# RESEARCH ADMINISTRATION PORTAL (WRAP)

# Specialist Review Quick Guide

## Topics



## Overview

This quick guide is designed specifically for this training session, providing step-by-step instructions for participants responsible for conducting the specialist review of research funding proposals. It outlines the process of reviewing proposals after department approval and once they enter the specialist review status. The guide covers assigning specialists, reviewing proposals, requesting and verifying changes, modifying ancillary reviews, and submitting proposals to federal sponsors. Additionally, it includes instructions for responding to Just-In-Time (JIT) requests and updating proposal statuses based on sponsor determinations. The steps are intended for training purposes, and participants are encouraged to make their own adjustments during the session as needed.

## Steps

### Access

**Training (Staging) Access**

1. Navigate to WRAP Electronic Research Administration Systems: https://researchoperations.wvu.edu/resources/administration-and-compliance-systems
2. Click the **WRAP Test** button.
3. Click the Client Login button.
4. Sign in with your SSO credentials

**Production Access**

1. Navigate to WVU Research Operations Website: https://researchoperations.wvu.edu/home

2. Click the **WRAP** button.
3. If prompted sign in with your SSO credentials.

## WRAP Dashboard Terms & Definitions

- **Create Menu:** Create drop-down menu buttons that allow you to create various items in the system, such as proposals or agreements
- **Recent: L**ists the last several items a user has accessed, with the most recent at the top. Items can be pinned for quick access using the pin icon.
- **Pinned:** Pinned items are stored for easy access, regardless of when they were last viewed. Pinned items remain until manually unpinned.
- **My Inbox:** Displays all items requiring user action to move forward in the workflow e.g. proposals, agreements, and awards.
- **Assignments:** Displays workload volume and assignments.
- **In Process**: Summarizes your assigned volume by state (Draft, Department Review, Pending Sponsor Response, Pending Team Response).
- **State Column:** Shows item workflow status and helps guide the next steps.
- **Personalize Table:** Users can adjust table settings using the gear icon, enabling them to configure the columns and data that appear. They can also export data to CSV files.
- **Top Navigator:** The main navigation tool at the top of the dashboard allows users to move to different parts of WRAP.
- **Breadcrumb Trail:** Located under the top navigator, this trail indicates the current page and allows users to navigate back to previous pages.
- **Filter by Text:** Type the first part of the text you want to find. Use % as a wild card. Users must prepend the '%' wildcard before entering search terms (e.g., '%defense') when using the search function. Add a prompt or help text instructing users to use a wildcard before typing search terms.

## Exercise #1: Assign a Different Grants Specialist

1. Open the relevant funding proposal.
2. Click **Assign Specialist** in the proposal workspace.
3. Select a new specialist from the list.
4. Click **OK** to save the assignment.

- The new specialist's name appears in the proposal summary.
- The History tab shows that the specialist assignment has been updated.
- The funding proposal no longer appears in the original specialist's inbox.

## Exercise #2: Review a Funding Proposal, Budget & SF 424 (Specialist)

1. Open your **Inbox** and select the assigned funding proposal. This will take you to the **Funding Proposal Workspace**.
2. Review the following tabs:
   - **Reviewers Tab**: Check who approved the proposal during department review.
   - **History and Reviewer Notes Tabs**: Review any requests for changes or clarifications and the responses from the Principal Investigator (PI).

**Ancillary Reviews**

1. Click **Manage Ancillary Reviews** to check that all required reviews are complete.

**Note:** Depending on the internal process, some types of ancillary reviews will be required to be completed prior to proposal submission, but for today's training exercise, we can ignore any that are incomplete.

**COI Disclosure**

1. Click the **COI Disclosure Status** button to view training and disclosure dates of the key personnel.
2. If any personnel are missing those dates or have dates that are older than 365 days, use the **Send to COI** activity on the Funding Proposal Workspace – this will initiate a system-generated prompt to the noncompliant personnel to update their disclosure and training dates.

**Review Funding Proposal**

1. Click **Edit Funding Proposal** to review the main proposal pages.
2. Check for any reviewer comments added by department reviewers and their responses.
3. Note on the Submission Information page that the proposal creator has indicated that this proposal will be submitted System-to-System.
4. Once finished with your review, save and exit the Funding Proposal SmartForm.

