

How to Approve a Proposal

OPTION #1: Access Proposal through SmartGrant Login Screen

To access **SmartGrant** open the web browser and navigate into the PROD account.

Click **Continue**

The logo for SmartGrant, with the word 'Smart' in blue and green, and 'Grant' in red and blue.

Continue

Enter the User Login Information

- Enter **Login ID**
- Enter **Password**

Click **Submit**

User Login

Login ID

Password

Submit

Reset

How to Approve a Proposal

After successful login to SmartGrant, users that are approvers with proposals requiring review at their level will have an active "Routing Approvals" option under the To Do List.

Click **Routing Approvals—View Detail**

Pre-Award ▾ Last GPID ▾ Get Proposal ▾ Award Functions Last GAID ▾ Get Award ▾ Profiles ▾ Admin ▾ Account ▾ Reports ▾

Julie King (Clone 2)

To do list

Routing Approvals
View detail

Deliverables
View detail

IPF Items
View detail

Proposal Due Dates
View detail

A complete list of proposals waiting for approval by the user will display. List includes GPID#, Due Date, and Approval Level (if user has multiple approval roles at the organization). Data can be sorted by active column headers. To open proposal for required review and approval, click **GPID#**.

Back to main menu

Pending Routing Actions					count of 3
GPID	PI Name	Sponsor	Due Date	Approval Level	
10057	Reed, Beth P. (Sr)	NIH	02/15/2019	Dir Fin Svcs	
10501	Reed, Beth P. (Sr)	NIH	02/01/2019	Dir Fin Svcs	
11159	Kosko, Bart P.	VAMHC	02/05/2019	President	

How to Approve a Proposal

Proposal will open. Select **Submittal Processes**→**Online Routing** to access the routing and approval page.

GPID#: 10057 Log #: [redacted] Status: IPEN
 Title : Grants.gov Test Proposal by JUK: 12/7/09
 PI (1): Reed, Beth P. (Sr) National Inst [redacted] Search Project (Traditional)

Item	Submission Status	Item	Status
Budget Periods Created	✓	On-Campus	✓
Cost type	✓	PI Effort has been requested	✓
Due Deadline	✓	Principal Investigator	✓
End Date	✓	Proposal Type	✓
Fiscal Year Basis Selected	✓	Sponsor Selected	✓
Grant/Cont/CoopAgree Selected	✓	Start Date	✓
Includes Burden?	✓	Submission Type	✓
Indirect Cost Rate Entered	✓	Title has been entered	✓
Off-Campus	✓		

The proposal approval page will show the approver's level as pending—with a "clock" icon next to it. The proposal approval page will automatically open with the "Accept Proposal" option highlighted. A "Hold Proposal" option is grayed out but can be selected if approver is not yet ready to enter their approval. Selecting to "hold a proposal" will keep the proposal at current approver's level and resend a routing email notification link to the level.

Back to main menu Attachments Proposal Info FastGrant CommLog Cancel Routing Modify Level

Proposal Approval

Comments:

Comments

Update

Status: ☐ (none) ☐ pending ☒ Approved

☒ PI - Principal Investigator
 Reed, Beth P. (Sr)

Approved by:
 Beth Reed
 9/23/2011 10:38:21 AM

☒ Dir Fin Svcs - Designated Research
 Administrator

Sandra Truman
 dbozler@erasoftware.com

How to Approve a Proposal

If you are the PI approving the proposal, you will see a statement of proposal acceptance terms and conditions on the routing screen. Only the PI level will have the statement display on the proposal approval page.

At the top of the proposal approval page, options to view proposal information will be available to all approvers.

Click on **Attachments** to view the Budget worksheets (if generated), any proposal related document (if uploaded), and proposal forms (if a non-FastGrant proposal).

Click on **Proposal Info** to view a summary page of proposal information.

Click on **FastGrant** (if a FastGrant proposal) to view Grants.gov forms included with the submission.

Click on **CommLog** to enter any notes or communications about the proposal.

Click on **Cancel Routing** to clear any previous approvals and start over again with the routing process.

Click on **Modify Level** if changes need to be made to the routing list. Changes can only be made to levels AFTER the current approval level.

