

## Department Manage Ancillary Reviews Activity Instructions

Department Research Administrators (DRAs) will use this activity for Fiscal Office Review and Approval of Cost Sharing in Proposals.

Using the Manage Ancillary Reviews Activity for Fiscal Office Approval allows for a 'parallel' review process where the Fiscal Office can review/approve the proposal in any state. (Fiscal Officers can be entered on the regular routing path, however, Fiscal Office Approval will be required before a Proposal reaches OSP in that scenario.)

Please read the instructions carefully to learn where comments and documents need to be entered if you want them to appear in the Outlook notification that is sent to the Fiscal Office Reviewer.

NOTE: Please do not choose an 'organization' for approval as this prevent your proposal from moving forward.

### FIRST POP UP VIEW IN ACTIVITY:

Select a PERSON as your Fiscal Office Reviewer on the first pop up window of the activity:

#### Manage Ancillary Reviews

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

+ Add

Review Type	Organization	Person	Required
There are no items to display			

#### 2. Comments:

Comments entered here appear in the notification to the reviewer

#### 3. Supporting documents:

+ Add

Documents added here appear as a link in the notification to the Reviewer

Name
There are no items to display

OK

Cancel

## SECOND POP UP VIEW IN ACTIVITY:

- Where Person is chosen
- DO NOT CHOOSE ORGANIZATION
- DO NOT ADD COMMENTS
- DO NOT UPLOAD DOCUMENTS

Add

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

Organization:  ...

Person:  ...

### 2. \* Review Type:

▼

Fiscal Office

Other

Two Review Types

### 3. \* Response required?

Yes  No [Clear](#)

### 4. Comments:

Do Not Enter Text Here

### 5. Supporting documents:

+ Add

Documents added here only appear on the Activity Link on the FP History Tab - they do not show up for the Reviewer

Name

There are no items to display

\* Required

OK

OK and Add Another



Cancel

**AFTER CLICKING OKAY ON THE SECOND VIEW, USER COMES BACK TO THE FIRST VIEW:**

1. Check that correct Person is chosen
2. Add Comments Here
3. Add Documents Here
4. Click OK

**Manage Ancillary Reviews**



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

+ Add				
	Review Type	Organization	Person	Required
 Update	Fiscal Office		Test Dean1	yes 

**2. Comments:**

Comments entered here appear in the notification to the reviewer

**3. Supporting documents:**



+ Add	
	Name
 Upload Revision	This Doc Appears as a Link in Reviewer Email.pdf 

OK

Cancel

## ACTIVITY DETAILS APPEAR ON THE HISTORY TAB


Comments and documents added on first view appear on History Tab:

Budgets	Financials	History	Reviewers	Reviewer Notes	...
<b>Activity</b>		<b>Author</b>		<b>▼ Activity Date</b>	
 Ancillary Reviews Updated		Morgan, Stephanie		7/26/2019 1:29 PM	
Comments entered here appear in the notification to the reviewer					
 This Doc Appears as a Link in Reviewer Email.pdf					


To obtain additional information about the activity, click on the “Ancillary Reviews Updated” link on the history tab:

**Activity**

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 [Ancillary Reviews Updated](#)

Comments entered here appear in the notification to the reviewer

 This Doc Appears as a Link in Reviewer Email.pdf

All Documents uploaded in the activity – in the first and second windows – will appear here for reference. Click on a document if you want to open it:

<< Return to Workspace < Prev 1 / 8 Next >

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### Activity Details (Ancillary Reviews Updated) Activity that allows a specialist c reviews.

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**Author:** Stephanie Morgan (OSP Administration)

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**Logged For (Funding Proposal):** SS Upgrade Test

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**Activity Date:** 7/26/2019 11:03 AM

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Activity Form	Property Changes	Documents	Notifications
File on Second Pop Up Window.pdf		<b>All documents display here</b>	
File on First Pop Up Window.pdf			