How to Approve a Proposal

OPTION #1: Access Proposal through SmartGrant Login Screen

To access SmartGrant open the web browser and navigate into the PROD account.

Click Continue

Enter the User Login Information
- Enter Login ID
- Enter Password

Click Submit
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After successful login to SmartGrant, users that are approvers with proposals requiring review at their level will have an active “Routing Approvals” option under the To Do List.

Click **Routing Approvals—View Detail**

A complete list of proposals waiting for approval by the user will display. List includes GPID#, Due Date, and Approval Level (if user has multiple approval roles at the organization). Data can be sorted by active column headers. To open proposal for required review and approval, click **GPID#**.
Proposal will open. Select **Submittal Processes → Online Routing** to access the routing and approval page.

The proposal approval page will show the approver's level as pending—with a “clock” icon next to it. The proposal approval page will automatically open with the “Accept Proposal” option highlighted. A “Hold Proposal” option is grayed out but can be selected if approver is not yet ready to enter their approval. Selecting to “hold a proposal” will keep the proposal at current approver's level and resend a routing email notification link to the level.
If you are the PI approving the proposal, you will see a statement of proposal acceptance terms and conditions on the routing screen. Only the PI level will have the statement display on the proposal approval page.

At the top of the proposal approval page, options to view proposal information will be available to all approvers.

Click on **Attachments** to view the Budget worksheets (if generated), any proposal related document (if uploaded), and proposal forms (if a non-FastGrant proposal).

Click on **Proposal Info** to view a summary page of proposal information.

Click on **FastGrant** (if a FastGrant proposal) to view Grants.gov forms included with the submission.

Click on **CommLog** to enter any notes or communications about the proposal.

Click on **Cancel Routing** to clear any previous approvals and start over again with the routing process.

Click on **Modify Level** if changes need to be made to the routing list. Changes can only be made to levels AFTER the current approval level.
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When an approver is ready to approve, optional comments can be entered that will be retained on the proposal routing page as well as included in the routing email sent to the next level in the approval sign-off.

Click **Update** to enter and save the approval.
After updating, the proposal routing page refreshes to reflect a “Pending” status—indicating there are still other approvers that must review and approve. For the approver, their level now shows a “check” icon as confirmation that approval task is complete.

To exit out of the proposal routing page, click **Back to main menu** located in the menu bar at top of page.
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To exit out of the proposal, click **Back To Do List** located in the menu bar at the top of the page. Click Save or OK to any messages.

If approvals are required on other proposal, click the **Routing Approvals—View Detail**. Otherwise, if ready to shut down the SmartGrant session, click **Exit** at the bottom of the page.
**How to Approve a Proposal**

**OPTION #2: Access Proposal through Routing Email**

If you are the next approver required to review and approve a proposal in routing, then you will receive a routing email notification with a subject header of “SmartGrant Notification”.

**To access the SmartGrant Proposal**—Click on the hyperlink embedded in the routing email notification.

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SmartGrant Routing Memorandum 1/22/2019 1:40:01 PM

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You have been requested to review this proposal. Use the hyperlink from this email to go directly to the review and approval page, or login to SmartGrant and check your To-Do List:

https://dev7.erasoftwareapplications.com/Routing8/Login.aspx?ID=a012b69726734fa5a9a510d8a7f70751b

Reviewer Comments:

Approval okay with supporting documentation as provided by synopsis/TEACH-Ch-SR.
How to Approve a Proposal

Enter the User Login Information

- Enter **Login ID**
- Enter **Password**

Click **Sign In**
If you are the PI approving the proposal, you will see a statement of proposal acceptance terms and conditions on the routing screen. Only the PI level will have the statement display on the proposal approval page.

At the top of the proposal approval page, options to view proposal information will be available to all approvers.

Click on **Attachments** to view the Budget worksheets (if generated), any proposal related document (if uploaded), and proposal forms (if a non-FastGrant proposal).

Click on **Proposal Info** to view a summary page of proposal information.

Click on **FastGrant** (if a FastGrant proposal) to view Grants.gov forms included with the submission.

Click on **CommLog** to enter any notes or communications about the proposal.

Click on **Modify Level** if changes need to be made to the routing list. Changes can only be made to levels AFTER the current approval level.
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The proposal approval page will show the approver’s level as pending—with a “clock” icon next to it. The proposal approval page will automatically open with the “Accept Proposal” option highlighted. A “Hold Proposal” option is grayed out but can be selected if approver is not yet ready to enter their approval. Selecting to “hold a proposal” will keep the proposal at current approver’s level and resend a routing email notification link to the level.

When an approver is ready to approve, optional comments can be entered that will be retained on the proposal routing page as well as included in the routing email sent to the next level in the approval sign-off.

Click **Update** to enter and save the approval.
How to Approve a Proposal

After updating, the proposal routing page refreshes to reflect a “Pending” status indicating there are still other approvers that must review and approve or a “Completed” status indicating approver was last level to approve. For the approver, their level now shows a “check” icon as confirmation that approval task is complete.

After the approval is complete, the approver should always click Exit at top of screen to end the SmartGrant approval session.

NOTES: