COMMENCING THE PROPOSAL WORKFLOW

1. If you are an OSP Research Administrator (“RA”), you may commence the OSP Proposal & Award Acceptance Workflow (the “Proposal Workflow”) by clicking here.

2. Log in using your full Boise State e-mail address as the Username and your self-selected Password. [Note: Initially, this will not be your regular Boise State login information. If you do not have a password or you have forgotten it, please see the Frevvo User Guide for instructions to change your password.]

3. After logging in, the Proposal Workflow will automatically open.

4. To commence the routing process, the RA must (at a minimum) do all of the following:

   4.1. Type the OSP proposal number in Section 1, General Project Information. [Note: Proposal numbers for amendments / modifications will be the OSP proposal number plus a .1, .2, .3, etc., to refer to the specific amendment being routed. For instance, if the proposal number is 9876, amendment # 1 would be written as 9876.1 and amendment # 2 would be written as 9876.2, etc.]

   4.2. Identify in Section 1, General Project Information, whether it’s a “New Award,” “Supplement” or “Continuation” by checking the appropriate box next to the “Proposal Number (assigned by OSP)” field. Also, identify whether the award is subject to the Uniform Guidance.
4.3. If it’s a Supplement or a Continuation, identify in Section 1, General Project Information, which “Mod #” (i.e., amendment / modification) is being routed. This “Mod #” will need to match the information in 4.1 above. For instance, if “9876.2” is written in the “Proposal Number (assigned by OSP)” field, then this field would be “Mod # 2.” If it’s a “New Award,” leave this field blank.

4.4. In Section 1, General Project Information, type the name of the RA completing this portion of the Proposal Workflow.

4.5. Type the Principal Investigator’s (“PI”) full Boise State e-mail address in Section 2, Investigator Information. Importantly, make sure the username portion of the e-mail address is all lowercase or the Proposal Workflow will not route to the PI as designed. For example, enter username@boisestate.edu and not UserName@boisestate.edu.

**Note:** If the PI is a new faculty member who does not yet have a Boise State e-mail address, please ask the applicable department to work with the Office of Information Technology (“OIT”) to obtain a new e-mail address for the employee (which can be given, in some cases before, the employee actually commences work). If the department cannot obtain a new Boise State e-mail address quickly enough (e.g., the proposal is due immediately), then the RA, after speaking with the OSP Associate Director or OSP Executive Director, may ask the department to process the proposal manually using the paper version of the Proposal Data Sheet. Once the new employee has a Boise State e-mail address, then the proposal will need to be routed again using the Proposal Workflow, as OSP maintains all proposal records in the Proposal Workflow.

4.6. Choose the correct College / Division and Department / Center / Unit from the drop down boxes in Section 2, Investigator Information.

4.7. With assistance from the PI, complete Section 8 (Non-Funded Collaborator, Subrecipient, Subcontractor & Contract / Vendor Information) in accordance with the Frevvo User Guide.

For routing, tracking and search purposes, it is crucial for the above information to be entered correctly in the first step of the Proposal Workflow.
5. If there are one or more Co-Principal Investigators ("Co-PI"), the RA must (at a minimum) also do all of the following:

5.1. Choose “Yes” to the following question at the end of Section 2, Investigator Information: “Are there one or more Co-Principal Investigators (Co-PIs)?” By doing this, a new section about Co-PIs will open.

5.2. Enter the full Boise State e-mail address of the first Co-PI in the new Co-PI section that opens. Importantly, make sure the username portion of the e-mail address is all lowercase or the Proposal Workflow will not route to the Co-PI as designed. For example, enter username@boisestate.edu and not UserName@boisestate.edu.

5.3. For the first Co-PI, choose the correct College / Division and Department / Center / Unit from the drop down boxes in the new Co-PI section that opens.

5.4. The RA will need to complete the same process for all Co-PIs. To add a new section for each additional Co-PI, the RA will need to click the “+” icon on the right side of the screen in the Co-PI introductory section.

Notes: For routing, tracking and searching purposes, it is crucial for the above information about Co-PIs to be entered correctly in the first step of the Proposal Workflow. During the initial roll-out of the Proposal Workflow, Co-PIs and their management will not electronically approve proposals using the Proposal Workflow. However, they will automatically receive copies of the Proposal Workflow via e-mail and will approve proposals by e-mail as shown in the Frevvo User Guide.
6. Depending on the particular situation, the RA may complete additional information and/or Sections in the Proposal Workflow as described in the Frevvo User Guide. Once the RA has completed this task she/he will send the Proposal Workflow to the applicable Departmental Administrator (“DA”). [Note: The Proposal Workflow will automatically route to the correct DA.]

7. To send the Proposal Workflow to the DA, the RA must click “Continue” after Section 11 (Part I: Proposal Data Sheet Certifications / Signatures). It will likely take several seconds for the Proposal Workflow to transmit after clicking Continue.

8. The “Save” button will not send the Proposal Workflow to the DA, but rather, will save the Proposal Workflow in its current state to be completed by the RA at a later time. For more information about using the “Save” feature, please see the Frevvo User Guide.