Reviewing an application in Themis Grant Submissions

Once a person has completed a draft application, they have the option to nominate whether they would like another academic or an administrator (e.g.: a Research Coordinator) to check the grant submission before it is forwarded to the Head of Department or their nominee for approval and submission to the Research Office. You will receive an email notification for each grant submission you have been designated to review.

Review a grant submission application

1. Log on to Themis using your UOM Research Self Service responsibility.
2. Select the Grants Submission Workbench function located in the Grants and Contracts section. The Submission Search Page will display.
3. Locate the Submissions for Review section.
   This section will display a list of all records you have been requested to review. **Note:** this list will only display up to 10 records. If you have more than 10, use the Next 10 link to progress to the next group.
4. Click on the View icon associated with the submission you wish to review. The Submission Summary screen will display.

This screen will show all the data entered for this submission (e.g.: submission title, clearance type and status, FoR/SEO codes, participants, etc) as well as the status history (e.g.: when it was created, if it has been sent for review previously, etc).

5. Review the submission details.
6. Action the submission as appropriate.
   You may either forward the submission to the HOD (or Alternate Approver) for approval or seek further clarification from the appropriate participant. Refer below for further details regarding these actions.

   **Note:** while it is possible to update the submission record yourself, this should only be done for minor changes (e.g.: to correct spelling, etc) and any significant modifications should be returned to the appropriate participant.
Approve and forward a grant submission record

Use the **Update Submission** function to progress the submission record to the Head of Department (or nominee) for approval. **Note:** if no Alternate Approver is nominated the submission will automatically be sent to the Head of Department listed on the screen.

1. Navigate to the Submission Summary screen for the appropriate record.
   From the Grants Submission workbench, click on the **View** icon.

2. Click on the **Update Status** button.
   The Submission Status screen will display.

3. Complete the Submission Status information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select New Status</td>
<td>Change the status from <em>Under Review</em> to <em>Forwarded to HOD.</em></td>
<td></td>
</tr>
<tr>
<td>Alternate Approver</td>
<td>If you are submitting the record to an approver other than the one listed on the screen, click on the <strong>torch</strong> icon and retrieve the appropriate staff member from the list of values.</td>
<td>By default, the submission will be sent to the Head of Department listed unless you enter an alternative approver. <strong>Note:</strong> the alternate approver selected must have the authority to approve the submission on behalf of the Head.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any appropriate comments for the Head of Department or approver.</td>
<td>Comments entered in this field will display in the notification record.</td>
</tr>
</tbody>
</table>

4. Click on the **Submit** button.
   A confirmation message will display, advising that the application has been submitted successfully.

**Note:** The submission record will no longer display in the *Submissions for Review* section of your Grants Submission Workbench. It will display, instead, in the Workbench of the Head or Alternate Approver.

Return and refer a grant submission record

Use the **Update Submission** function to return the submission record to the appropriate participant if it requires further clarification or updating prior to approval by the Head of Department. **Note:** when you return the submission record to *Draft* status for further clarification the notification will be sent to the Agreement Administrator listed in the Participants’ screen.

1. Navigate to the Submission Summary screen for the appropriate record.
   From the Grants Submission workbench, click on the **View** icon.

2. Click on the **Update Status** button.
   The Submission Status screen will display.

3. Complete the Submission Status information.

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<tbody>
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<td>Select New Status</td>
<td>Change the status from <em>Under Review</em> to <em>Draft.</em></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Enter your query, request, feedback or any appropriate comments regarding the submission.</td>
<td>Comments entered in this field will display in the notification record.</td>
</tr>
</tbody>
</table>

4. Click on the **Submit** button.
   A confirmation message will display, advising that the application has been submitted successfully.

**Note:** The submission record will no longer display in the *Submissions for Review* section of your Grants Submission Workbench. It will display, instead, in the participant’s Workbench and an email will be sent to the Agreement Administrator.