SOP: Award Review
**Step 1: Open the PT (Proposal Tracking) Record Associated with the Award**

It is assumed that the Reviewer has received an Action Item.

1-1 Open the Action Items list (Click on the “Open” link from “My Action Items” section in the Right menu)

1-2 From the List Find the Correct Action Item

1-3 Open the Action Item by Clicking on the Folder Icon Next to its Name
In the Opened Action Item Window Click on the Award Link

Click Here to Open the AT record of this Award
### 1-5 The Award Review will be done in PT. This can be opened from the AT Opened record:

1) From the AT record window, click on the “Related Proposals” Folder.
2) From the List of Proposal that displays Click on the Folder Icon in the “Open” column.

**Note:** Although this interface gives us the ability to have more than one related proposals on this list, This is something that should never happens because we will not be relating our award increments to more than one proposal. So the user should let the Module Admin know if more than one related proposal is listed on this page.

### STEP 2: REVIEW ATTACHED DOCUMENTS.

#### 2-1 Navigate to Attachments Folder

1) On leftside menu, click on the “Attachments” folder (1) at the bottom of the menu.
2) Click on appropriate subfolder, if desired (most likely “Award”) (2)

**Note:** there are attachment folders associated with each proposal, select the bottom folder beneath awards to see all attachments.
2-2 Open Attachment

<table>
<thead>
<tr>
<th>Name</th>
<th>Category</th>
<th>View Latest</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>CloseOut_Test</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Closeout_Testing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test eForm for Close Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test Name</td>
<td>Budget</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1) Click on the icon of the desired attachment.
2) Attachment will open in new window.

**STEP 3: ADD TERMS AND CONDITIONS.**

3-1 From the opened PT record open the Terms and Conditions Folder

1) Open the “Awards” folder (1),
2) then Open the “Terms and Conditions” folder(2).
From the Terms and Conditions page, click add

Select the appropriate terms.

1) Select the appropriate terms by checking the box next to the term (1).
2) In accordance with the business process documentation, if a term needs to be added, type a name and description (2).
3) Click on the “Save” button (3).

Note more than one term can be selected at one time.

Edit the description, (if necessary)

1) Click edit next to the term whose description needs to be edited.
2) Screen opens to new screen to edit (not shown)
3) Make changes and click save.
**STEP 4: REVIEW APPROVALS**

4-1 Navigate to the Approvals Folder

1. Navigate to the Approvals Folder
2. Select the Approvals Folder for proposal record
3. Review the status of existing approvals

Note: Approvals are associated with Proposal, need to review all proposals

4-2 Review and Open the Approvals

1. If Approval needs to be updated, based on data on screen (for example (1), (2)), click on the Open Icon (3)

4-3 Update the Approval’s Information

1. Update approval information such as (1) Status, (2) Reference No, (3) Review Type (for Human Subjects), and (4) Dates
2. Click Save, and Navigate back to Approvals Folder to make other updates

Note: Approval should not be pending after review, unless there is valid business reason.
4-4 Add Approval

1) On the Approvals Screen (click Approvals Folder in left menu), to add a new record click on the “Add Approval” button (1)
2) Screen for new approval opens (see 3-5 for screenshot)

4-5 Select Approval Type (Everything but Human Subjects)

1) Select Approval Type (1)
2) Click on the “Continue” button (2)

4-6 Add the Approval Information

1) Add approval information such as (1) Status, (2) Reference No, (3) Review Type (for Human Subjects), and (4) Dates
2) Click Save, and Navigate back to Approvals Folder (see 3-1 for screenshot), to add another approval.
4-7 Add Approval (Human Subjects Only)

1) Select Approval Type (1)
2) Click radio button “Attached” (2) under protocol
3) Click on the “Continue” button (3)

4-8 Search for IRB protocol

1) Search by IRB Protocol Number (1)
2) Search by other criteria (2)

4-9 Attach the Protocol
STEP 5: ADD AWARD INCREMENT STATUS

5-1  Navigate to Awards Folder

1) Using the lefthand menu, click on the “Awards” folder (1)

5-2  Select the Award Increment Status

1) On the right side of the screen, under the “Award Information” table (1), click on the appropriate Award Increment Status (2), looks like a blue hyperlink.
2) A status history window will open (see 5-3)

Note: the status displayed on this screen is the most recent added.
### 5-3 Add an Award Increment Status

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the appropriate status from the “Status” dropdown list (1), in accordance with the business process documentation</td>
</tr>
<tr>
<td>2</td>
<td>Click the “Add” button (2)</td>
</tr>
<tr>
<td>3</td>
<td>Click the “Close” button (3)</td>
</tr>
</tbody>
</table>

#### Step 6: Add Attachments

#### Step 7: Relate the Proposal (Step 7 is only needed if the award is related to another agreement e.g. a Master Agreement). Need Proposal number to complete.
7-1 Navigate to Related Proposals

1) Using the lefthand menu, click on the “Related Proposals” folder (1).

7-2 Add a Related Proposal

1) The Related Proposals/Contracts/Agreements screen opens, and you can see all of the current related proposals.
2) On the right side of the screen is an add button (1). Click to add a related proposal. A new window opens. (7-3 below).

7-3 Locate the related proposal

1) Input the proposal number in the Select by Number field (1), and click on “Go” (2).
7-4

Select Related Proposal

1) Scroll down to the bottom of the screen to select the proposal identified above in 7-3 (1).
2) Click on the checkbox next to the proposal (2).
3) Click on the “Select” button (3).
4) The screen will close and the selected proposal has been added to the list of related proposals in 7-2 above.

STEP 8: COMPLETE THE ACTION ITEM

8-1

Select My Action Items

1) On the InfoEd home screen, on the right side of the screen, select my ‘My Action Items’ (1), and a sub menu will open.
2) Click on the link ‘Open’, to view open actions items (2).

8-2 Select the Appropriate Action Item:

1) Move the cursor over the yellow folder until it turns into a hand, and the Open dialog box opens (1).
2) Click on folder, and task/assignment screen opens in new window (see 10-3).

8-3 Select Next Step
1) In Task Assignment Screen, Select the ‘next step/ decision’ from dropdown list (1).
2) Select ‘Assign to’ from dropdown list (2).
3) Click on ‘I am done working with this Assignment’ button (3).