

# Proposal Routing Instructions for Grants 10.5

## System Updates to Routing

Chair (or Finance Officer for Thayer) and Associate Dean (A&S only) Reviewers will no longer be chosen in the routing activity as individuals.

Dean (Geisel), Fiscal Office (Geisel and A&S), and OSP Director Reviewers (less common) will rely on ancillary review and selection of an individual.

## Reviewer Defaults

Chair and Associate Dean Reviewers default based on the FP submitting department and routing process for the relevant division (e.g., Geisel, A&S, Thayer, Provost):

### **Arts & Sciences**

Defaults to Chair and Associate Dean

For limited scenarios requiring other approvals manage via Ancillary Review

### **Geisel**

Defaults to Chair

For limited scenarios requiring Dean's Office approval manage via Ancillary Review

### **Thayer**

Defaults to Finance Officer as Chair

## New Routing Steps

Before routing a proposal, check the Reviewers tab to see who is listed in the appropriate Approval Steps for your division.

If the Chair is the PI, route the FP for their approval, then use Manage Ancillary Reviews to send additional approval if your division requires it.

If an approver is listed who is away on vacation, please contact your Grants Officer to update the approver for the submitting department BEFORE routing your proposal.

If you route a proposal and discover that a Reviewer is unavailable while the FP is in the Department Review state, contact your Grants Officer to update the approver.

## Check Reviewers Tab

Before routing your FP, look at the names of the Reviewers in the Approval Steps on the Reviewers tab:

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	...
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**Contacts**

Name	Organization	Phone	Email
Stephanie Morgan	Ofc of Sponsor Proj	603-646-3977	Stephanie.Morgan@Dartmouth.edu
ERA testpisix	Chemistry	(603) 646-1217	dartmouthrapport@gmail.com
ERA testresadmin3	Dean of Faculty		dartmouthrapport@gmail.com

**Reviewers**

The following people will review this proposal and provide organizational approval

Current Step: 1

**Approval Step 1**

ERA testchair1

**Approval Step 2**

ERA testdean2

## When Reviewers Require Updating Before Routing

If an approver needs to be updated, please email your Grants Officer requesting the change.

Do not route your proposal until the Grants Officer has notified you that the approver has been updated.

Before routing, double check that the change has been made by checking the Reviewers tab.

There is no need to request that the Chair approver be changed when the Chair is the PI on the proposal (use Manage Ancillary Review if your division requires additional approval).

## Submit For Department Review

When the approvers are correct, click OK on Submit For Department Review to route the FP:

**Draft**

**Next Steps**

Edit Funding Proposal

Printer Version

Submit For Department Review

Routing activity is called Submit For Department Review

Approvers are no longer selected

Approvers default based on submitting department

**Submit For Department Review**

By clicking OK, the proposal will transition to Department Review and all approvers for the submitting department will be notified to log in and review the proposal.

Once in Department Review, PIs and Administrative Contacts can no longer edit the proposal.

**1. Comments:**

**2. Supporting documents:**

+ Add

Name

There are no items to display

OK
Cancel

## Post-Routing Reviewer Change

If your proposal was routed and you discover that a default Reviewer is not available, contact your Grants Officer to request that the reviewer be updated on the FP.

After the Reviewer has been changed, use the Send Email activity to let the new Reviewer know that the FP is waiting for their review/approval.

The screenshot shows the 'Send Email' form with three main sections:

- 1. \* Email subject line:** A text input field with a callout box that says "You can customize your subject line".
- 2. \* Select at least one group of recipients:** Four radio button options: "All team members", "All editors", "All readers", and "Specialist". A callout box says "Select the recipients for your message below to ensure your message is being delivered correctly". Below this is a search field with a dropdown arrow (circled in red) and a table with columns "First Name", "Last Name", and "E-Mail". The table content is "There are no items to display".
- 3. \* Comments to be included in the email:** A text area with a callout box that says "Comments added here will appear in the email to the recipients".

## Manage Ancillary Reviewers

After the proposal has been routed and is in the Department Review state, if your division requires additional approvals for the application, use the Manage Ancillary Reviewers activity (e.g., Fiscal Office, PI is Chair, etc.).

### Fiscal Office Review

Fiscal Office Reviewers can no longer be added as approvers in the routing activity.

Use Manage Ancillary Reviewers for Fiscal Office approval if your school has a separate step for this approval (e.g., cost share, indirect waiver, etc.).

### When the PI is the Chair

Use Manage Ancillary Reviewers if the PI of a proposal is the Chair and your division requires additional approval of the application before submission.

Use this activity only if required by your school approval policy for:

Fiscal Office approval

When Chair is PI of a proposal

1. Identify each organization or person who should provide additional review.

+ Add

Review Type	Org	Person	Reqd	Accepted	Notified	Comments	Docs
There are no items to display							

OK

Cancel

Add Ancillary Review

1. Identify each organization or person who should provide additional review.

+ Add

Review Type	Org	Person
There are no items to display		

1. \* Select either an organization or a person as reviewer:

Organization:

Person: ERA testdean1

2. \* Review type:

Other

3. \* Response required?

Yes  No [Clear](#)

4. Comments:

Hi Test Dean,  
The Chair is the PI on this Proposal, so I am sending it to you for your review/approval per our school policy.  
Thanks,  
DRA

Do not choose an organization for approval

Choose the individual person to review/approve the FP

Comments entered here will appear in the notification to the Ancillary Approver

You do not have to require a response as business processes exist to monitor whether approval is granted

If you require a response, the FP cannot be submitted until the approval is done

5. Supporting documents:

\* Required

OK

OK and Add Another

Cancel

You can review your comments before you send the Ancillary Review by clicking OK:

1. Identify each organization or person who should provide additional review.

+ Add

Review Type	Org	Person	Reqd	Accepted	Notified	Comments	Docs
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Update

Other

ERA testdean1

no

no

Hi Test Dean, The Chair is the PI on this Proposal, so I am sending it to you for your review/approval per our school policy. Thanks, DRA

OK

Cancel

## Ancillary Review Notification

Ancillary Reviewers will receive the following notification with a link to the FP. Instructions for Submitting Ancillary Reviews are available on the OSP website.

From: <[rapport-no-reply@dartmouth.edu](mailto:rapport-no-reply@dartmouth.edu)>

Date: Tue, Apr 23, 2024 at 9:29 AM

Subject: Ancillary review notification

To: Reviewer, DRA

### Notification of Ancillary Review

**To:** ERA testdean1

**Link:** [FP00010859](#)

**PI:** ERA testpisix

**Title:** SM Mapping Test 20240422

**Required:** No

**Description:** A Funding Proposal has been assigned to you for ancillary review. Click the link above to access and review the submission.

**Comments:** Hi Test Dean,

The Chair is the PI on this Proposal, so I am sending it to you for your review/approval per our school policy.

Thanks,  
DRA

## Ask OSP

Please reach out to OSP if you have any questions or need additional information as we transition to our upgraded system.