Back to main menu Attachments Proposal Info FastGrant CommLog Cancel Routing Modify Level

Proposal Approval

Comments:

Comments

Update

Status : ☐ (none) ☐ pending ☒ Approved

<input checked="" type="checkbox"/>	PI - Principal Investigator Reed, Beth P. (Sr)	Approved by : Beth Reed 9/23/2011 10:38:21 AM
<input type="checkbox"/>	Dir Fin Svcs - Designated Research Administrator	Sandra Truman dboxler@erasoftware.com

How to Approve a Proposal

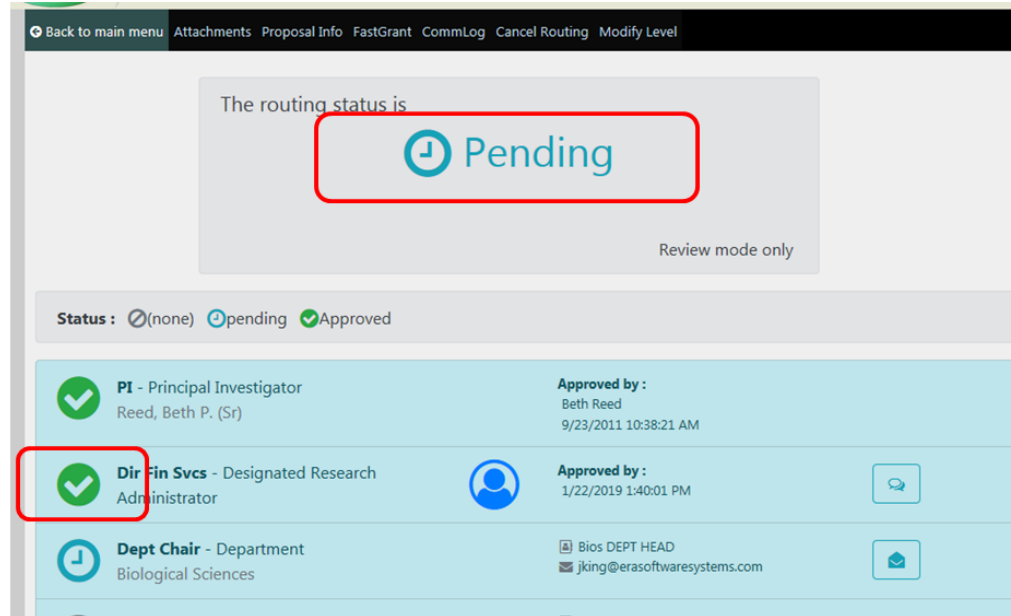
When an approver is ready to approve, optional comments can be entered that will be retained on the proposal routing page as well as included in the routing email sent to the next level in the approval sign-off.

Click **Update** to enter and save the approval.

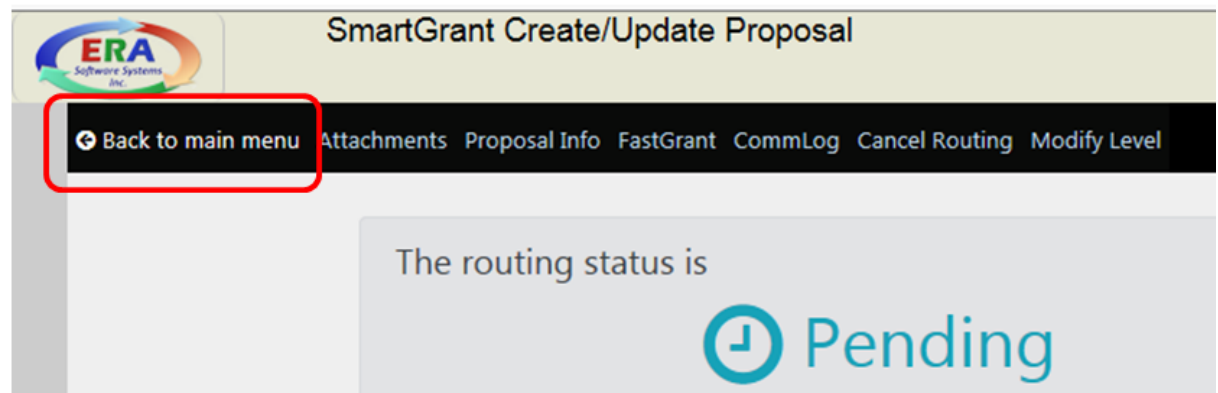
The screenshot displays a web interface for proposal management. At the top, a navigation bar includes links: Back to main menu, Attachments, Proposal Info, FastGrant, CommLog, Cancel Routing, and Modify Level. Below this, there are two buttons: 'Accept Proposal' (highlighted with a green box) and 'Hold Proposal (enter comments only)' (highlighted with a grey box). A red rectangle encloses the 'Comments:' section, which contains a text area with the text 'Approval okay with supporting documentation as provided by sponsored research--ST.'. Another red rectangle highlights the 'Update' button located at the bottom right of the comments section. Below the comments area, a status bar shows 'Status : (none) pending Approved', with 'Approved' selected. The bottom section is divided into two rows. The first row shows a green checkmark icon next to 'PI - Principal Investigator' and 'Reed, Beth P. (Sr)', and 'Approved by : Beth Reed 9/23/2011 10:38:21 AM'. The second row shows a clock icon next to 'Dir Fin Svcs - Designated Research Administrator', a user icon next to 'Sandra Truman', and an email icon next to 'dbozler@erasoftwaresystems.com'.

