How to Initiate an Ancillary Review

Security Role(s): Study Staff – All UW employees have this role.

UW-Madison uses the Ancillary Review functionality to add various approvals to records in RAMP.

1. Start by accessing the project record from the RAMP Dashboard or by searching for the appropriate record in RAMP. Select the project name to display the project Workspace.

2. On the project Workspace page, select the Manage Ancillary Reviews activity button.

3. In the Manage Ancillary Reviews window, select Add.

4. In the Add Ancillary Review window, complete the questions and note the following. Select OK to continue.

   a. Q1. Select either an organization or person as a reviewer.
      i. Select the ellipsis button (three dots "...") next to the "Organization" or "Person" field to select the appropriate reviewer.
ii. The Ancillary Review Requirements section of the Ancillary Review User Guide (page 11) includes details on UW-Madison’s ancillary review requirements and provides guidance on the appropriate organization or individual to select by review type.

b. **Q2. Review Type** – Select the applicable review type. Available review types are specific to the record. Select the “Other” review option for review types not included in the drop-down list.

c. **Q3. Response Required** – Select Yes or No as appropriate based on the ancillary review requirements outlined in this guide. Some ancillary reviews are required and should be completed before the record is finalized while others are informational only and will not cause workflow to stop.

d. **Q4. Comments** – Add comments as necessary.

   **NOTE**: This question is not in the Manage Ancillary Reviews window in Export Control.

e. **Q5. Supporting Documents** – Add supporting documents as necessary. The ancillary reviewer will have access to all Grants, Agreements, and Export Control records and documents, so project records do not need to be added here.

   **NOTE**: This question is not in the Manage Ancillary Reviews window in Export Control.

5. In the Manage Ancillary Reviews window, repeat the steps above to change the ancillary reviewer/office, comments, or supporting documents as needed. When complete, select **OK**.

6. On the project Workspace, the list of Ancillary Reviews and assigned Ancillary Reviewers are displayed on the Reviewers tab in the Grants module and on the Agreement project Workspace in the Agreements module.