RAMP Grants Test Site URL
Department Review

RAMP Test Site: https://mpclkfsustage4.huronclick.com/GrantsUAT

Log your feedback/issue found: http://tinyurl.com/ramp-grants

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Exercise 1: Review Submission

The funding proposal submission is routed to a test department, RAMP Department, which is set up with 2 approver levels. In this exercise, you will log in as a Level 1 approver and send the submission back for clarification.

Level 1	Level 2	Level 3	Level 4
1. Emily (**Username**: level1a)	1. David (**Username**: level2a)	N/A	N/A
2. Ryan (**Username**: level1b)	2. Lisa (**Username**: level2b)		

- ☐ Log in as anyone from the Level 1 column, **Password:** myramp2020!
- ☐ From the Dashboard, click on your assigned funding proposal. You are now directed to the funding proposal workspace.
- ☐ Click on the "**Review Funding Proposal**" button to access the funding proposal SmartForm.

- ☐ Review information on the SmartForm and **add Reviewer Notes** to any fields on any page of the SmartForm. Notice the color changes after the comment is added. To add Reviewer Notes, look for the following icon:

- ☐ Scroll down to the "Above section has been reviewed: ☐" checkbox and **check the box**. Notice the color changes.

ⓘ The action of checking the box to indicate review completion per section is optional. You are not required to check this box for every section during Department Review.
- ☐ **When you are done reviewing the SmartForm, click Exit**. You are now directed to the funding proposal workspace.
- ☐ View other areas of the funding proposal workspace (i.e., working budgets information in the Budgets tab, History tab, Reviewers Tab, etc.)
- ☐ From the funding proposal workspace, **click on the "Request Changes"** activity to send the submission back for clarification.

- ☐ Click OK on the form. Notice the status changes from "Department Review" to "Department Review: Response Pending from PI".

Exercise 2: Re-Submission

The funding proposal submission has been routed back to the PI for changes. You will now log in as the PI and make modifications to the submission and re-submit it back to Department Review.

☐ Log in as the PI, **Username**: mypi2 **Password**: myramp2020!
☐ Validate that you can find your assigned funding proposal in My Inbox tab.
☐ Click on the link to navigate to the funding proposal workspace.
☐ Click on the "**History**" tab - view the information.
☐ Click on the "**Edit Funding Proposal**" button to access the funding proposal SmartForm.

☐ Navigate through the SmartForm pages with Reviewer Notes, click on the Reviewer Notes icon to view details. Reply to the Reviewer Notes, if applicable.
☐ Make at least 1 change on any page of the SmartForm.
☐ Exit out of the SmartForm to be directed to the funding proposal workspace.
☐ Click on the "Submit Changes To Department Review" activity.

☐ Click OK on the form. Notice the status changes from "Department Review: Response Pending from PI" to "Department Review".

Exercise 3: Approve Submission

The funding proposal submission is now sent back to Department Review. You will log back in as a Level 1 approver, approve the submission to send it forward to Level 2 approvers. You will then log in as a Level 2 approver and approve the submission to send it forward to Specialist Review.

Level 1	Level 2	Level 3	Level 4
1. Emily (**Username**: level1a)	1. David (**Username**: level2a)	N/A	N/A
2. Ryan (**Username**: level1b)	2. Lisa (**Username**: level2b)		

☐ Log in as anyone from the Level 1 column, **Password:** myramp2020!
☐ Validate that you can find your assigned funding proposal in My Inbox tab.
☐ Click on the link to navigate to the funding proposal workspace.
☐ Click on the "**Review Funding Proposal**" button to access the funding proposal SmartForm.

- ☐ Notice how RAMP indicates in the SmartForm when there are:
  - ⓘ Responses to Reviewer Notes
  - ⓘ Changes to the SmartForm
- ☐ Click Exit. You are now directed to the funding proposal workspace.
- ☐ Click on the "**Reviewers**" tab. View information on this tab.
- ☐ Click on the "**Approve**" activity.

  ✔ Approve

- ☐ Click OK on the form. Notice that the status remains at "Department Review"; the information on the "Reviewers" tab is updated to show that the Department Review is at Level 2.
- ☐ Click on the "**History**" tab. View the information on this tab.
- ☐ Log off as Level 1 approver.
- ☐ Log in as anyone from Level 2 column, **Password**: myramp2020!
- ☐ Validate that you can find your assigned funding proposal in My Inbox tab.
- ☐ Click on the link to navigate to the funding proposal workspace.
- ☐ Click on the "**Review Funding Proposal**" button to access the funding proposal SmartForm.
- ☐ When review is complete, click Exit. You are now directed to the funding proposal workspace.
- ☐ Click on the "**Approve**" activity.

  ✔ Approve

- ☐ Click OK on the form. Notice that the status changes from at "Department Review" to "Specialist Review".
- ☐ Click on the "**History**" tab. View the information on this tab.
- ☐ Log off as Level 2 approver.

Appendix

In some cases, ancillary reviews may be required (i.e., additional reviews required by specific units such as the Research Compliance Office, Research Legal Office, or Office for Human Subjects Protection; or additional reviews required by collaborating departments).

ⓘ Ancillary reviews are carried out in parallel with standard review cycles.

ⓘ If additional reviews are required by collaborating departments, you can route the funding proposal for their review by adding the collaborating department an ancillary review department.

ⓘ **In order to be able to assign ancillary reviewers to the funding proposal submission, the user must be listed as an administrative contact or as a proposal team member with edit rights.** This can be done on question 4A and 4B on the "Personnel" page of the Funding Proposal SmartForm.

To assign ancillary reviewers:

In this test exercise, Ryan, a Level 1 approver, is an administrative contact.

☐ Log in as Ryan, **Username**: level1b **Password**: myramp2020!

☐ Navigate to your assigned funding proposal workspace.

☐ Click on the "Manage Ancillary Reviews" activity.

☐ On the Manage Ancillary review form, click **Add**.

☐ On the Add Ancillary Review form:

    1) Organization: Type Medicine Clinical Sciences (example where Medicine Clinical Sciences is a collaborating department)

    2) Select review type.

    3) Select whether this ancillary review is required.

    4) Click OK.

☐ When finish adding reviewers, add comments or supporting documents as necessary, then click OK on the Manage Ancillary Reviewers form. You are now directed to the funding proposal workspace.

    ⓘ To check the progress of an ancillary review at any point, navigate to the Reviewers tab