This document is intended for Department Administrators and Department Reviewers.

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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. **Tabs** listing funding proposals in various stages of the process as well as the reports available to you. The text at the top of the page describes the tabs.
3. **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.

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.
Navigate Funding Proposal Workspace

When you open a proposal, you will see the proposal workspace:

1. **The State** of the proposal in the process, for example, Department Review.
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.
5. **The Contacts and Reviewers** tab lists the reviewers and approvers for the proposal.

**Navigate Funding Proposal Pages**

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

6. **Back** and **Continue** move you backward and forward through the pages. Continue saves your entries; Back does not.
7. **Save** saves your entries and **Exit** returns you to the proposal workspace. Save only appears if you can edit the proposal.
8. **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.
9. **Jump To** menu lists all the proposal pages. Select a page to jump to it.
10. **Finish** on the last page saves your proposal and returns you to the proposal workspace.
Review and Approve a Funding Proposal

You will receive an email when a proposal is ready for you to review. **Note:** To make a submission deadline, a Grants Specialist or Authorized Organization Representative may decide to bypass the department review to ensure the proposal is submitted to the sponsor on time. In this situation, department approvals will be collected later.

**Review a 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.

2. Click **View Funding Proposal** and review the proposal pages.
   - To print out the proposal, click **Printer Version**.
   - To see what changed between this and a previous version, click **View Differences** and select the version to compare against.

To request changes from the proposal team, see **Request Changes to a Funding Proposal**.

When finished reviewing the proposal, approve it (steps below).

**Approve a Proposal**

After you have finished reviewing the proposal and all requested changes have been made, approve the proposal.

3. From the proposal workspace, click **Issue Departmental Approval**.

4. Add any comments about the approval, if applicable, and click **OK**.
# Request Changes to a Funding Proposal

You can ask the proposal team to make changes to a funding proposal by adding reviewer notes to specific proposal pages. To make 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 funding proposal workspace, click **View Funding Proposal**.
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.

   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 funding proposal workspace, click **Department Requests Changes**.
7. Type a comment or change request in the Comments box.
8. Click **OK**.