

Adding/Removing an Approver

Purpose:

Research Facilitators and ADRs can add approvers for Pre-award records that have any of the following statuses:

- Submitted for Approvals
- Pending PI Information

Grants Assistant and Grants Officer can add approvers for Pre-award records that have any of the following statuses:


- Submitted for Approvals
 - Pending PI Information
 - For Intake by Research Services
 - For Review by Research Services
-

Audience:

ADRs, Research Facilitators, RSO

ADD AN APPROVER


Step 1

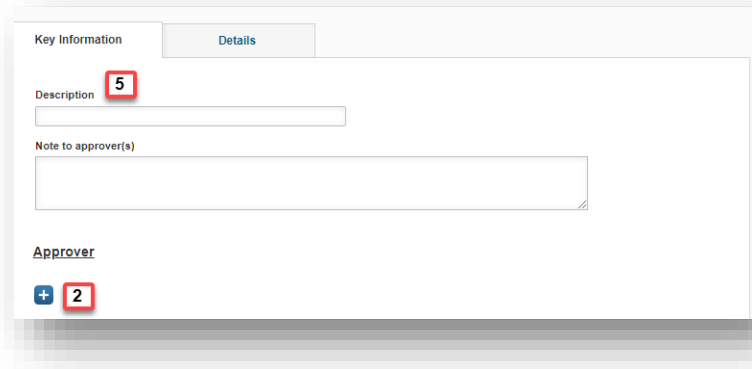
After opening a Pre-award record, click the  icon below the **Academic Approvals** section. The **Add Approver** page displays.




	Description	Status	Approval By	Approval Date	
1	Approved by Department Head / Equivalent	Approved	Dept Head1, Test	Wed Apr 03 16:06:42 UTC 2019	
2	Review by Research Administrator	Pending approval	Beug-Jang, Patty; Callaway, Dallas; Pringle, Jessica; Rai, Cristina; ResearchAdministrator1, Test; Siobozian, Jenna		
3	Approval by Associate Dean (Research)	Queued for approval	ADR1, Test, Turner, Raymond William		
+ 1					

Step 2

Click the  icon below **Approver**. The **Search options** display.




Key Information Details


Description 

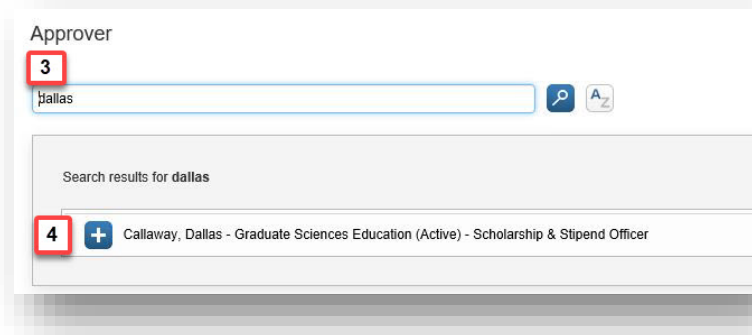
Note to approver(s)

Approver




+ 

Step 3


Enter the approver's name into the **Keyword** search field, or click the  icon and select a name from the list that displays.



Approver

Search results for dallas

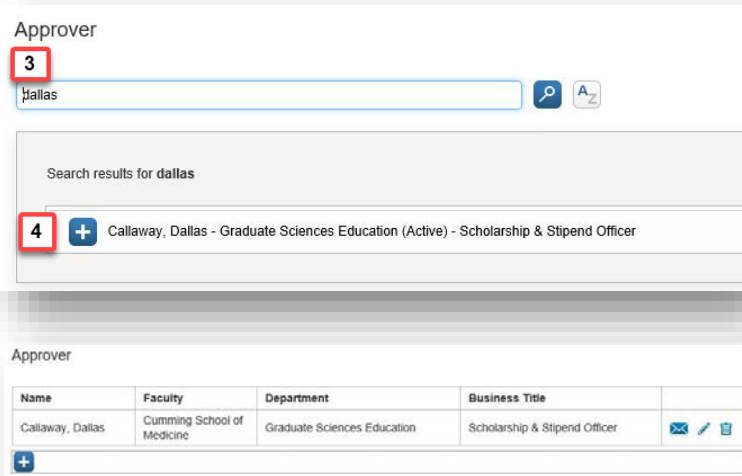
 Callaway, Dallas - Graduate Sciences Education (Active) - Scholarship & Stipend Officer

