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1 Welcome to Princeton ERA Proposals

As of 8/31/2020, Princeton ERA is Princeton’s system for:

- Developing and tracking proposals in the Grants module
- Tracking funded and non-funded research agreements in the Agreements module
- Tracking negotiation of subaward initiations + modifications, also in the Agreements module

As a department reviewer, you will learn:

- What to do when you receive email that a proposal is ready for your review
- The mechanics of reviewing a proposal and adding reviewer notes
- How to request changes from the proposal Admin Contact or Editors
- How to approve the proposal
- What happens after you approve the proposal
- How to navigate through Princeton ERA to find proposals you need to approve
- How to see who the other department reviewers for the proposal are

1.1 Basic Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Proposal or FP</td>
<td>Sponsored research proposal in Princeton ERA.</td>
</tr>
<tr>
<td>Admin Contact</td>
<td>The main department administrator responsible for developing and submitting the proposal.</td>
</tr>
<tr>
<td>Editor</td>
<td>Department administrators who can edit the funding proposal.</td>
</tr>
<tr>
<td>Workspace</td>
<td>The term for the funding proposal screen with basic demographic information about the proposal, including the proposal’s state (AKA status), workflow bubbles, the attachments tab, and Financials tab. If this proposal is being submitted via s2s, there is a link to navigate to the SF424 workspace. Here, the term “workspace” has nothing to do with the Grants.gov workspace.</td>
</tr>
<tr>
<td>Activity</td>
<td>A link in the left navigation bar that allows you to take an action for a proposal.</td>
</tr>
<tr>
<td>PI Assurances</td>
<td>Previously known as the PI certification, the assurances are statements that must be signed by all PIs, co-PIs, co-investigators, senior/key personnel, and, for fellowships, by the mentor (faculty member) and mentee (fellow) for each proposal.</td>
</tr>
<tr>
<td>Certify</td>
<td>Certify is an activity available only to the lead PI or fellow (specifically the person listed on the General Proposal Information SmartForm Q4) and is the electronic method for the lead PI or fellow to complete their assurances. All senior/key personnel who are not the lead PI or fellow must complete their assurances via the Assurance Ancillary Review process.</td>
</tr>
<tr>
<td>Ancillary Review (AR)</td>
<td>A method of submitting a review request outside of the departmental review routing and workflow process. This is a manual process, not an automated one, and can be kicked off by the departmental administrator for many reasons including F&amp;A waivers, cost share approval, and assurances. Assurances for all Senior/Key Personnel are completed via AR except for the lead PI or fellow, who completes assurances using the Certify activity.</td>
</tr>
</tbody>
</table>
### Dashboard
The home screen when you log onto Princeton ERA using the link on the Princeton ERA home page. This screen contains “My Inbox” and “My Reviews” tabs, and a “Recently Viewed Items” bar.

### My Inbox
- A tab on the Dashboard with a list of your “to-do” items.
- In this tab, lead PIs will see all of their proposals that are in editable states, as well as proposals that are waiting for the Certify activity to be completed by them, regardless of proposal state.
- Senior/Key Personnel will only see proposals waiting for an Ancillary Review to be completed by them, regardless of proposal state.

### My Reviews
A tab on the Dashboard with all proposals requiring you to respond to an ancillary review.

### SmartForm
- An online form that is completed for each proposal and budget, generally by the proposal developer. Lead PIs will complete the Compliance Review SmartForm directly in the system. If the proposal is being submitted with senior/key personnel such as co-PIs, co-Investigators, or fellows, the grants manager of the submitting department will collect answers to these questions from all participants and will have completed this page. The Lead PI can review the Compliance Review page answers in the system and work with the submitting department’s grants manager to resolve any questions.
- The SmartForm contains a series of questions with demographic and budgetary information for the submission. They are called “smart” forms because they hide/show different questions based on how prior questions are answered.

