

Approve Pre-award Record

Quick Reference Guide

Purpose: As an Approver you will review and approve a researcher's Pre-Award application before it

is processed by the Research Services Office.

Audience: Approver roles (e.g., Department Heads, ADRs, Dean, Research Administrator). Pls will also

display in the Academic Approvals section when a Team Member or Co-I submits a record

for their review.

Pre-requisite: Researcher (PI) has submitted their Pre-Award Application for academic approval.

Important: Records can <u>only</u> be approved from the Things to do list on your dashboard. If you view a record in any other way, you must return to your Things to do list to approve it.

Step 1:

Click **Pre-Award/Applications pending approval** in the **Things to do** section of the *Dashboard*.

Step 2:

Click the blue hyperlinked title to open a record. The record opens to the approval page.

From this approval page, you can either:

- approve/not approve a record,
- enter approver comments, or
- open the full record (to review it).

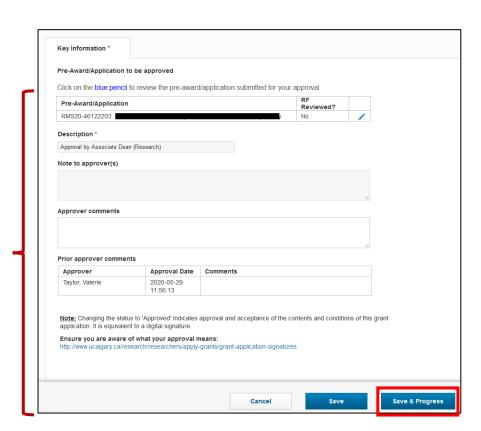
To approve a record:

Step 1:

Click Save & Progress.

This is the approval page







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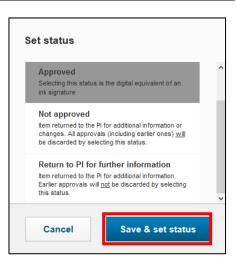
Step 2:

Select the status:

- Approved record proceeds to the next queued approver whose status changes to <u>Pending.</u>
- **Not approved** record returned to PI for additional information or changes. All approvals are discarded and the status of the record returns to In Preparation.
- Return to PI for further information record returned to PI for additional information or changes. Prior approvals are retained and the status of the record remains as <u>Submitted for Approval</u>.

Step 3:

Click Save & Set Status.



Note: The status of the record remains as Submitted for Approval until all academic approvals are completed. Once the last approver provides approval, the record's status will change to For Intake by Research Services.

To enter approver comments:

Step 1:

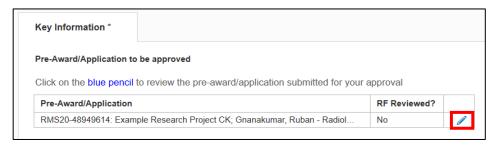
Under the Approver comments heading, add any comments that you want the PI to see.



To review the details of a record prior to approving it:

Step 1:

From the *approval page*, click the blue pencil icon.



Step 2:

Review the details of the pre-award/application by scrolling down to see the application details and documents. When reviewing the application you can click on the document icons to download *Letters of Support* and other supporting *Documents*. Approvers can also add documents if needed.

Last Updated: August 5, 2020



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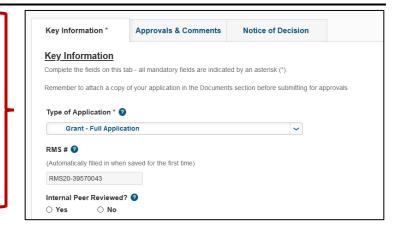
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Navigate to this page to view Pre-award details and supporting documents.

This screen will have 3 tabs:

- Key Information
- Approvals
- Notice of Award

You cannot Approve applications or edit fields from this view. Click Cancel & return to go back to the approval page.



Step 3:

To view the approval chain, click the *Approvals & Comments* tab to view approvers.

Note: Only when an approver has a Status of <u>Pending approval</u> can they approve or not approve a Pre-award record. At that point, this record will appear in their Dashboard Things to do list. The_next approver(s) in the queue display as <u>Queued for Approval</u>.



Note: The names listed under *Approval By* are all the people who can provide that level of approval. Each row only requires one of the people listed in that row for approval.

Step 4:

When your review is done, click **Cancel & Return.** This will exit the review screens and take you back to the initial approval screen where you can approve the record (see page 1 above).

Cancel & Return Status

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