**Review Budgets**

1. Go to the **Budgets Tab** and click the **Budget Name** to open the budget workspace. Click **Edit Budget** to review the budget pages and make notes of any changes or clarifications needed.

   **Note:** One of the budgets will be for cost share – any time you see a cost share budget you should expect to see a **Cost Share Approval** ancillary review assigned to the department.

**Review SF424**

1. In the **Funding Proposal Workspace**, click the **SF424 Link** to access the SF424 workspace. Click **View Grant Application** to review the SF424 forms and make notes of any required changes.

   **Note:** Compare the RR budget to the proposal budget and check that the totals and categories are aligned. It can be helpful to open them in separate tabs to compare side by side.

2. For this training, imagine that you notice a small correction that you need to make prior to submission. Exit the SF424.
3. On the SF424 Workspace, click **Reopen for Edit**, then use the **Edit Grant Application** to open it. Make a change (for example, update one of the PI address lines).
4. Exit the grant application, and click **Validate Submission**. If any validation errors are noted, make the required updates and rerun the "Validate Submission" until the state changes to **Ready for Submission**.
5. Return to the **Funding Proposal Workspace** and submit your requests for changes or clarifications to the proposal team.

## Exercise #3: Request Changes (Specialist)

1. **Open the funding proposal** and review for changes.
2. On each page or for each question where a change is needed, add a **review note** directly on that page.
3. If there is no specific section to address a particular issue, you will have the opportunity to add **notes** before returning the funding proposal to the Principal Investigator (PI).
4. **Exit** the proposal, and your notes will be automatically saved.
5. Click **Specialist Request Changes** to submit your change requests to the PI.
6. If needed, check the box to send the proposal through **department review**.
7. Add any **additional comments** and click **OK** to route the proposal back to the PI.
8. The system will notify the **PI** and the **administrative contact**.
9. The PI is responsible for reviewing and responding to your **change requests**. Once the PI resubmits the proposal, you will proceed with the next steps in the review process.

**Note:**

1. Wait a few minutes for the Training coordinators to send your proposal back with the clarifications you had requested.
2. Refresh your inbox until you see the proposal appear, then open it and navigate to the proposal SmartForm to ensure they provided a response to your reviewer comment.

## Exercise #4: Submit a Specialist Review

1. As a specialist, open the relevant funding proposal.
2. Once you have confirmed the proposal is ready for submission, click **Final Review i**n the proposal workspace.
3. Enter any relevant comments in the provided field.
4. Click **OK** to complete the action.

    - The funding proposal status changes to **Pending Submission to Sponsor**.
    - The "Submit to Federal Sponsor" activity becomes available in the proposal workspace.

## Exercise #5: Submit the Funding Proposal to the Sponsor

1. As a specialist, navigate to the SF424 workspace.
2. From the proposal workspace, click the **SF424** link in the summary area. Ensure that the status is Valid for Submission.
3. Click **Generate PDF Version** to create a document to be submitted to the sponsor. Ensure that **Include Attachments** is selected.
4. Click **OK** to generate the document.
5. (Optional) View the generated PDF by clicking the appropriate link in the SF424 workspace.
6. In the SF424 workspace, note the **Submit to GrantsGov** activity. (For this exercise, assume this action has been completed.)

Notes:

- You can refresh the page routinely for the next few minutes to see the status of the application change – once it has a tracking number, the application can be considered complete.
- In a real world scenario, this is the point where you can log in to grants.gov to view the application as well.

7. Use the breadcrumb navigator to return to the funding proposal workspace.
8. Click **Submit to Federal Sponsor** to mark the proposal as submitted.
9. Enter any comments if necessary, then click **OK** to finalize the submission.

- The funding proposal status updates to **Pending Sponsor Review**.
- New activities related to sponsor review, such as "Funding Anticipated" or "Award Letter Received," become available in the workspace.

## Exercise #6: Notify PI that JIT Changes Are Required

1. From the funding proposal workspace, click **JIT Changes Required**.
2. In the Comments box, instruct the PI to attach an updated current and pending support document and add a facilities ancillary review, then click **OK**.
   **Note:** Ancillary reviews can be initiated at any point in the proposal workflow.