# 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 ancilliary 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 Ancilliary Review

#### Geisel

Defaults to Chair

For limited scenarios requiring Dean's Office approval manage via Ancilliary 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.

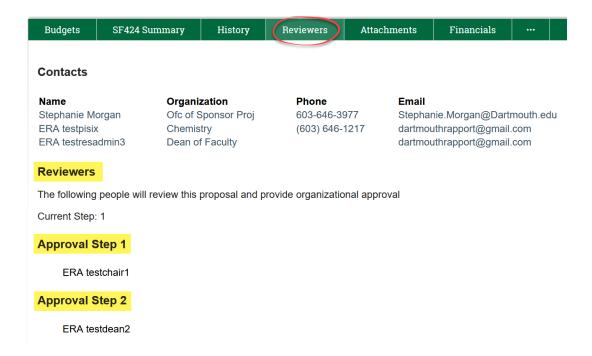
If the Chair is the PI, route the FP for their approval, then use Manage Ancillary Reviews to send additional approval if your division requires it.

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:



### When Reviewers Require Updating Before Routing

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

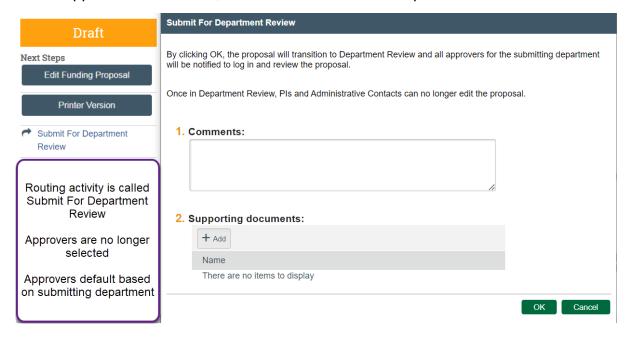
Do not route your proposal until the Grants Officer has notified you that the approver has been updated.

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

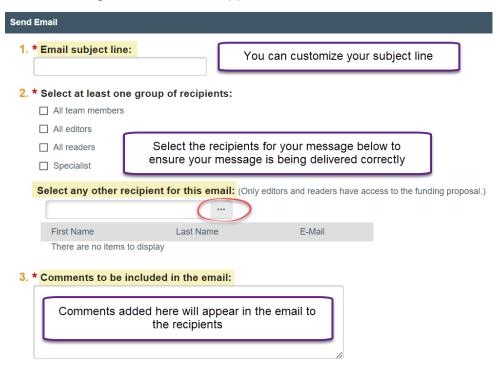
When the approvers are correct, click OK on Submit For Department Review to route the FP:



### 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.



## 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.).

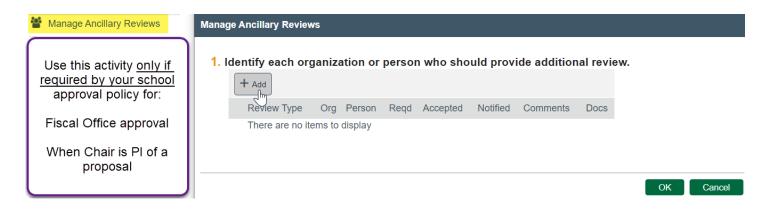
#### Fiscal Office Review

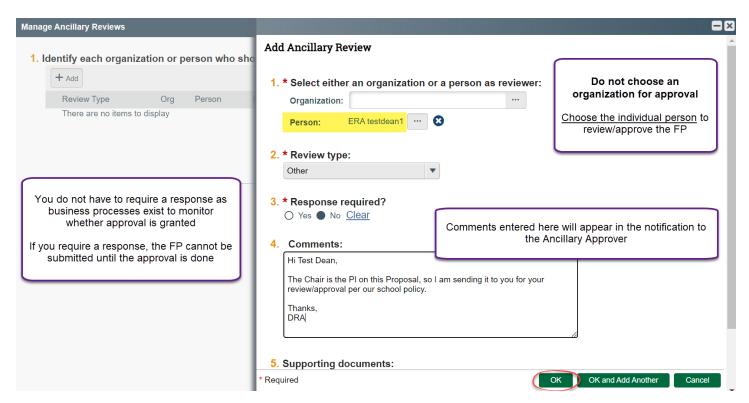
Fiscal Office Reviewers can no longer be added as approvers in the routing activity.

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.).

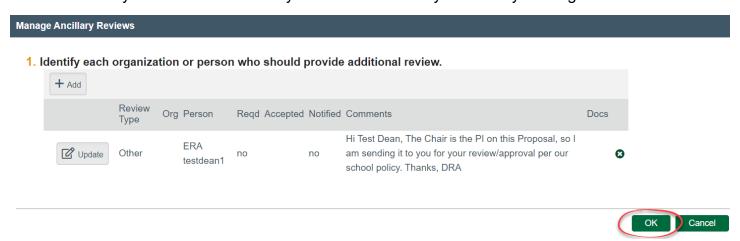
#### When the PI is the Chair

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





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



### **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>

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.