Grants Manage Ancillary Review Quick Guide

Click on Manage Ancillary Reviews in the left navigation bar then:

1. Identify each organization or person to display.
   - Press Add.

2. Select an Organization or specify a person. See the chart for guidance.
   - Select an Organization or specify a person. See the chart for guidance.

3. Review type
   - Select a review type

4. Response required?
   - Yes

5. Comments
   - Include the review type and comments for the ancillary reviewer here. These comments appear on the History tab.
   - Unless this Ancillary Review is an FY, select Yes.

6. Supporting documents
   - Drag + drop any attachments for the reviewer here. These attachments appear on the History tab and the Attachments tab.
   - Do not upload attachments here. These attachments are not included in the email to the reviewer and do not appear in the History or Attachments tabs.

7. Click OK.

8. Include the review type and comments for the ancillary reviewer here. These comments appear on the History tab.

9. Select an Organization or specify a person. See the chart for guidance.

10. Click OK. This triggers the email to be sent.

After clicking OK in #10, an email is sent from erasupport@princeton.edu (not from your email address) to the person specified in #1, or the people associated with the “organization” in #1.

Only the comments in #5 are included in the email. No attachments are included in the email. By including the comments in #8 and attachments in #9, it makes it easy for the ancillary reviewer to see, directly in Princeton ERA, why they are reviewing the proposal and any attachments they need to review, because those comments and attachments are included on the History tab. The attachments in #9 are included on both the History and Attachments tabs.

Who to select in Step #2?

<table>
<thead>
<tr>
<th>Organization (exactly as below)</th>
<th>Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compliance</td>
<td>RIA-IRB RIA-IACUC RIA-IBC RIA-FCOI</td>
</tr>
<tr>
<td>Assurances</td>
<td>Name of PI; if multiple people need to complete the Assurance, click “OK and Add Another” in Step 7.</td>
</tr>
<tr>
<td>Export Controls</td>
<td>ORPA-Export Controls</td>
</tr>
<tr>
<td>Cost Share</td>
<td>Manager of Department committing cost share, SEA-Sch of Eng &amp; Appl Sci, PRV-Ofc of the Provost, or DFR-Ofc Dean for Research</td>
</tr>
<tr>
<td>Lab or Facility Space Change</td>
<td>SEA-Sch of Eng &amp; Appl Sci -or- PRV-Ofc of the Provost</td>
</tr>
<tr>
<td>Indirect Cost Waiver</td>
<td>ORPA Director (only when the reduced rate is not published)</td>
</tr>
<tr>
<td>PI Eligibility (select Ad Hoc)</td>
<td>DFR-Ofc Dean for Research</td>
</tr>
<tr>
<td>BSL-3</td>
<td>PRV-Ofc of the Provost</td>
</tr>
<tr>
<td>University Research Board</td>
<td>ORPA-URB</td>
</tr>
</tbody>
</table>

How do you know when the ancillary reviewer has completed their Grants ancillary review?

You won’t receive email when an ancillary review AR is complete, but all ancillary reviews are listed at the bottom of the Reviewers tab.

Are ancillary reviewers automatically reminded to complete their Grants ancillary review?

The system does not send reminders, but you can use the “Send Email” activity to send an email to remind the reviewer. The reviewer will receive the email in their Princeton email client (e.g. Outlook) and the content of the email is recorded on the History tab.
Agreements Manage Ancillary Review Quick Guide

Click on Manage Ancillary Reviews in the left navigation bar then:

Who to select in Step #2?

<table>
<thead>
<tr>
<th>Organization (exactly as below)</th>
<th>Person</th>
</tr>
</thead>
</table>
| Compliance | RIA-IRB  
RIA-IACUC  
RIA-IBC  
RIA-FCOI | Assurances  
Only needs to be completed if this is a non-funded agreement, or is a funded agreement + the answers to the compliance questions have changed. |
| Export Controls | ORPA-Export Controls |
| University Research Board | ORPA-URB |
| PI Eligibility (select Ad Hoc) | DFR-Ofc Dean for Research |
| OIT Security | OIT-Information Security Ofc |

How do you know when the ancillary reviewer has completed their Agreements ancillary review?
The Admin Contact and the Agreement Owner receive email when an ancillary review is complete. All ancillary reviews + their “Accepted” status are listed in the Ancillary Reviews section of the Agreements workspace.

Are ancillary reviewers automatically reminded to complete their Agreements ancillary review?
The system does not send reminders, but you can use the “Notify Ancillary Reviewers” activity to send an email to remind the reviewer. The reviewer will receive the email in their Princeton email client (e.g. Outlook) and the notification is recorded on the History tab (although the “Notify AR” comments are not directly recorded there).

Need help? Email erasupport@princeton.edu

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