

Pioneer eRA Proposal Review and Approval guide

Last Updated: 8/4/2020

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Welcome

This document is designed to help you, as a designator approver to find step-by-step information on proposal pre-review and approval using Pioneer eRA.

Internal proposal review & approval process takes place prior to proposal submission. Proposals have deadlines so, please review them and approve in a timely manner.

This electronic process will streamline the traditional approval process replacing all paper forms and email communications. Either a PI or an associated Department administrator will initiate the routing process. Your administrators have configured a route path for each of the following requests.

1. [IDC Waiver \(or\) Cost share waiver](#)
2. [Budget & Proposal Review and Approval](#)
3. [Final Check](#)

If you are a designated approver assigned to one of the following roles in Pioneer eRA, you will receive an email notification from Pioneer eRA when your route step becomes active. From the email you receive, you must review the proposal and approve the routing request from the Reviewer Dashboard.

1. [PI](#)
2. [Department Administrator](#)
3. [Chair](#)
4. [Dean](#)
5. [Budget Officer](#)
6. [Research administrator](#)
7. [Executive Director](#)

When will a routing take place in PD?

All new proposals created electronically in PD module must be routed electronically prior to submitting to the sponsor. If you are a PI or a department administrator working on a proposal submission, you should submit the routing from your Proposal Development record for each of the following requests:

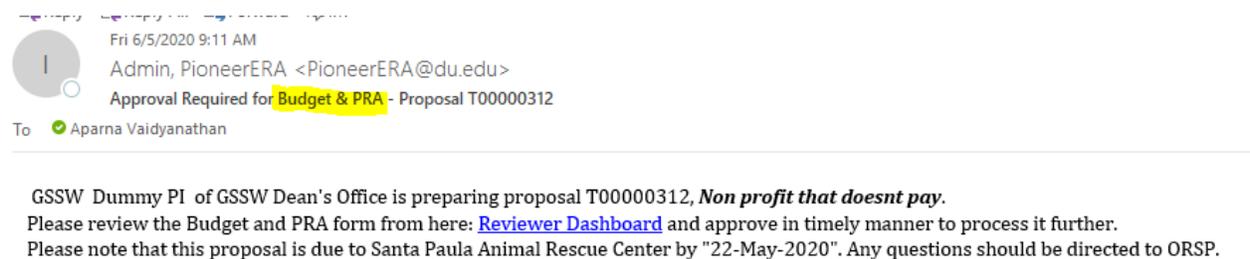
- 1) Cost sharing request
- 2) IDC Waiver request (F&A Waiver)
- 3) Detailed budget review and Proposal Review and Approval (PRA)
- 4) Final Proposal Approval (when application is ready for submission)

If you are a PI and not the submitter, you will be required to review and approve the request. If you are a PI and the submitter, your department administrator will be required to review and approve the request.

Approval Process

Step 1: Click on the **Reviewer Dashboard** link from the email you received from Pioneer eRA

Below is an example of a routing notification for Budget & PRA. The subject of the email will display the name of the routing request that a PI or a department admin has initiated. In this example, the department administrator has initiated a routing for Budget and PRA review for the proposal T00000312.



Step 2: Login to Pioneer eRA using your DU email and Pioneer Web password.

(<https://pioneerera.du.edu>)



UNIVERSITY of DENVER

DU email (first.lastname@du.edu)

Password (your PioneerWeb password)

> Forgot your password?
> Need Help?

Login

Step 3:

You will be directly taken to the landing page of your Reviewer dashboard. Please read the Help text if you are approving a request for the first time. You may click on the "Route" tab in the side pane to see who has reviewed before you and who will be reviewing after your step.

Review Dashboard - Google Chrome
pioneerera-dev.du.edu/messaging/ReviewItem.asp?RoutedStepID=2394353E-1DF2-4083-A4CA-676C21629670

HELP

You have been identified as someone who needs to perform an On-line Review. The "Review Dashboard" allows you to:

- "See Comments" others have made when they reviewed this item
- "Add Comments" to this item
- Indicate "Your Decision" on the Review of this item
- See the "Routing Progress" that this item has/will take

Many of the items being reviewed have deadlines, so please act accordingly. In order to access this information, you will need to be logged in. If you are unsure of your username/password please click [here](#).

1. Review the items listed on the "Review" tab, marking each item "Reviewed" when you have completed your review of it. Note that "Not Applicable" may be an option and if so, you may select that instead of "Reviewed" when appropriate. No item can be left "Un-Reviewed" to continue.
2. Add any comments to the PI, reviewers, administrators or all viewers as appropriate and click the SAVE icon.
3. Select a value in the "Decision" menu. You may be prompted to acknowledge specific representations and certifications. You must "Accept" these in order to proceed if presented. Click the SAVE icon to confirm your decision and complete your review.