## 2 Department Review

Department Review occurs once a department administrator submits their developed proposal. All proposals must be approved by the submitting department before routing to ORPA for GCA (or Specialist) review.
2.1 Notification and Accessing the Proposal Waiting for Review

- Department Reviewers will receive an automatic system generated email from erasupport@princeton.edu in their Princeton email client (such as Outlook) alerting them that there is a funding proposal ready for Department Review.
- The subject is “Proposal Submitted” and the body of the email indicates it has been submitted for your review. This specifically means the proposal has been submitted for your department review and approval; it does not indicate the proposal has been submitted to the sponsor.
- The submitting department reviewers are listed in the “To” field of the email. Only one of the submitting departmental approvers needs to review and approve on behalf of the department.
- The email includes a link that will open the proposal in a tab in your default browser window. If you have not already logged on to University systems in that browser, you will have to log on and accept the DUO request on your device (phone or computer). Then the proposal will display in a tab in your default browser.

Additionally, the funding proposal will appear on department reviewers’ Dashboard. It will be in the “My Inbox” tab, signaling that it requires an action, and the “My Reviews” tab, which is a list of all proposals requiring your review.
The reviewer will select the funding proposal and review this proposal from its workspace. From the workspace, reviewers should use the proposal checklist on the Princeton ERA website as a guide to confirm the funding proposal is complete, accurate, and that all required activities have been completed.

2.2 Review the Funding Proposal SmartForms

Approvers will review the funding proposal SmartForm. Note that reviewers cannot edit the SmartForm pages, but only have a read-only view.

To assist with the review, Department Approvers can check off each section as they review it. This turns the section green and is a helpful tool for tracking progress of the review.
If the reviewer has questions or comments on the funding proposal SmartForm pages, they may add Reviewer Notes.

To add a Reviewer Note, select the conversation bubble next to a question and a pop-up bubble will appear. The type will automatically be Department Draft Change Request.

- Add your comment.
- Select if a response from the proposal creator is required or not. You should ONLY check response is required when you will be sending the proposal back to the Dept Admin for changes and require that they change or specify a question before proceeding. *If “Response Required” is selected, the proposal developer will not be able to submit the proposal back for department review until they have responded directly to this note.*
- Click OK.

Once added, the comment will appear below. Proposal editors can respond to comments when the proposal is sent back for changes.
Checking off sections as they are reviewed and adding Reviewer Notes are not required steps of the review process but are a helpful way to track progress and communicate with the proposal creator.

*Note: The Reviewer Notes functionality is only available on the Funding Proposal SmartForm pages and is not on the budget pages or activities. If you have changes or comments regarding the budget or activities, you will add them when executing the Request Changes activity.*