Step 4:

Click the **+** icon beside the approver's name. Details for the approver are populated into the fields.

Step 5:

Enter the approver's role name (e.g., Research Administrator) into the **Description** field. This **must be entered**, otherwise the approver role will not display in the **Description** field of the **Academic Approvals** table.



Approver

3

Dallas

Search results for dallas

4 + Callaway, Dallas - Graduate Sciences Education (Active) - Scholarship & Stipend Officer

Approver

Name	Faculty	Department	Business Title
Callaway, Dallas	Cumming School of Medicine	Graduate Sciences Education	Scholarship & Stipend Officer

Step 6:

Click **Save & Set Status**.

Step 7:

Select Queued for Approval.

Step 8:

Click **Save & Set Status**.

Step 9:

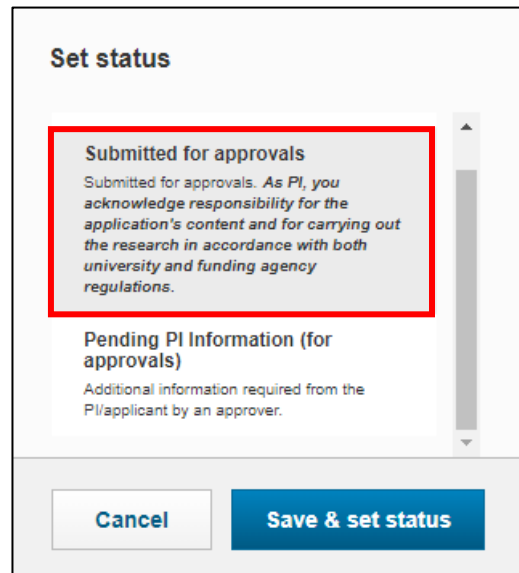
Click **Save & Progress**.

Step 10:

Select Submitted for Approval.

Step 11:

Click **Save & Set Status**. The new approver is added to the Academic Approvals list.



Set status

Submitted for approvals

Submitted for approvals. *As PI, you acknowledge responsibility for the application's content and for carrying out the research in accordance with both university and funding agency regulations.*

Pending PI Information (for approvals)

Additional information required from the PI/applicant by an approver.

Cancel Save & set status



A variety of circumstances (e.g., vacations, leaves, moves to other faculties, etc.) could require that an approver be discarded from a Pre-award record. Another example is where an ADR may choose to review Pre-award records with Special Requirements. In this case, they would remove the Research Administrator who is automatically added into the Academic Approvals when Special Requirements are selected.

Only certain roles within RMS (e.g., Research Facilitator, ADR, Grants Assistant, Grants Officer) have permission to discard approvers.

RMS retains a permanent record of discard approvers for tracking and audit purposes.

DISCARD AN APPROVER:

Step 1:

After opening the Pre-award record, click the **Approvals & Comments** tab.

Academic Approvals

	Description	Status	Approval By	Approval Date	
1	Approval by Department Head / Equivalent	Pending approval	Grondin, Sean Christopher		
2	Review by Research Administrator	Queued for approval	Pringle, Jessica; Raj, Cristina; Slobozian, Jenna		1
3	Approval by Associate Dean (Research)	Queued for approval	Turner, Raymond William		

Step 2:

Click the icon beside the approver you want to discard.

Step 3:

Click **Save**.

The approver moves from the **Academic Approvals** section to the **Discarded Approvals** section at the bottom of the page where it is permanently retained.