

How Do I Approve A Proposal?

Approvals for all proposals are gathered electronically in UFIRST. This system allows for “pools” of approvers at each approval level. All approvers at each approval level are notified concurrently when the proposal is submitted into workflow but only one approver needs to act.

If the approver is the final approval level before the proposal is submitted to DSP, they will not be able to *approve* until the PI has certified. Once the PI has certified, the Approver can execute the **Approve** activity and the proposal will be forwarded to DSP for review.

Steps

1. Click the link provided in the email notification sent to each approver.



This is an automated notification email. Please do not reply to this email.

From	Allie Gator
Link	PRO0000025
Proposal Title	The Effect of Facebook on Social Skills
Principal Investigator	Abram Lise
Sponsor	Psychology Beyond Borders

ACTION REQUIRED

The above proposal is ready for your review and approval. Click the link above to access the proposal workspace. Review the Proposal and Budget information. Complete your review by executing the Approve, Request Changes, or Disapprove activity.

Note: if there are multiple authorized approvers in your unit, only one approver is required to respond.

If you access UFIRST directly without clicking on the link, the proposal will be in **My Inbox**, the first page you land on when logging in.

2. Review the information displayed on the **Summary** tab.

The screenshot shows the UFIRST interface with the 'Summary' tab selected. The proposal title is 'The Effect of Facebook on Social Skills' and the workspace ID is 'PRO00000025'. The 'Summary' tab is highlighted in red. The interface is divided into several sections:

- Department Review:** Includes buttons for 'View Proposal SmartForm' and 'Access Budget Workspaces'.
- Create...:** Includes a 'New Agreement' button.
- My Activities:** Includes 'Approve' (checked), 'Request Changes', and 'Disapprove' (with a red X icon).
- Proposal Information:**
 - Principal Investigator: Lise Abrams
 - Submitting Department: LS-PSYCHOLOGY-DC
 - Sponsor: NATL INST OF HLTH
 - Deadline: 1/30/2015
 - Opportunity Limited?:
- Budget Information:**
 - Project Period: 5/5/2015 - 5/4/2018
 - Number of Periods: 3
 - Total Direct: \$515,882
 - Total Indirect: \$134,129
 - Total: \$650,011
- Cost Sharing Information:**
 - Cost Sharing Direct: \$892,949
 - Cost Sharing Indirect: \$444,974
 - Cost Sharing Total: \$1,337,923
 - Cost Sharing Type: Vol. Man
- Additional Commitments:**
 - Space - Renovation, Alteration, or Additional: No
- Primary Unit Contact:** Fields for Name, Email, and Phone.
- DSP Contact:** Fields for Name, Email, and Phone.
- Compliance Information:** Field for Human Subjects.

In the **Summary** tab you are provided with key elements about the proposal. This information includes, but is not limited to Key Personnel commitments and Additional Commitments sections. You can also review additional tabs that provide budget details, attachments, and a history of other activities.

3. Select **Approve**, **Disapprove**, or **Request Changes** for the reviewed proposal.



- Approving this proposal indicates that your unit accepts responsibility as outlined in the University of Florida Sponsored Programs Roles & Responsibilities at: <http://research.ufl.edu/sponsored-programs-roles-and-responsibilities.html>. The approver can add comments or attachments to be viewed by the Proposal Team and anyone who has access to the proposal.
- Requesting changes indicates that the proposal is almost ready for approval, but changes must be made before you will approve. When requesting a change, it is recommended that the request is sent to the entire Proposal Team and not just one individual.
- Disapproving a proposal will terminate the proposal. Details must be provided in the Comment section informing the Proposal Team about the disapproval. This activity should be used when the proposal is found to be completely unacceptable or if the changes are so significant that the proposal should be terminated.

After each approval, the next level will receive an email notifying them that it is their turn to review and approve. Once the final level of approval has approved, the proposal will be sent to the Division of Sponsored Programs. The proposal will disappear from the approver's **My Inbox** but is available for tracking in the **Proposal Worklists**.

Contact Information:

Division of Sponsored Programs (DSP)
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