How to Approve a Proposal

After updating, the proposal routing page refreshes to reflect a “Pending” status—indicating there are still other approvers that must review and approve. For the approver, their level now shows a “check” icon as confirmation that approval task is complete.



To exit out of the proposal routing page, click **Back to main menu** located in the menu bar at top of page.

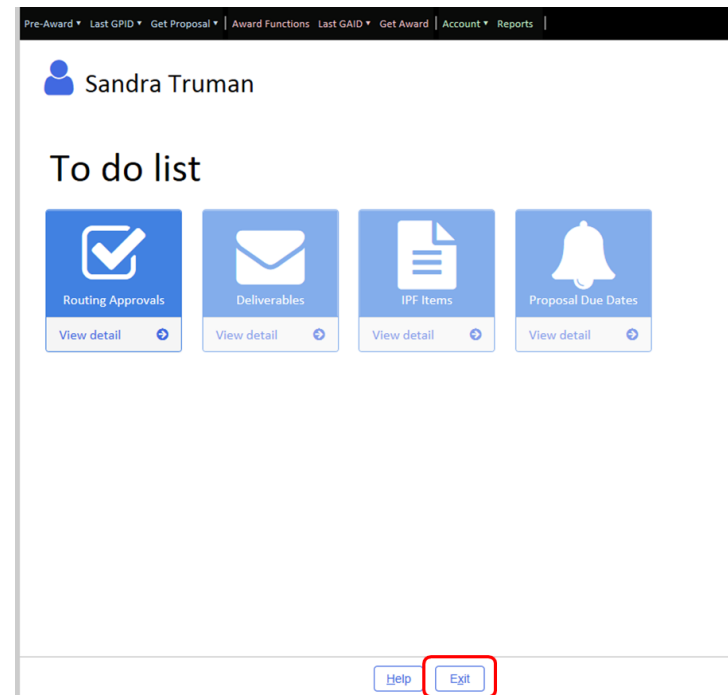


How to Approve a Proposal

To exit out of the proposal, click **Back To Do List** located in the menu bar at the top of the page. Click Save or OK to any messages.



If approvals are required on other proposal, click the Routing Approvals—View Detail. Otherwise, if ready to shut down the SmartGrant session, click **Exit** at the bottom of the page.



How to Approve a Proposal

OPTION #2: Access Proposal through Routing Email

If you are the next approver required to review and approve a proposal in routing, then you will receive a routing email notification with a subject header of "SmartGrant Notification".

To access the SmartGrant Proposal—Click on the hyperlink embedded in the routing email notification.

SmartGrant Routing Memorandum 1/22/2019 1:40:01 PM

From

Email

Phone

Fax

Proposal 10057

Sponsor National Institutes of Health

Title Grants.gov Test Proposal by JLK: 12/7/09

PI Reed, Beth P. (Sr)

Action NEXTAPPROVER

You have been requested to review this proposal.

