Quick Reference Guide
SPARTA: Reviewing and Approving Proposals

This quick reference guide will explain how to Review and Approve Proposals that have been entered into SPARTA (Sponsored Programs Application for Research Tracking and Administration).

When a Funding Proposal, Budget, Letter of Intent or Follow-on Submission is ready for review, it will be routed to your SPARTA inbox (My Inbox) which is immediately accessible upon login. You should also receive an automated email notification at your case.edu address specifying the name and type of item which requires your review.

Finding a Proposal, Budget, Letter of Intent or Follow-on Submission

1. Select your reviewer role from the My Roles list on the left side of the page (e.g., Proposal Team – PI, Authorized Organization Representative).
2. Click the tab labeled My Inbox.
3. Scan the resulting list for the name or number of the item in question.

**NOTE:** Different types of tasks are distinguished with an ID prefix or suffix. For instance, funding proposals are preceded with FP, an IPAS is preceded with IPAS and budgets with BU.

4. Click the Name of the item to open its workspace.
5. The tabs under the project name present important information about the project quickly.

Logging In

1. Type case.edu/SPARTA into your internet browser.
2. Save as a favorite or bookmark.
3. Type your CWRU ID and Password in the user name and password text boxes.
4. Click the checkbox labeled Remember me if you would like to be automatically logged in each time you visit case.edu/SPARTA
5. Click Login.

Follow these steps to login to SPARTA, review the work, add comments, and either approve proposals or request changes.
Review Tasks Overview

1. Click **Financials** to view consolidated budget information (including sub-awards when they apply).
2. Click **Reviewer Notes** to view documentation from a previous review (when applicable – this is in the set of tabs in the lower half of the screen).
3. Click **Project Information** to review high-level proposal information and budget totals.

**NOTE:** If the SF-424 is to be reviewed in detail also, click the link to that document found on the Project Information tab.

4. To review Smartform responses (the Funding Proposal Smartform replaces the eURF) click **Edit Funding Proposal** (or Edit Budget, Edit IPAS or Edit LOI depending on the item type).

Add a Reviewer Note

1. Depending on your role, you may need to add a **Reviewer Note**. Click **Add** in the yellow bar at the top of the page to do so.
2. Choose the type of note from the drop-down list.
3. Enter the body of the note into the text box provided.
4. Click **OK** to add or **Cancel** to return to the previous screen without changes.

5. The type of note, its body, author, date created and date modified will appear at the top of the screen.

Respond to a Reviewer Note

1. Click the link labeled **Click here to respond** to reply to a Reviewer Note.
2. Choose the type of response (i.e., Change Complete, Change Not Complete or Information Only) from the drop-down list.
3. Enter the body of the response in the text box.
4. Click **OK** to add or **Cancel** to return to the previous screen without changes.
5. The type of response, its body and author will appear at the top of the screen, highlighted in green.

Request Changes and Return to Previous Step

1. Select the appropriate task from the **My Activities** list to the left of the screen.

**NOTE:** The tasks shown in **My Activities** are context specific and may vary based on role & workflow state.

2. When requesting changes from a resource in a previous workflow step explanatory or clarifying comments are required. When needed, documents or images may also be attached.
3. Click **OK** to request changes or **Cancel** to return to the proposal.

Approve and Route to Next Step

1. Select the appropriate task from the **My Activities** list on the left of the screen.
2. For each approval and submission step, a confirmation (attestation) is required of the submitting resource (example follows). Click the **Confirmation** check box to complete this step.
3. Review any **Warnings or Errors** (shown below the red text) before submitting to the next workflow step.
4. Reviewers are strongly encouraged to provide explanatory and clarifying comments.
5. Click **OK** to submit to next workflow step or **Cancel** to return to the proposal without submitting.

Continued from other side