If you intend to "Add Comments", you should do so before you set your decision. Once you set your decision and save, you will not be able make any additional changes, i.e. "Adding Comments" or changing "My Decision" after your decision is saved.
If you have any questions regarding your involvement in this process, or what is expected of you please contact:

PioneerERA Admin ✉
University of Denver (Colorado Seminary)
2199 S. University Blvd.
Denver, CO 80210-4711

REVIEW

ROUTE

Close

Step 4:

Click on Review tab (Orange) in the side pane.

Then, click on the 'Proposal Development Record' link to review all the requested items for the proposal.

HELP

REVIEW

ROUTE

Proposal - Initial Application

Number: [T00000312](#)

Title: Non profit that doesnt pay

Sponsor: Santa Paula Animal Rescue Center

Submitted:

Form/Document	Document Type	Submitted	Review Status
Proposal Development Record		20-May-2020 11:21:29 AM	Un-Reviewed

Add Comments:
To be shared with everyone

Select a decision:

- Approve
- Approve with conditions
- Rework needed
- Will not approve

Comments I can see...
No Comments have been recorded

Close

Step 5:

The proposal record will open in a new pop-up window.

Based on the approval request email (F&A, Cost Share Or PRA) you received, click on the highlighted tabs in the left pane. For example, if the routing is for Budget and PRA, you must click on both Budget and PRA tabs and review them separately.

Once you have reviewed the requested information, click **“Done”** in the upper left corner to exit out of this proposal record.

The screenshot shows a web browser window with the URL `pioneerera-dev.du.edu/Proposal/pd/pdEformTab.asp?ProjID=47370349-EC2A-48C8-BCF9-9B316C2C5628&ObjectFormId=88C...`. The page header includes a hamburger menu, 'Done' and 'Save' buttons, and the text 'Non profit that doesnt pay' and 'GSSW Dummy PI - GSSW Dean's Office (Santa Paula Animal Rescue Center)'. The proposal ID 'T00000312' is displayed in the top right.

The left sidebar contains a list of navigation tabs: 'Setup Questions', 'Cost Sharing Form', 'F&A Waiver Form', 'Personnel', 'Budget', 'PRA Form', 'Internal Routing & Uploads', 'Finalize', 'Tasks', and 'Management Record (PT)'. The 'Cost Sharing Form', 'F&A Waiver Form', 'Budget', and 'PRA Form' tabs are highlighted with red boxes.

The main content area is titled 'F&A Cost Waiver Request' and features a 'Validate' button. It contains the following information:

- Question: 'Please answer this question' with options Yes and No. The question is 'Is there a F&A waiver?'.
- Metadata:
 - PI/Dept: Dummy PI, GSSW
 - Department: GSSW Dean's Office
 - Agency: Santa Paula Animal Rescue Center
 - Due date: 22-May-2020
- Instruction: 'If you answered 'Yes', please fill out the following for the F&A Cost Waiver Request:'
- Field: 'Link to Funding Announcement or Application Guidelines link'.
- Text: '(or)'
- Field: 'Sponsor F&A Letter Upload'.
- Question: Yes No 'Is there a limit on the number of applications from an Institution?'.
- Field: '* Full DU Negotiated F&A Cost Rate' with a value of 50.70 and a link '(FY19ratesummary)'.

Step 6:

When you are back on the reviewer dashboard,

1. Add your comments in the text-box provided.
2. “Approve” button will be disabled when the Review Status shows “Un-Reviewed”. Change the Review Status to ‘Reviewed’ from the drop-down. If multiple documents/forms are listed under Form/Document, please select an appropriate status for all the documents listed (Reviewed or Not applicable) to move to the next step.
3. Click on ‘Approve’ under ‘Select a decision’ and wait for the screen to refresh. The screen will automatically close once your approval has been processed.

The screenshot displays a reviewer dashboard for a document titled "Proposal - Initial Application" (Number: I00000312). The document is submitted by "Santa Paula Animal Rescue Center" on May 20, 2020. The review status is set to "Reviewed". The reviewer has added a comment "Reviewed and approved" and selected the "Approve" decision. The dashboard includes a sidebar with "HELP", "REVIEW", and "ROUTE" options, and a "Comments I can see..." section showing no recorded comments.

Form/Document	Document Type	Submitted	Review Status
Proposal Development Record		20-May-2020 11:21:29 AM	Reviewed

Add Comments:
To be shared with everyone

Select a decision:

- Approve
- Approve with conditions
- Rework needed
- Will not approve