Use the hyperlink from this email to go directly to the review and approval page, or login to SmartGrant and check your To-Do List
<https://dev7.erasoftware.com/Routing8/Login.aspx?ID=a012b69726734fdb9a51d88ef78751b>

Reviewer Comments

Approval okay with supporting documentation as provided by sponsored research—ST.


How to Approve a Proposal

Enter the User Login Information

- Enter **Login ID**
- Enter **Password**

Click **Sign In**

Sign in to SmartGrant



Login ID

Password

☐ Remember me

Sign in

How to Approve a Proposal

If you are the PI approving the proposal, you will see a statement of proposal acceptance terms and conditions on the routing screen. Only the PI level will have the statement display on the proposal approval page.

At the top of the proposal approval page, options to view proposal information will be available to all approvers.

Click on **Attachments** to view the Budget worksheets (if generated), any proposal related document (if uploaded), and proposal forms (if a non-FastGrant proposal).

Click on **Proposal Info** to view a summary page of proposal information.

Click on **FastGrant** (if a FastGrant proposal) to view Grants.gov forms included with the submission.

Click on **CommLog** to enter any notes or communications about the proposal.

Click on **Modify Level** if changes need to be made to the routing list. Changes can only be made to levels AFTER the current approval level.

Routing Attachments Proposal Info FastGrant CommLog Modify Level Help Exit

Proposal Approval

Comments:

Comments

Status : ☐ (none) ☐ Pending ☒ Approved

<input checked="" type="checkbox"/>	PI - Principal Investigator Reed, Beth P. (Sr)	Approved by : Beth Reed 9/23/2011 10:38:21 AM
<input checked="" type="checkbox"/>	Dir Fin Svcs - Designated Research Administrator	Approved by : Sandra Truman 1/22/2019 1:40:01 PM
<input type="checkbox"/>	Dept Chair - Department Biological Sciences	Approved by : Bios DEPT HEAD jking@erasoftware.com
<input type="checkbox"/>	Spon Progs - Sponsored Programs	Approved by : Julie King jking@erasoftware.com 562-983-7512

How to Approve a Proposal

The proposal approval page will show the approver's level as pending—with a "clock" icon next to it. The proposal approval page will automatically open with the "Accept Proposal" option highlighted. A "Hold Proposal" option is grayed out but can be selected if approver is not yet ready to enter their approval. Selecting to "hold a proposal" will keep the proposal at current approver's level and resend a routing email notification link to the level.

When an approver is ready to approve, optional comments can be entered that will be retained on the proposal routing page as well as included in the routing email sent to the next level in the approval sign-off.

Click **Update** to enter and save the approval.

