First Request an Ancillary Review

From the Funding Proposal workspace, you will perform the “Manage Ancillary Reviews” activity to obtain departmental approval for the advance. On the “Manage Ancillary Reviews” form click the +Add button, complete only the required fields on the “Add Ancillary Review” form, click **OK**, and complete the “Manage Ancillary Reviews” form by inserting required comments and supporting documents, and then click **OK**.
The “Ancillary Reviews Update” activity appears on the History tab, and an Outlook email notification is sent to all assigned department approver(s).
The departmental ancillary reviews are performed in parallel to the Specialist’s review of the request and award setup; however, the Specialist will not submit for Central Office approval until the departmental ancillary review has been accepted and completed.

Example of a Level 1 Approval

Note the Level 1 Approver has accepted the review and performed the “Submit Ancillary Review” with comments. Status of the ancillary review may be viewed on the Funding Proposal workspace Reviewers tab. Comments may be viewed on the History tab.

Example of a Level 2 Approval

Notice the Level 2 Approver has accepted the review and marked the review as completed. The Level 2 Approver’s comments may be viewed on the Funding Proposal workspace History tab.
Notify SPO of Grant Status

The Study Staff notifies the central research administration office that the PI wishes to request an advance by performing the “Notify SPO of Grant Status” activity. The Study Staff will click on the Grants tab and select the Funding Proposal menu, then click on the Sponsor Review tab to open the Funding Proposal workspace for the anticipated award.

Open the Funding Proposal workspace, click the “Notify SPO of Grant Status” activity.
1. In the "Notify SPO of Grant Status" window, select "Award Anticipated" as the Grants status.
2. In the Comments field, enter a brief comment indicating the PI is requesting an Advance.
Once you click OK, the state of the Funding Proposal changes to “SPO Status Confirmation.” The Specialist receives an Outlook email notification of the status.

**Note:** The Specialist may need to request clarifications. (See How to Respond to a Clarification Request) The Specialist may also decline the request.

If clarification is not requested the Specialist will initiate the “Create Funding Award.”

Once the Specialist has established the award record in RAMP Grants, the Specialist will perform the “Send Email” activity requesting department edits.

Example of “Send Email” from Specialist to Study Staff:

Click the link in the Outlook email notification to be directed to the newly created award workspace. Click the “Edit Award” button, navigate to the Budget Reconciliation form, and select the budget allocation to display. Make adjustments to the budget to reflect the amount of funds to be advanced.
Complete the rest of the requested edits, and then perform the “Send Email” activity to notify the Specialist that the edits are complete.

Example of “Send Email” from Study Staff to Specialist:
Once the departmental ancillary review and departmental edits are complete, the Specialist will perform the "Manage Ancillary Reviews" activity to obtain Central Office approval of the advance request. Once the Central Office marks the ancillary review as completed, approving the advance request, the Specialist will perform the "Funding Anticipated" activity in the Funding Proposal workspace. The state of the Funding Proposal changes to **Pending Sponsor Review Award Anticipated.** The Specialist sends the award to final review.