This document is intended for Grants Specialists and Authorized Organization Representatives.

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Software Overview and Basic Navigation

When you first log in, you will be on your My Inbox page. You can always get back to this page by clicking My Inbox in the top right.

Navigate My Inbox

From My Inbox, you will find:

1. **Logout** link to exit the system.
2. Your **Role**. If you have more than one role, select the appropriate role under My Roles. Roles determine what appears in My Inbox as well as your access to proposals, actions, and activities in the system.
3. **Tabs** listing funding proposals and SF424 applications in various stages of the process. Your role determines which tabs appear.

Open a Proposal

4. Click the appropriate tab. To find a specific proposal, see **Filter Data in a Table**.
5. Click the proposal name to open it.

The funding proposal workspace opens. See **Navigate Funding Proposal Workspace** for details.

View Proposal History

6. In the proposal workspace, click the **History** tab.
7. The history lists the activity taken on the proposal including any comments or attachments added.
Filter Data in a Table

To find a specific item in a table, use the Filter by feature:

8. Select the column to filter by.

9. Type the beginning characters for the items you want to find. You can also type a % symbol as a wildcard before the characters. For example:
   - 71 shows all items beginning with 71
   - %71 shows all items containing 71

10. For a list of operators you can type in the text box, click the Help icon.

11. Click Go to apply the filter.

12. To combine multiple filter criteria, click Advanced and then click Add Another Row.
When you open a proposal, you will see the proposal workspace:

1. **The State** of the proposal in the process. For example, Specialist Review means the proposal is currently undergoing review by the ORSP.

2. **Buttons** for activities related to proposal pages such as edit, view, or print pages, depending on your role.

3. **Actions** you can perform in the current state.

4. **Tabs** of information related to the funding proposal, SF424, and review process.

**Navigate Funding Proposal Pages**

A navigation bar appears at the top and bottom of each proposal page:

5. **Back** and **Continue** move you backward and forward through the pages. Continue saves your entries; Back does not.

6. **Save** saves your edits and **Exit** returns you to the proposal workspace. Save only appears if you can edit the proposal.

7. **Hide/Show Errors** shows a pane at the bottom of the page listing all pages with errors. If you can edit the proposal, you can fix the errors as follows:
   a. Click the **Jump To** link to go to that page and fix the error.
   b. Click **Refresh** to update the messages.

8. **Jump To** menu lists all the proposal pages. Select a page to jump to it.

9. **Finish** on the last page returns you to the proposal workspace.
Review a Funding Proposal

You will receive an email when a funding proposal is ready for you to review.

Open the Proposal

1. Click the proposal ID link to open the proposal.

   If you no longer have the email, you will find the proposal on the My Inbox tab.

Review the Proposal

2. Review the proposal:
   - Grants Specialists: Click Edit Funding Proposal. You can edit the proposal as needed.
   - Authorized Organization Representatives: Click View Funding Proposal.

3. To help with the review, you can:
   - Click Printer Version to print out the proposal pages.
   - Click View Differences to see what changed between this and a previous version.

Grants Specialists Only: To request changes from the proposal team, see Request Changes to a Funding Proposal.

When finished reviewing the proposal, go to Review and Update an SF424 Application.
Request Changes to a Funding Proposal

Grants Specialists can ask the proposal team to make changes to a funding proposal by adding reviewer notes to specific proposal pages. For a general change request that is not about a specific page, see Send Change Request to Proposal Team.

Add Reviewer Notes to Proposal Pages

1. Open the funding proposal.
2. From the proposal workspace, click Edit Funding Proposal or View Funding Proposal, depending on your role.
3. Navigate to the page to which you want to add a reviewer note and click Add in the Reviewer Note bar.
4. Type your change request in the Note box and click OK.
5. When done adding notes, exit the proposal.
6. Send the reviewer notes to the proposal team via a change request (steps below).

Send Change Request to Proposal Team

To send the proposal back to the proposal team with the reviewer notes or a general change request:

6. In the proposal workspace, click Specialist Requests Changes.
7. If the proposal should go back through a department review, select the check box.
8. Type a comment or change request in the Comments box.
9. Click OK.
Review and Update an SF424 Application

The Grants Specialist can review and manually update the SF424 application as necessary.

Review and Update the SF424 Application

1. Open the funding proposal.
2. From the proposal workspace, click the SF424 Summary tab.
3. Click the SF424 ID link.
4. In the SF424 workspace, click Edit Grant Application.
5. To add an optional form, select the form check box and then click Continue to update the form.
6. To review or update an existing form, click the link to open it. Edit the form as needed.
7. Click Save and then Exit to return to the SF424 workspace.

Validate the SF424 Data

8. In the SF424 workspace, click Validate Submission.

The system not only validates the application, but builds an XML version of it.

Fix any errors listed in the Error/Warning Messages pane by manually updating those pages (steps above). Click Validate Submission again to ensure no errors.

When finished updating and validating the SF424 application, go to Approve a Funding Proposal and SF424 Application.
Approve a Funding Proposal and SF424 Application

After you have reviewed the funding proposal and SF424 application and all updates have been made, "approve" the proposal by moving it to the next state in the proposal submission process.

Approve Proposal

After you have reviewed the proposal and SF424 application perform the next step depending on your role:

Grants Specialists:

1. From the proposal workspace, click Submit for SO Final Review.
2. Add any comments, if applicable, and click OK.

Authorized Organization Representatives:

Go to Submit an SF424 Application to Grants.gov.
Submit an SF424 Application to Grants.gov

An Authorized Organization Representative can submit the application to Grants.gov during the SO Final Review state.

Submit SF424 Application to Grants.gov

1. Open the funding proposal.
2. From the proposal workspace, click the SF424 Summary tab.
3. Click the SF424 ID link.
4. In the SF424 workspace, click Submission Pre-Check to verify that the generated XML is error-free.
5. Click Submit to GrantsGov.
6. In the confirmation window, click OK to submit the application.
7. Click the proposal name in the breadcrumb link to return to the proposal workspace.

Go to Indicate Application Accepted.

Indicate Application Accepted

Perform these steps only after the application has been accepted by eRA Commons with no warnings or errors.

8. Click Notification Submitted via GrantsGov.
9. Type any comments regarding the submission.
10. Click OK.

When the proposal transitions to the Pending Sponsor Review state, the funding proposal submission process is complete.
Bypass Department Review and Approval

When a proposal is in certain states, Grants Specialists and Authorized Organization Representatives can bypass the department review and go right to a Specialist Review, for example, if a department review cannot be performed in time to meet a sponsor deadline. When this occurs, however, the technical/scientific portion of the proposal is considered complete.

**Bypass Department Review**

1. Open the proposal in Draft state.
2. Click **Bypass Review and Approvals**.
3. Type the reason for bypassing the department review and approval.
4. Click **OK**.

The proposal transitions to Specialist Review. Go to [Review a Funding Proposal](#).

When a proposal transitions to Pending Sponsor Review, the PI and department approvers will receive an email to perform retroactive approvals.

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[Review a Funding Proposal](#)