### 2.3 Review the Budget

#### 2.3.1 Financials tab

While you can see a list of all budgets on the Budgets tab, the Financials tab on the funding proposals workspace contains a summary of all consolidated budgets that are being submitted to the sponsor (where “In Financials = yes”) is on the Financials tab. For example, if there are multiple budgets due to on and off campus rates, or there are two faculty members on this proposal and each faculty member wants to see their budget separately, the financials tab sums those budgets together. Note that this tab does not include cost sharing.
<table>
<thead>
<tr>
<th></th>
<th>Period 1</th>
<th>Period 2</th>
<th>Period 3</th>
<th>Cumulative</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current All-Period Totals</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Personnel:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries</td>
<td>$88,893</td>
<td>$92,448</td>
<td>$96,145</td>
<td>$277,486</td>
</tr>
<tr>
<td>Benefits</td>
<td>$65,555</td>
<td>$68,177</td>
<td>$70,904</td>
<td>$204,636</td>
</tr>
<tr>
<td><strong>General:</strong></td>
<td>$23,338</td>
<td>$24,271</td>
<td>$25,241</td>
<td>$72,850</td>
</tr>
<tr>
<td>Assistantship Ai/AR Tuition</td>
<td>$330,000</td>
<td>$289,800</td>
<td>$299,584</td>
<td>$919,184</td>
</tr>
<tr>
<td>Equipment</td>
<td>$90,000</td>
<td>$40,000</td>
<td>$40,000</td>
<td>$170,000</td>
</tr>
<tr>
<td>Materials and Supplies</td>
<td>$70,000</td>
<td>$72,800</td>
<td>$75,712</td>
<td>$216,512</td>
</tr>
<tr>
<td>Travel: Domestic</td>
<td>$50,000</td>
<td>$52,000</td>
<td>$54,080</td>
<td>$156,080</td>
</tr>
<tr>
<td>Travel: Foreign</td>
<td>$70,000</td>
<td>$72,800</td>
<td>$75,712</td>
<td>$218,512</td>
</tr>
<tr>
<td><strong>Subaward(s):</strong></td>
<td>$85,000</td>
<td>$85,000</td>
<td>$85,000</td>
<td>$255,000</td>
</tr>
<tr>
<td>Total Direct less Subaward F&amp;A:</td>
<td>$493,893</td>
<td>$457,048</td>
<td>$470,729</td>
<td>$1,421,670</td>
</tr>
<tr>
<td>Total Direct:</td>
<td>$503,893</td>
<td>$467,048</td>
<td>$480,729</td>
<td>$1,451,670</td>
</tr>
<tr>
<td>Total F&amp;A:</td>
<td>$188,414</td>
<td>$179,930</td>
<td>$187,022</td>
<td>$565,266</td>
</tr>
<tr>
<td>Project Total:</td>
<td>$692,307</td>
<td>$646,878</td>
<td>$667,751</td>
<td>$2,006,936</td>
</tr>
</tbody>
</table>

2.3.2 View cost share commitments

To see if this proposal contains cost sharing, click on the “Create-Update Cost Share Commitment” activity in the left navigation bar.

The “Create-Update Cost Share Commitment” window appears.

If there is no cost share, this screen will be blank. If there is cost share, the cost share commitment will display on this screen. Review the window and click on OK.

Cost share information can also be viewed in the Information Warehouse. Go to the “ORPA Princeton ERA Reports” folder, then the “Campus Reports” subfolder. Running the “Cost Share Report” will allow you to view cost share commitments for a proposal.
2.3.3 Generate Budget PDF activity

Generate a PDF of the budget to see a full picture of all budgets on the proposal, including cost share budgets. A budget summary and each individual budget will be included.

Click on the Generate Budget PDF activity in the left navigation bar.

The “Generate Budget PDF” pop up window appears.

Click on OK.
Then click on the History tab and click on the PDF to view it the PDF in a separate tab in your browser window.

The PDF displays the following, each on its own separate page:
- The sum of all individual budgets where “include in financials = yes” (such as summing On and Off campus budgets, or summing the budget for Professor Ramsey with the budget for Professor Smith)
- The sum of all cost sharing budgets
- Then each individual budget with its associated cost sharing budget (if any) is displayed

### 2.4 Review attachments tab

Click on the Attachments tab to see links to all attachments uploaded to the FP SmartForms pages and to the activities. Click on a link to view the attachment in a tab in your browser window. This tab also shows who uploaded the attachment and the date and time it was uploaded.

If this proposal was submitted via S2S, there might not be a lot of attachments uploaded here. Refer to the next section.

### 2.5 Review the SF424

#### 2.5.1 Proposal submitted via S2S

Proposals that will be submitted to federal sponsors via S2S (system-to-system functionality, directly from the Princeton ERA system to the federal sponsor) will have a SF424 link on the funding proposal workspace.

Click on the SF424 link.
You are now on the SF424 workspace, which is marked as “SF424” in the upper right corner.

Click on the View link to view the PDF of the SF424 submission in a tab in your browser window.

To navigate back to the funding proposal workspace, click on the FP link.
2.6 How to Request Changes

If a proposal needs to be updated or changes are required, select the Request Changes activity on the funding proposal workspace. This activity can be used to send the proposal back to the proposal developer for updates.

