

Ancillary Review for Contracting Proposal Review

As Pre-Award prepares a Funding Proposal for submission, there may be documents that require review or action from a Contract Analyst. This will be completed by initiating an Ancillary Review.

Examples of Documents requiring Contracting Review:

- Terms and Conditions must be reviewed at submission time.
- If submitting to an Industrial Sponsor or National Lab?
- Intellectual Property questions
- Any documents or language that must be reviewed prior to proposal submission.

(see Contracting Review Decision Tree for additional information)

Initiate the Ancillary Review

To initiate a Contracting Ancillary Review, Pre-Award will send an email to SPS Contracting. This email will then be reviewed and assigned to a Contract Analyst. Support staff will then create the Ancillary Review.

1. Select "Send Email" from the Funding Proposal Workspace.



2. Complete the Send Email Form.

The screenshot shows a 'Send Email' form with the following sections:

- 1. * Email subject line:** A text box containing 'Proposal Review: Sponsor/PI - Due Date'.
- 2. * Select at least one group of recipients:** Four radio button options: 'All team members', 'All editors', 'All readers', and 'Specialist'. Below these is a text box for 'Select any other recipient for this email: (Only editors and readers have access to the funding proposal.)' with a search icon. A table below shows a search result for 'SPS Contracting' with columns for 'First Name', 'Last Name', and 'E-Mail'.
- 3. * Comments to be included in the email:** A text area containing instructions: '- If response is required in less than 5 days, include "URGENT" as the first word in the Subject Line and Comments section.', '- Include specific instructions that include: - The reason for review.', '- Add the page number of section for review.', '- Enter the date a response is required (calculate 5 days prior to sponsor due date)', and '- Include relevant documents as an attachment to the Ancillary Review.'
- 4. Supporting documents:** A section with a '+ Add' button and a table with a header 'Name'. One document is listed: 'Contr Doc for Review.pdf(0.01)' with a file icon and a search icon.

At the bottom right, there are 'OK' and 'Cancel' buttons.

1. Email subject line: Proposal Review: Sponsor/PI – Due Date

2. Select recipients: In the text box add SPS Contracting or search to add.

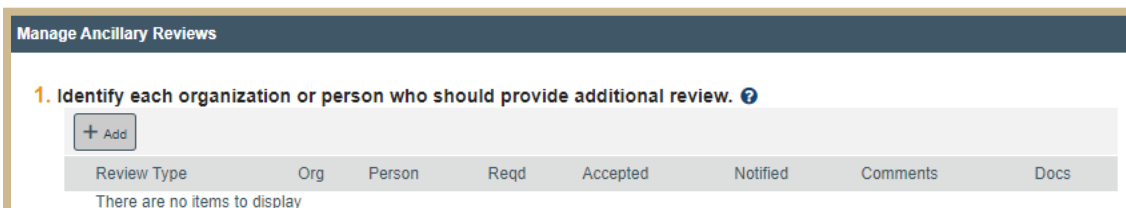
3. Comments to be included in the email:

- If response is required in less than 5 days, include "URGENT" as the first word in the Comments section.
- Include specific instructions in comments section that include:
- The reason for review.
- Add the page number of section for review.

- Enter the date a response is required (calculate 5 days prior to sponsor due date)
- 4. Supporting documents: Include relevant documents as an attachment to the Ancillary Review.
- 3. A system generated email notification will be sent to the spscontr@purdue.edu email address.
 - a. This email will be reviewed by the support staff and assigned to a Contract Analyst.
- 4. Support staff will forward the system generated email to assigned Contract Analyst AND Pre-Award Specialist to inform all parties that the Proposal Review is assigned and the Ancillary Review will be created.
- 5. Support staff will create the Ancillary Review for the Funding Proposal.
 1. Select "Manage Ancillary Review" from the Funding Proposal Workspace.



2. Click Add on the Manage Ancillary Review pop-out screen.



Add Ancillary Review

1. * Select either an organization or a person as reviewer:

Organization:

Person:

2. * Review type:


3. * Response required? ?

Yes No [Clear](#)

4. Comments: ?

- If response is required in less than 5 days, include "URGENT" as the first word in the Subject Line and Comments section.
- Include specific instructions that include:
 - The reason for review.
 - Add the page number of section for review.
 - Enter the date a response is required (calculate 5 days prior to sponsor due date)
 - Include relevant documents as an attachment to the Ancillary Review.

5. Supporting documents: ?

Name
 Contr Doc for Review.pdf(0.01) ...

3. Person: Assigned Contract Analyst

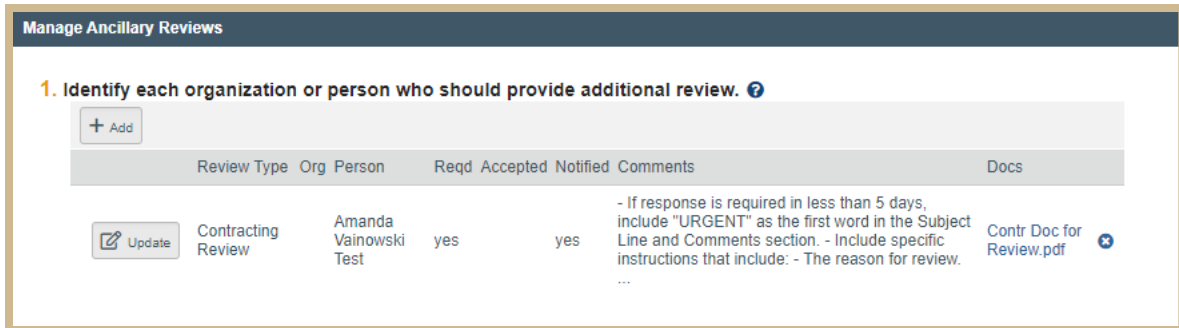
4. From the review type drop-down, select Contracting Review.

5. Select 'Yes' for Response Required if a response is needed prior to proposal submission.

6. Comments: Copy and Paste the Comments from the system generated email.

7. Supporting Documents: Attach the system generated email which includes any other relevant attachments from the Pre-Award Specialist.

8. Select OK to Save and close the page.



9. On the Manage Ancillary Review page, verify the information is correct for the Ancillary Review and select OK. This will send an email notification to the individuals in the COI Organization and place this Funding Proposal in their inbox.

***The Contract Analyst assigned to the Review will receive a system generated email with information related to the Review request. The Funding Proposal will also appear in the Inbox on the individual Dashboard.*

Submit Ancillary Review

6. The Contract Analyst will review the request and respond to the Pre-Award Specialist by Submitting the Ancillary Review. Notes and any required documents will be added to the Submit Ancillary Review page.

7. A system generated email will be sent to the Pre-Award Specialist notifying them of the completed review.

To: Jenny Siemers Test

Link: [FP00000800](#)

PI: Rebecca Simms (pi)

Title: Training Documentation

Ancillary review has been completed for the Funding proposal. Click the link above to access and review the submission details.


Comments:

Send attached with Proposal

Supporting Documents:

[Contr Doc for Sponsor.pdf](#)

8. The Ancillary Review information can also be found in the History tab.

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log		
		Activity					Author			Activity Date
<input checked="" type="checkbox"/>	Ancillary Review Submitted						Vainowski Test, Amanda			8/17/2024 1:21 PM
		Send attached with Proposal								
	Contr Doc for Sponsor.pdf									

NOTE: The proposal should not be submitted to the sponsor until a response is provided by the Contract Analyst.