Principal Investigator RAPPORT Quick Guide
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Purpose of the Principal Investigator RAPPORT Grants Quick Guide

In this guide, items marked with a ⭐ indicates important information to note.

This guide is intended to assist the Principal Investigator through the RAPPORT process when submitting a grant application or research proposal through the Office of Sponsored Projects. This Quick Guide is to be used when a Department Research Administrator (DRA) is creating and routing a proposal submission in RAPPORT. If you do not have a grant administrator or are creating and routing a submission via RAPPORT yourself (as PI), please refer to the Department Research Administrator Guide.

The RAPPORT system provides:

- All proposals will be routed via RAPPORT including non-grants.gov.
- Document storage of all proposals. Upload all final documents to serve as the official institutional proposal record.
- Transparency and document storage for all award information.
- Submission of new, resubmissions, competing renewals and non-competing continuations.
- Transparency for issuance of sub-awards.
- No more paper routing forms for any proposal.
- Automatic notices for key personnel needing to complete COI disclosures.

Logging into RAPPORT

To log in to RAPPORT at [http://grants-rapport.dartmouth.edu/](http://grants-rapport.dartmouth.edu/), enter your NetID in the "User Name" field and enter your Dartmouth password in the Password field.

My Net ID __________________________

To look up your NetID: [http://tech.dartmouth.edu/its/services-support/help-yourself/netid-lookup](http://tech.dartmouth.edu/its/services-support/help-yourself/netid-lookup)

If you have forgotten your NetID Password, you can change it at: [http://tech.dartmouth.edu/its/services-support/help-yourself/knowledge-base/changing-your-password](http://tech.dartmouth.edu/its/services-support/help-yourself/knowledge-base/changing-your-password)

General Guidelines

RAPPORT Grants, at a minimum, is the mechanism for routing each proposal, the storage of all documents and the management of Awards. Additionally, RAPPORT Grants may be the system for submitting your proposal to Grants.gov. Any proposal, at a minimum, is comprised of the Funding Proposal Project Type. These proposal may be submitted by the PI or the OSP Grants Officer. Proposals that are submitted to Grants.gov are comprised of two project types – the Funding Proposal Project Type and a related SF-424 Project Type. The Funding Proposal Project Type is a series of "Views" (also referred to as SmartForms) that capture information about the proposed project. The information collected in the "Views" will be transferred to the SF-424 Project Type’s Forms. A Grants.gov proposal's budget is entered in the SF-424 Project Type’s Forms.

⭐ Please use the Funding Proposal Views to add and edit any information other than the budget. When non-budgetary changes are made in the SF-424 Forms, the changes will be overwritten by the Funding Proposal’s Create-Update SF424 activity. This activity is run frequently during the proposal creation and review steps by your Research Manager and the OSP Grants Officer.

Please allow sufficient time for the preparation of the proposal submission. Within RAPPORT, if a less common funding mechanism is being used, or if a funding mechanism is being used in a novel manner, the RAPPORT technical team may require time to investigate and implement an update to RAPPORT to accommodate the new or revised mechanism.

⭐ After 60 minutes of inactivity, you will be logged out for security reasons. Please be sure to save your work often.

⭐ You must enable web browser Pop-ups to allow RAPPORT to function properly.
Approvals

Acting on a notification email to make your Routing Approval or Submission Approval might be your most common activities in RAPPORT Grants. If you used RAPPORT Grants Express, I want to mention that Notifications have been improved to include a primary recipient and others who receive carbon copies. The Notification email will direct the recipient to perform an activity and tell the CC recipients that the email is informational only.

For the quickest system response, please jump to the proposal from the Notification. This is a quicker process than logging into RAPPORT Grants and navigating to the proposal.

Note: The sample Notifications below will look visually different in Outlook; however, the text of the message will be the same as you see here.

Routing Approval Notification

The link in this notification will take you to the (funding) proposal that requires you to act.

Once in the Funding Proposal Workspace, you will click on the ‘PI Routing Approval’ activity.

Figure 1: Routing Approval Notification

Figure 2: PI Routing Approval form
Submission Approval Notification

The link in this notification will take you directly to the proposal that requires you to act.

Once in the Funding Proposal Workspace, you will click on the ‘PI Routing Approval’ activity.

COI Disclosure Notification

The link in this notification will take you to the COI System.

Figure 3: PI Submission Approval Notification

Figure 4: PI Submission Approval form

Figure 5: PI COI Disclosure Notification
Reviewing Your Proposal

You have two options for the times that you wish to review your proposal. One option, at the time of making the “PI Submission Approval” is to have your Department Research Administrator (DRA) generate a PDF of the entire proposal if the proposal is submitted through Grants.gov. Alternately, you can review the Printer Version of the SF424 Project Type for a Grants.gov proposal. For other sponsors, you will find reviewing the Printer Version of the Funding Proposal.

At Both Routing Approval & Submission Approval Steps: Reviewing a Proposal Submitted to a Non-Grants.gov Sponsor

- Log into https://grants-rapport.dartmouth.edu
- View the proposal at the time of the Routing Approval
- Locate and open the appropriate proposal
- Click on the ‘Printer Version’ activity; note that attachments are accessible through hyperlinks within the Printer Version.

At Routing Approval Step: Reviewing a Proposal Submitted to Grants.gov

- Log into https://grants-rapport.dartmouth.edu
- View the proposal at the time of the Routing Approval
- Locate and open the appropriate proposal
- Click on the ‘Printer Version’ activity; note that attachments are accessible through hyperlinks within the Printer Version.

At Submission Approval Step: Reviewing a Proposal to be Submitted to Grants.gov

- Log into https://grants-rapport.dartmouth.edu
- View the proposal at the time of the Submission Approval
- Locate and open the appropriate proposal
- Click on the Sponsor Submission tab and then the ‘Name’ (hyperlink) of the SF424.
- Click on the ‘Printer Version’ activity; note that attachments are accessible through hyperlinks within the Printer Version.
PI Selects Proposal Not Ready To Submit

When, after the Grants Officer issues AOR Approval, you review the proposal and select ‘No’ as the response to the question “Is your proposal ready to submit?”, the proposal enters the state of ‘Pending PI Change’. Your DRA will receive an email notification and you will need to be in touch with the DRA about any correction(s). Once the correction(s) has been made, the DRA will contact you to say you can review the proposal, run the ‘Create-Update SF424’ (when applicable) and perform the ‘PI Submission Approval’ activity again.

**PI Submission Approval**

I hereby certify

1) that the information submitted within the application is true, complete and accurate to the best of my knowledge;

2) that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties; and

3) I agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of the application:

* I agree [ ]

To review your proposal, please click on the link below:

FP000000774

If your proposal is ready to be submitted, please answer ‘yes’ below, but if it requires a change, please select ‘no’ and your proposal will be moved into an editable state for you to make changes.

When you are done editing, click on this activity again, review your proposal and then select ‘yes’ only when you are ready for OSP to submit your application.

Is your proposal ready to submit?

* [ ] Yes  [ ] No  [ ] Clear
My Home

When you login, you reach the welcome page with the below banner. To find your work, click on the My Home link in the upper right corner of the banner:

The My Home page will open and the My Action Items tab displays current proposals that you are working on and require some action on your part.

The Funding Proposals tab gives you access to current or past proposals. In contrast to the proposals under the My Action Items tab, these current and past proposals no longer require you to take direct action – proposals may be in an approval or review state (e.g., Chair, Dean, OSP) or they may be submitted or withdrawn.

Editing Your Profile Information

FEATURE: The values of these attributes of your profile (Fig. 4) - Title, Full Address (including Zip code and County), Phone, e-mail Address, ERA Commons Log In (required on NIH applications), Degree, and Degree Year, can be edited by clicking on your name in the top green banner.

Key Concept: National Science Foundation proposals: For the PI (and Co-PIs) on a NSF proposal, there are two pieces of information in the RAPPORT Profile-HRMS record that must match your FastLane personal profile: email address and degree abbreviation/year conferred. If the email address does not match, FastLane will automatically create a new profile and you will not be able to view your proposal in FastLane. If the degree abbreviation or year does not match, then the submitted cover page will show “UKNW” as the highest degree and/or “1900” as the year of degree.

The SF424 application requires the nine-digit zip code, which is not available from the current HRMS feed into RAPPORT, so this must be entered into the PI Profile to prevent an error from being generated at submission. Please inquire with your Department Research Administrator (DRA) if you need to obtain the nine-digit zip code.
The ‘Title’ field is editable in case you would like to use a particular title (e.g., Professor, Director, etc.) on a specific application.

After you update your Profile information, click APPLY to save your changes. Changes will be applied to your Profile, so you will not have to edit this information for every proposal unless you want to change it.

![Figure 11: Person Profile](image-url)