In the pop-up window, you will see a summary of any unresolved reviewer notes that you have added. You can also add additional comments to the Department Administrator that will appear in the History Tab.
Click OK.

- The proposal is now in Department Review: Response Pending from PI State
- The Clarification Requested workflow bubble is highlighted.
- The system sends automated email from erasupport@princeton.edu to the Admin Contact to let them know changes have been requested. Any comments added to the Request Changes window do not appear in the email to the Admin Contact, but will appear on the History tab.
- The proposal is in the "My Inbox" tab on the Dashboard for all the Admin Contact and all editors listed in the funding proposal.
The department editors can now edit the funding proposal, respond to reviewer notes, and submit changes back to the department reviewer.

2.7 Receiving response after changes requested

- After the admin contact or proposal editor has reviewed the comments and made proposal updates, they will press the “Submit for Department Review” activity to route the proposal back for department review.
- All department reviewers receive a notification email in their Princeton email from erasupport@princeton.edu with the subject “Changes Submitted Back to Department Review”

Click on the link in the email or find the proposal in the “My Reviews” tab of your Dashboard. There are two places to check for Comments:
• Click on the History tab to see if the admin contact or editor left any comments during the “Submit Changes to Department Reviewer” activity.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Author</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>➤ Submit Changes To Department Reviewer</td>
<td>Weber, Stacey A</td>
<td>8/6/2020 7:30 PM</td>
</tr>
<tr>
<td>replied to reviewer notes and updated budget, thanks!</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➤ Changes Requested By Department</td>
<td>Bristol, Todd M</td>
<td>8/6/2020 7:28 PM</td>
</tr>
</tbody>
</table>

• Also click on the Reviewer Notes tab. If you are on a laptop, you may need to click on the ellipsis (three dots) tab and then click on Reviewer Notes.

To see all reviewer notes previously left by the dept reviewer and click on “show reply” to see the reply to each note.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Author</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maureen Thompson-Siegel created Specialist Change Request on July 29, 2020 for Compliance Review Question: Will any equipment, materials, or supplies be exported (including by hand-carrying) to another country by Princeton University in the course of this project? If yes, please include the manufacturer name &amp; model number. (This includes Fabricated Equipment.) Are you sure this is the right answer? Show 1 Reply</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maureen Thompson-Siegel created Specialist Change Request on July 29, 2020 for Budget Periods and Key Dates Question: Application submission deadline: Is this the correct deadline date? Show 1 Reply</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The reply appears:

Maureen Thompson-Siegel created Specialist Change Request on July 29, 2020 for Compliance Review Question: Will any equipment, materials, or supplies be exported (including by hand-carrying) to another country by Princeton University in the course of this project? If yes, please include the manufacturer name & model number. (This includes Fabricated Equipment.)

Are you sure this is the right answer?

Hide Replies

Stacey Weber

I updated this question to yes and added details, thanks! posted 8 days ago

Click on the blue link to go directly to the question on the Funding Proposal workspace.

2.8 How to Approve Proposal

Once a proposal has been reviewed and is considered complete, it can be Approved. Approving the proposal will advance it on to Specialist Review state, meaning the ORPA GCA will review it.

From the funding proposal workspace, the reviewer can select the Approve activity.

The Approve pop-up will appear. If any Ancillary Reviews are outstanding, you will receive a warning message and can continue with approval, but please note that all PI Assurance Ancillary Reviews must be complete before ORPA review.

Comments are not required but will appear on the History tab if added.

Click OK.
The proposal has been approved by the Department Reviewer.
2.9 What happens after the Proposal is approved by a department reviewer?

