**Conduct a Specialist Review**



**Work Instructions:**

1. Log into Click Portal.
2. From your Inbox, on the SPO Tasks tab, open the funding proposal to review.

If the proposal is not in your Inbox, click the **Grants** tab at the top. On the All Single Proposals tab, open the proposal in Specialist Review. You can filter the data as follows:

* **Filter by:** Select the column to filter by from the drop-down menu and then type the first few characters for the item you want to find. Click **Go**. The system returns all items matching the criteria. To apply multiple filters, see Advanced below.

Note: You can also type a % symbol as a wild card before the characters. For example, if you filter by “Name” and then type “%Lung” and click **Go**, the system returns all proposals with “Lung” in the name.

* **Advanced:** Click the **Advanced** link to the right of the Filter by feature. Enter filter criteria (see above). To add more criteria, click **Add Another Row**. Click **Go** to apply the filters.

1. From the workspace, review the funding proposal, budgets, and SF424 (Grants.Gov submissions only) as follows:
   * **Funding Proposal:** Click the **View Funding Proposal** button on the left to view each page of the proposal or **Printer Version** to view the proposal in one scrollable page.
   * **Budgets:** Click the **Budgets** tab and then the Budget name to open it. From the budget workspace:
     + Click the **View Budget** button on the left to view the budget pages or **Printer Version** to view the budget in one scrollable page.
     + If the budget has a subaward/subcontract, on the budget workspace, click the **Subaward/Subcontract** tab and then the budget name to open it. Click the **View Budget** or **Printer Version** button to view the budget pages.
   * **SF424:** From the Proposal Information area at the top, click the SF424 link. From the SF424 workspace, click the **View Grant Application** button on the left to view the SF424 pages or **Printer Version** to view the SF424 in one scrollable page.
2. If changes are required, perform the following:

* For significant changes, such as changes to budget numbers or project personnel, send the proposal back to the proposal team to make the changes.

Note: Steps for requesting changes to a proposal are covered in other work instructions.

* For small administrative changes, such as correcting spelling errors or changing an email address, update the proposal (and SF424) yourself.

Note: For Grants.Gov submissions, steps for updating and validating the SF424 are covered in other work instructions.

During your review, you can also perform the following activities:

* Email the proposal team about the proposal by clicking **Email Proposal Team**.
* Update research attachments.
  + **Grants.Gov Submissions:** Click **Update SF424 Research Plan** and then **Add** to browse for and upload a document. You will need to validate the SF424 to ensure the changes you made didn’t result in any errors.

Note: Steps for updating and validating the SF424 are covered in other work instructions.

* + **Non-Grants.Gov Submissions:** Click **Update Project Attachments** and then **Add** to browse for and upload a document. All research attachments must be complete to submit the proposal to the sponsor.

The proposal is still in Specialist Review. After you have finished the Specialist Review and the proposal, budget, and SF424 (if applicable) are complete, your next step is to submit the proposal to the sponsor.

