Step by Step Fiscal Office Proposal Review Guide

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Overview

This guide outlines the steps required by RAPPORT for a Chair to review a proposal.

The DRA routes to approvers

Draft → Dept Research Administrator Review → Department Chair Review → Other Department Reviews → OSP Grants Officer (GO) Review → OSP GO or PI → Grants.gov - Electronic Other - Paper

PI Routing Approval

Requirements:
- 'Required Action' Email Notifications sent to reviewers
- Reviewers can request modifications
- Review process varies by organization

PI Submission Approval

Must be completed before routing for dept. reviews

Must be completed after OSP approval, but prior to submission to Grants.gov

Generalized Proposal Flow Diagram

Two ways to access RAPPORT:

1) Click on link within the RAPPORT Grants Notification email, or
2) Login to website

1) Routing Review Notification

Open the email from ‘No-Replay@Rapport.Dartmouth.edu’ and click on the hyperlink in the blue type face.

RAPPORT Action Required - Review & Approval FP00000771_Res1

This proposal has been routed to you for your review.

Please click here FP00000771_Res1 to review and take appropriate action.
Using the notification thus, you navigate to the funding proposal workspace.

The easiest way to review the Funding Proposal, in more depth than the proposal workspace presents, is to right-click on "Printer Version" and select "Open link in new window" to open all views in a scrollable window.

Below is a section of the printer version:

Here the attachments can be reviewed; they can be opened by clicking on the file name.
Select the *Issue Fiscal Office Approval* activity from the menu to approve the proposal. If you wish any change to be made use the *Fiscal Office Requests Changes* activity to return the proposal to the DRA to make changes. The DRA and PI will resolve the issue(s), and return it to you to run the *Issue Fiscal Office Approval* activity.

The *Fiscal Requests Changes* activity will route the proposal back to the researchers so they can address the comments entered here.

Once the Fiscal Officer approves, the state of the proposal will change from ‘Fiscal Office Review’ to ‘OSP Grants Officer Review’.
You make also request another Fiscal Office to review the proposal.

2) Login to RAPPORT using your NetID and password

https://grants-rapport.dartmouth.edu/  

My NetID _________________________

To look up your NetID: 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

Your personal page opens when you click on "My Home":

"My Action Items" contains proposals needing your action.

When you have the funding proposal open follow the steps as given under Routing Review Notification.
Reviewing a Funding Proposal upon Request from OSP

An Office of Sponsored Projects Grants Officer, may decide that a funding proposal was not routed to all required reviewers. In such an eventuality, you may be asked to review a proposal out of the normal routing approval flow. You will receive an email notification that your action is required for a particular Funding Proposal in RAPPORT - Grants.

As the reviewer, respond, with your review of the proposal, by using the activity that is called Issue Reviewer Decision. Please note that your My Activities menu has different options than that menu when reviewing a typically routed proposal.

You will accept or decline or request changes be made by responding via the aforementioned activity. Then the Grants Officer will proceed based on the response that you issue.

Once you have completed the review via the Issue Reviewer Approval activity, the History Log will be stamped to show the activity.