- Once the proposal has been approved by one of the department reviewers, it no longer appears in the “My Inbox” or “My Reviews” tab of the Dashboard of any reviewer. If you want to view the proposal later, it can be located on the Grants tab.
- The proposal is now in the Specialist Review state, which means the ORPA GCA will begin reviewing the proposal. The Specialist Review workflow bubble is highlighted.
- During their proposal review, ORPA GCAs may need to request changes or updates to the funding proposal. Sometimes the ORPA GCA may require updates go through department review again, and other times the ORPA GCA will not require the department reviewers to review it again. In the former case, after the admin contact or editor updates the proposal and submits for Department Review, an email will be automatically be sent to all department reviewers, with the subject line “Proposal Submitted”, indicating the proposals requires your review and approval. The proposal will appear in the “My Inbox” tab of all department reviewers.
- After the ORPA GCA approves the proposal, it will be in “Pending Submission to Sponsor” state. This means the GCA is preparing to submit the proposal to the sponsor. Once the proposal has been submitted it will move to the “Pending Sponsor Review” state.

3 Locating proposals after department approval

- Once the proposal has been approved by one of the department reviewers, it no longer appears in the “My Inbox” or “My Reviews” tab of the Dashboard of the department reviewers. If you want to view the proposal later, it can be located on the Grants tab.

Click on the Filter to search by many different fields. Note that “Name” here refers to “Proposal Short Title” not to a person’s name.
Note that in Princeton ERA, the % sign is the wild card. Enter the search criteria in the search box, then click on the magnifying glass to find the proposals that match the search criteria.

Click on the name in the search results list to open the funding proposal workspace to view the proposal’s funding proposal workspace.
Also note that the Proposals tab is all proposals that you have access to. Each subsequent tab is a subset of the proposals in the “Proposals” tab; e.g. the “Internal Review” tab lists all proposals that are in Department Review, Specialist Review, or Pending Submission to Sponsor states.

Ancillary Review (AR) for Department Reviewers

As a department reviewer, you might also receive a request for an ancillary review (AR). What is the difference between a department review and an ancillary review? What is an ancillary review?
4.1 Differences between Department Review and Ancillary Review

<table>
<thead>
<tr>
<th>Department Review</th>
<th>Ancillary Review (AR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Automatic notification that is kicked off when the proposal editor submits a proposal in your dept. The department reviewers are a predefined list.</td>
<td>• Manual notification kicked off when a proposal editor adds you to an ancillary review. The review may be sent to you as an individual, or to a group.</td>
</tr>
<tr>
<td>• You receive an email from <a href="mailto:erasupport@princeton.edu">erasupport@princeton.edu</a> with the subject line: “Proposal Submitted”, which means the proposal is waiting for your review and approval.</td>
<td>• The proposal may be submitted through your department, or a different dept.</td>
</tr>
<tr>
<td>• FP SmartForms have the “reviewer notes” functionality previously discussed.</td>
<td>• You receive an email from <a href="mailto:erasupport@princeton.edu">erasupport@princeton.edu</a> with the subject line “Ancillary Review Notification” which means this proposal requires an ancillary review from you. The email contains comments from the proposal editor letting you know why an ancillary review is requested from you.</td>
</tr>
<tr>
<td>• Proposal must be approved by one of the submitting dept’s reviewers before moving on to the Specialist Review state, meaning an ORPA GCA will review and approve.</td>
<td>• The AR might be required, or not required, as indicated in the email. Not required reviews are more of an FYI.</td>
</tr>
<tr>
<td>• After dept approval, the dept reviewer can still view the proposal on the Grants tab.</td>
<td>• FP SmartForms do not have the “reviewer notes” functionality.</td>
</tr>
<tr>
<td>• There is no Department Review in the Agreements module.</td>
<td>• The ancillary review will not stop a proposal from moving from Department Review to Specialist Review, unlike the department approval which is necessary for ORPA to review. However, all required ancillary reviews must be completed before an award is setup.</td>
</tr>
</tbody>
</table>

4.2 Why Ancillary Reviews are sent
Ancillary reviews are sent for many reasons, such as:
- PI Assurances
- Cost share commitment approvals
- Lab/space change
- F&A waiver requests
- Compliance concerns
- Congruency review at the award stage
- Ad hoc

4.3 How will you know you have an Ancillary Review to review?
You’ll receive an email from erasupport@princeton.edu. If the review is for a proposal, the subject line will say “Ancillary Review Notification.” If the review is for an agreement, the subject line will say “Assigned for Ancillary Review.”
The “Review Type” is listed; in the example below the type is “Ad Hoc Review”. The proposal editor’s comments as to why the review is being requested are included.

