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:

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

   ![Add button]

<table>
<thead>
<tr>
<th>Review Type</th>
<th>Organization</th>
<th>Person</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   There are no items to display

2. **Comments:**

   ![Comments entered here appear in the notification to the reviewer]

3. **Supporting documents:**

   ![Add button]

   ![Documents added here appear as a link in the notification to the reviewer]

   There are no items to display
SECOND POP UP VIEW IN ACTIVITY:

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

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

* Required
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.

<table>
<thead>
<tr>
<th>Review Type</th>
<th>Organization</th>
<th>Person</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Add</td>
<td>Fiscal Office</td>
<td>Test Dean1</td>
<td>yes</td>
</tr>
</tbody>
</table>

2. Comments:

   Comments entered here appear in the notification to the reviewer

3. Supporting documents:

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Add</td>
</tr>
<tr>
<td>+ Add</td>
</tr>
</tbody>
</table>

   | Upload Revision           |
   | This Doc Appears as a Link in Reviewer |
   | Email.pdf                 |
ACTIVITY DETAILS APPEAR ON THE HISTORY TAB

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

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

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

**Activity**

 '-') Ancillary Reviews Updated

Comments entered here appear in the notification to the reviewer

 ------------------------------------------------------------------------------------------------------------------------

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:

<table>
<thead>
<tr>
<th>&lt;&lt; Return to Workspace</th>
<th>&lt; Prev</th>
<th>1 / 8</th>
<th>Next &gt;</th>
</tr>
</thead>
</table>

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

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

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

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

<table>
<thead>
<tr>
<th>Activity Form</th>
<th>Property Changes</th>
<th>Documents</th>
<th>Notifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>File on Second Pop Up Window.pdf</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>File on First Pop Up Window.pdf</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All documents display here