

Review and approve a proposal

1. When a person is designated as an approver for a particular proposal, they must either approve or disapprove the proposal. Designated reviewers receive a copy of the proposal for informational purposes only – no action is required.

2. When a proposal is routed for approval or review, the recipient receives both an internal PennERA message and a Penn email message. To continue with Penn email, go to Step #4. Otherwise, to get to your internal messages in PennERA, log on and go to Personal – Messages and click your name.



3. The inbox will appear with messages for proposals needing to be reviewed or approved. Click the envelope icon under the "Open" column.

Received	Open	Subject	From
Mon 02-Jul-2007 12:07:11 PM		Approval Needed - 10011554	BENOFF, STUART
Wed 20-Jun-2007 4:15:49 PM		Proposal review available - 10012676	BENOFF, STUART

4. Both the reviewer and approver will receive a link to the proposal. An approver will also receive a link to direct them to the Reviewer Dashboard where they can approve/not approve.

From FRATANTARO, STEPHEN
To MR. BENOFF, STUART L ^9142 - Administrative Information Technology and Data Admin
Received 02-Jul-2007
Subject Approval Needed - 10011554
 Proposal 10012267 submitted by STEPHEN FRATANTARO from 8760 - Research Services requires your approval. Your prompt attention to this request is appreciated. If you have any concerns about the proposal, please contact your departmental administrator.
 To review, approve or disapprove this proposal click: [Reviewer Dashboard](#)

Attachments 10012267

For Review Proposal

5. Click the link to the "Reviewer Dashboard". There, the proposal will be able to be approved or disapproved, comments can be added or the routing status of the proposal can be tracked.



6. Click the **Item(s) to Review** tab. This will expand the section to view the information that requires action.

Done	Show	Items
<input type="checkbox"/>		Proposal
<input type="checkbox"/>		Certification by Principal Investigator
<input type="checkbox"/>		Proposal Transmittal Form

7. Click the yellow "open folder" icons to view the proposal and its related items. Check all of the associated checkboxes under the "Done" column. Click the flashing "save disk" icon located on the top left of the reviewer dashboard.



8. To add comments, click the **Add Comments** tab which will expand the section.

Add Comments

To be shared with everyone

Between you and the PI

Between Reviewers Only

Between you and Admins

Type comments in the appropriate box and click the flashing "save disk" icon to save.

9. Approvers can see who viewed the proposal, their decision and who is next in the routing path. The approver can opt to insert additional reviewers and/or approvers into the routing path. To do this, click the "Insert" link on the **Routing Progress** tab. This will bring up a routing progress screen.

Step Number	Step Name	Who	Notified	Completed	Decision	Insert
Step 1	Business Office	MR. STUART L BENOFF	02-Jul-2007 11:21:01 AM	02-Jul-2007 12:07:11 PM	Approved	
Step 2	School Office	STEPHEN FRATANTARO				
Step 3	Research Services	Mr. Todd S Swaveley				

Click the icon to insert the approver/reviewer into the route and select the person.

10. To enter your decision, click the **My Decision** tab which will expand the section. Select the appropriate response, "Approved" or "Not approved", from the drop down menu and click the flashing "save disk" icon to save. Once the decision has been selected, the approver will be prompted to electronically sign the document by entering their PennKey and PennKey password. The proposal can not progress to the next step in the routing path until the requirements of the current step are met.

11. Upon approval, the proposal routes to the next defined step in the path. If the proposal is disapproved, the submission is returned to a predefined step for possible correction and resubmission.

Approval paths are predetermined by the school/center's administration. Predefined approvers/reviewers can not be removed from the routing path. For help, please contact pennerahelp@pobox.upenn.edu.