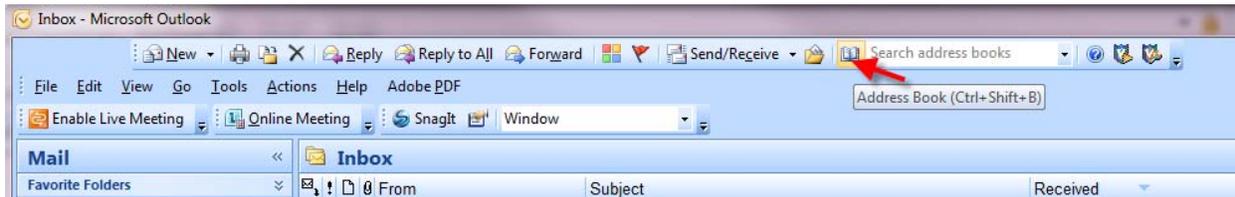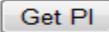# Quick Reference to e-IAF Instructions

- All * items are required fields and must be completed before the form can be submitted.

- You must know the link blue ID for the Principal Investigator (PI) and all Co-I (Co-Investigators) to complete the form.

- You can find the link blue ID by going to Outlook and searching for the individual using the address book.

Click on the Address Book icon and enter the individual's name you are looking for (last name , first name) Scroll across the window until you see the Alias Column. The Alias is the link blue ID.
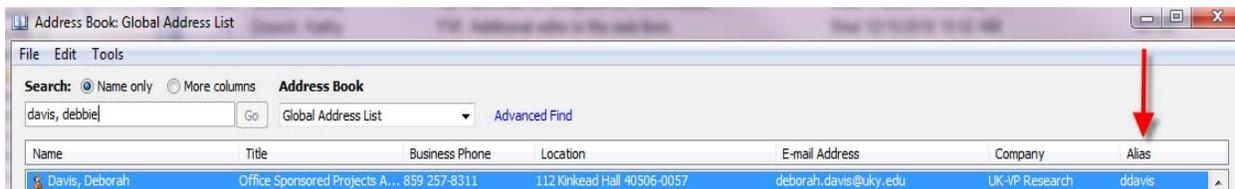
- You may save an incomplete or completed form at any point in time. A saved form must include the proposal title. All saved forms are stored alphabetically according to the proposal title. Once the form is submitted, the saved version is then deleted.

- Do **NOT** use the backspace key unless the cursor is in a specific field on the form. Using the backspace on the application itself will kick you out of the form altogether and unless you have previously saved the form, the information will be lost requiring you to start over.

- Using the **SAVE** feature will allow the form to be retrieved by anyone using the Proposal Title.

- Once you recall a saved form, you must retrieve the [Get PI] information again before you can submit.

- Once the form has been submitted, the notification number is needed to retrieve the form.

- If the project has cost sharing, then the amounts are entered in the University Column of the budget (block 7). The next 2 fields must be completed in order for the form to be submitted. If the sponsor only pays a limited F&A, the field indicating the source of funds may say 'not applicable'.

- The form has 8 numbered blocks (sections). Each block has a [?] in the upper right hand corner. Clicking on the question mark provides helpful information for that particular block (section).

- A step by step instruction document can be found on the Office of Sponsored Projects Administration's (OSPA) website - http://www.research.uky.edu/ospa/forms.html

- Once the e-IAF has been submitted, an email is sent to the individual who created the form in order for attachments to be added. Once the attachments are added, the PI will receive an email to start the certification process. If the PI is the individual who initially created the e-IAF, no separate email will be sent.

- The College Grants Officer (CGO) is the only individual who can change the form once the PI has certified the e-IAF. If a change is needed, contact the CGO. If your unit does not have a CGO, contact the Research Administrator in OSPA.

- If the PI or Co-I fails to certify, a reminder email will be sent after 6 hours.

- 1st and 2nd level approvers will receive an email when workflow routes to the approver for action. The approver will receive a reminder email if no action has taken place within 6 hours. After 24 hours of no action, an email will be sent to the approver's delegate for action.

- 1st and 2nd level approvers will establish an individual to be their delegate for the workflow process. The delegate will have the responsibility of approving the e-IAF to complete the workflow process.

- Once the e-IAF process has been completed, the PI and OSPA will receive an email that the process has been completed.