This resource provides tips for communication between the University of Michigan’s research project teams and its central offices (e.g., Office of Research and Sponsored Projects (ORSP), Finance-Sponsored Programs, or compliance offices), addressing best practices for universal and traditional communication means as well as via U-M-specific tools like the eResearch proposal management (eRPM) system.

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Page 2: eRPM Communication Matrix to guide when to use different eRPM activities, accompanied by links to eRPM step-by-step guides.
Page 3: Email vs. Phone Communication Matrix with tips on when to email vs. when to phone.

Effective communication is at the heart of any thriving organization. Each day we ask questions, offer and seek updates, and strive for understanding and good outcomes.

In times of remote work, deadlines, increased work volume, physical barriers, or other stress-inducing challenges, we all can benefit from a refresher on established protocols and clear expectations for communications.

In a world of constant change, the fundamentals are more important than ever." - James C. Collins
### eRPM Communication Matrix

<table>
<thead>
<tr>
<th>eRPM Communication Method</th>
<th>When to Use</th>
<th>Results</th>
<th>Does it trigger email?</th>
<th>Examples &amp; Scenarios</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="http://myumi.ch/yKmZ5" alt="Project Team Request ORSP Action" /></td>
<td>To request that ORSP take action or make changes to a Proposal Approval Form (PAF) or an Unfunded Agreement (UFA), or send items to sponsor. To share a PAF/UFA status change. Example: pre-award changes; sponsor requests a pre-award rebudget from a principal investigator (PI); to forward Award documents. <strong>Tip:</strong> You need to have Primary Research Administrator status to use this. <strong>Tip:</strong> If there is a sponsor deadline for this request, be sure to include that date at the beginning of your request.</td>
<td>Each action request moves the PAF/UFA into the ORSP Project Representative’s eRPM inbox. All who have access to the PAF or AWD can see comment, but they have to go into the record to see it. <strong>Tip:</strong> Post a Comment does <strong>not</strong> put the request in the PR’s work queue, thus, PRs handling coverage will not know if action needs to be taken. Don’t use for action-oriented communications.</td>
<td>No.</td>
<td>PI indicates proposal has been turned down; update PAF/UFA docs sent to PI.</td>
</tr>
<tr>
<td><img src="http://myumi.ch/yK5PM" alt="Post a Comment" /></td>
<td>Use as an FYI for the record and not for action-oriented items.</td>
<td>Generates “acknowledgment request” emails to all previous PAF approvers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="http://myumi.ch/qgd4v" alt="Send to Project Team for Changes" /></td>
<td>This is for ORSP’s use to make and submit changes to a PAF/UFA in the approval process. <strong>Tip:</strong> Include all necessary information.</td>
<td>Places the request in the ORSP PR’s work queue and can be seen by all PRs handling coverage if that PR is out.</td>
<td></td>
<td>Document an issue with a PAF.</td>
</tr>
<tr>
<td><img src="http://myumi.ch/BoRml" alt="Request Action" /></td>
<td>To request that ORSP take action on or make changes to an AWD, create an Award Change Request (ACR). Request Action on the AWD record to either: 1. Request one or more changes to an AWD such as a no cost extension, approval of UG expenses, change of PI, etc., 2. Request an Other Action from ORSP (such as submit a progress report, add a HUM number to a project, etc.). See: <a href="http://orsp.umich.edu/acr">orsp.umich.edu/acr</a> for more details.</td>
<td>Yes, in every instance used, to everyone with approval access to the PAF.</td>
<td>Budget revision, indirect cost rate change, effort change, or other event requested by unit.</td>
<td>Budget or effort revisions, indirect cost rate change, or other event requested by unit.</td>
</tr>
</tbody>
</table>

**eRPM Guide URL:**
- [http://myumi.ch/yKmZ5](http://myumi.ch/yKmZ5)
- [http://myumi.ch/yK5PM](http://myumi.ch/yK5PM)
- [http://myumi.ch/qgd4v](http://myumi.ch/qgd4v)
- [http://myumi.ch/BoRml](http://myumi.ch/BoRml)
**EMAIL VS. PHONE COMMUNICATION MATRIX**

<table>
<thead>
<tr>
<th>WHEN TO EMAIL</th>
<th>WHEN TO PHONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>When eRPM is not an option, you can draft an email. Do this when...</td>
<td>Picking up the phone (and leaving a voicemail) may help when...</td>
</tr>
<tr>
<td>• documentation in eRPM is not necessary.</td>
<td>• ...you need a quick confirmation or to speak with someone directly (remember to leave a voice mail).</td>
</tr>
<tr>
<td>• documentation aids later support and clarification.</td>
<td>• ...you are experiencing miscommunication (e.g., still not clear after writing back and forth).</td>
</tr>
<tr>
<td>• clarification is needed before documenting in eRPM.</td>
<td>• ...you need to discuss complex situations or when multiple issues need resolution.</td>
</tr>
<tr>
<td>• you need to share correspondence with a sponsor.</td>
<td>• ...you’re asked to respond by phone, or you need to speak in real time via phone or Zoom</td>
</tr>
<tr>
<td>• you would like to request a Zoom consultation.</td>
<td>• ...for urgent matters or same-day requests (and, of course, it is best to plan ahead and avoid these situations wherever possible).</td>
</tr>
</tbody>
</table>

### ...& HOW

**Always:**

- Include all contact information in your signature, including your email and phone number.
- Include relevant U-M reference information, e.g.:
  - Award record (AWD) number;
  - Proposal Approval Form record (PAF) number;
  - Unfunded Agreement record (UFA) number;
  - Project/Grant (P/G) number (for Finance-Sponsored Programs);
  - Principal Investigator (PI) name;
  - Sponsor name and detailed contact information (if requesting that a central office contact them).
- Direct your email to the person you’re requesting a response from, using the “To” line appropriately.
- Copy interested parties when necessary, using the “cc:” line and “Reply to All” appropriately.
- Proofread for accuracy, clarity, and tone.
- When forwarding, summarize the action requested in the introduction. Re-iterate the subject in the first line of an email, and include your question.
- Put as much key information in the subject line as possible, including “URGENT” and a “RESPOND BY” time if a same-day reply is needed.
- Time-sensitive messages should describe consequences of a delayed response.

### ...& HOW

**Always:**

- Leave a voicemail, which will be automatically transcribed and forwarded via email.
- Identify yourself and why you are calling.
- Concisely reference any relevant U-M reference information, e.g.:
  - AWD number;
  - PAF number;
  - UFA number;
  - P/G number (for Finance-Sponsored Programs);
  - PI name;
  - Sponsor name and detailed contact information (if requesting that a central office contact them).
- If you do connect, be sure to ask if it is a good time to speak with the person you’ve called and indicate how long you think you’ll need to resolve the matter (e.g., “Do you have five minutes, or time for a quick call?”).