Required will either be yes or no. Required means you must respond while no means, this AR is more of an FYI.

Note: It is very important to respond to required ancillary review since ORPA cannot setup an award with outstanding required reviews!

### FP00002234: Ancillary Review Notification

**To:** Todd Bristol  
**Link:** [FP00002234](#)  
**PI:** Jacob Shapiro  
**Title:** New Proposal Example

A Funding Proposal has been assigned to you for ancillary review. Click the link above to access and review the submission.

<table>
<thead>
<tr>
<th>Review Type</th>
<th>Comments For Ancillary Reviewer</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Review</td>
<td>Hi Todd, Can you please review for (ABC) reason? Thanks, Stacey</td>
<td>yes</td>
</tr>
</tbody>
</table>

#### 4.4 Access the proposal

**4.4.1 Access the proposal through email**

Click on the link in the email to log on to the system. The Funding Proposal workspace appears.

Note that the AR request can be sent to an individual or to a group of people. Only one person in the group needs to approve. Unlike department approval emails, you will not be able to tell from the ancillary review email if the request was sent to a group or not. If you click on the email link and you get a message that you do not have rights to view the proposal, it means someone else in the group already completed the ancillary review for the proposal.

**4.4.2 Access the proposal through the dashboard**

Alternatively, click on the login link on the Princeton ERA home page. After logging on, the Dashboard is displayed and the proposal will be in the “My Inbox” and “My Reviews” tabs. As noted above, if this
ancillary review was sent to a group, and one other person in the group already approved it, the proposal will not be on your “My Inbox” nor your “My Reviews” tabs.

4.5 Reviewing proposal for Ancillary Review
Review the proposal for the reason specified in the email. Check the proposal “History tab” to see any comments or documents added to the review by the review requestor. These comments will typically be the same as what was added in the email.

Review the proposal; Refer to previous chapters in this manual for information on how to access items such as:

- The FP SmartForms for personnel, dates, and compliance information
- Reviewing the financials + budgets tabs, cost share commitments, and how to print the budget PDF
- Viewing attachments via the Attachments tab
- If the proposal is being submitted via s2s, how to access the SF424

4.6 Send Email
If you have questions for the proposal editor, use the Send Email functionality to email them through the system to let them know about your concerns. Click on the send email activity in the left navigation bar.
Fill out the “Send Email” popup window. Enter a subject line. You can send email to a group of people, such as all proposal editors, or a specific person. Typically, we will send an email to a specific person. Type their name in the “Select any other recipients” box to add them. Type your comment in the Comments box. Comments entered here will appear in the email message and on the History tab. You can also upload attachments via the drag and drop functionality. Click Ok to send the email.
The comments in the send email activity will appear on the History tab, and attachments will appear on the Attachments tab.
4.7 Submit Ancillary Review

When you are ready to approve the AR, click on the submit AR activity in the left navigation bar.

Select 2 and 3 as completed and accepted, enter comments and upload supporting attachments with the drag and drop functionality, and click ok.

The ancillary review is now submitted.
4.8 What happens after submitting the Ancillary Review
The ancillary review is complete. The proposal will no longer appear in your “My Inbox” and “My Reviews” tabs on the Dashboard. If your department is the proposal submitting department or the proposal editor has added you as an editor or viewer for that proposal, you will still be able to locate this proposal on the Grants tab. If you do not have additional security access to this proposal, you will no longer be able to access it. However, Information Warehouse reports in the “ORPA Princeton ERA Reports” folder can be used to refer to the basic demographic data about the proposal.