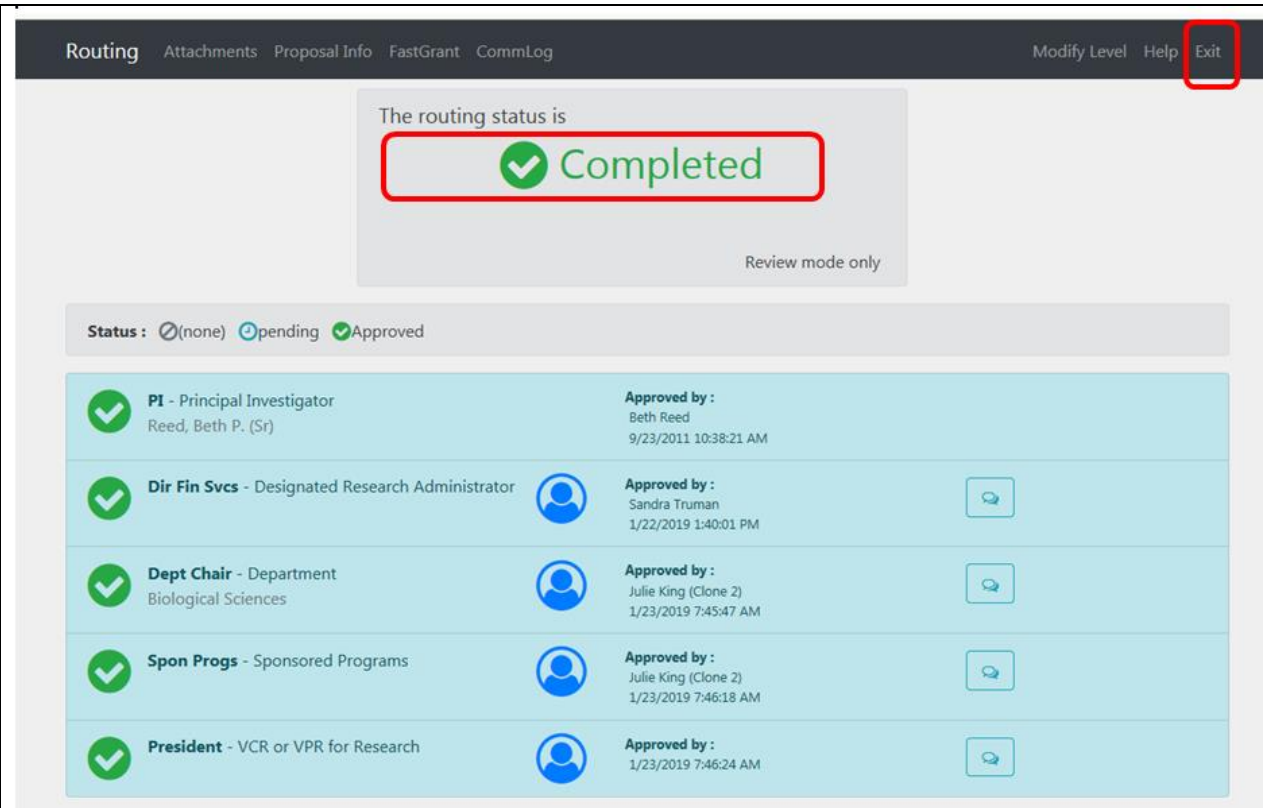
The screenshot shows the 'Proposal Approval' interface. At the top, there are tabs: Routing, Attachments, Proposal Info, FastGrant, and CommLog. On the right, there are links: Modify Level, Help, and Exit. The main section has two buttons: 'Accept Proposal' (highlighted with a red box) and 'Hold Proposal (enter comments only)' (grayed out). Below these is a 'Comments:' section with a text box containing 'Approval okay with department' (also highlighted with a red box). At the bottom right of this section is an 'Update' button (highlighted with a red box). Below the comments section is a 'Status' bar with radio buttons for (none), pending, and Approved. The bottom part of the screen shows a list of approvers:

Approver	Status	Approved by	Approved on
PI - Principal Investigator Reed, Beth P. (Sr)	Approved	Beth Reed	9/23/2011 10:38:21 AM
Dir Fin Svcs - Designated Research Administrator	Approved	Sandra Truman	1/22/2019 1:40:01 PM
Dept Chair - Department Biological Sciences	Pending	Bios DEPT HEAD jking@erasoftware.com	

How to Approve a Proposal

After updating, the proposal routing page refreshes to reflect a "Pending" status indicating there are still other approvers that must review and approve or a "Completed" status indicating approver was last level to approve. For the approver, their level now shows a "check" icon as confirmation that approval task is complete.

After the approval is complete, the approver should always click **Exit** at top of screen to end the SmartGrant approval session.



The screenshot displays the SmartGrant proposal routing interface. At the top, a navigation bar includes links for Routing, Attachments, Proposal Info, FastGrant, and CommLog, along with utility links for Modify Level, Help, and Exit. The main content area shows the routing status as 'Completed' with a green checkmark icon. Below this, a status legend indicates that 'Approved' is the current status. A table lists the approvers, their roles, and the dates/times they approved the proposal.

Role	Approved by	Approved on
PI - Principal Investigator Reed, Beth P. (Sr)	Beth Reed	9/23/2011 10:38:21 AM
Dir Fin Svcs - Designated Research Administrator	Sandra Truman	1/22/2019 1:40:01 PM
Dept Chair - Department Biological Sciences	Julie King (Clone 2)	1/23/2019 7:45:47 AM
Spon Progs - Sponsored Programs	Julie King (Clone 2)	1/23/2019 7:46:18 AM
President - VCR or VPR for Research	1/23/2019 7:46:24 AM	

NOTES: