COORDINATOR, RESEARCH SERVICES PROPOSAL WORKFLOW PROCESSING

1. Notification E-mail

1.1. Once the applicable OSP Research Administrator (“RA”) has completed her/his required actions (i.e., after the Dean or Director) in the OSP Proposal & Award Acceptance Workflow (the “Proposal Workflow”), the OSP Coordinator, Research Services (“CRS”) will receive a notification e-mail with the OSP Proposal Number in the subject line. In this case, the proposal number is 987654321.

1.2. The task e-mail will provide instructions regarding how to log into the Frevvo system so the CRS can complete her/his required tasks.

1.3. The CRS will not log into the Frevvo system until the CRS learns that the applicable proposal (987654321 in this case) has been awarded or will not be awarded. The CRS will not be actively seeking information from potential sponsors, but will wait to be notified.

1.4. **Note:** Please log into the Frevvo system using **Google Chrome** as your browser.
2. Frevvo Dashboard

2.1. Once the CRS logs into the Frevvo system, she/he will see a dashboard containing all of the tasks she/he has in Frevvo system. The CRS will need to identify the “OSP Proposal & Award Acceptance Workflow” section under “My Tasks.”

![Frevvo Dashboard Image](image)

2.2. The CRS will then need to click the ► icon for the task related to the applicable proposal (see above). In this case, the proposal number is 987654321. After several seconds, the Proposal Workflow will open.

2.3. The CRS will not have the ability to edit Part I of the Proposal Workflow. The CRS’s task is to identify whether the applicable proposal was awarded (“Yes” or “No”).

![Workflow Image](image)

2.4. **Note**: The name of the RA giving the CRS the task will be shown in the task list. Here, the RA’s name is “Lisa Nelsen” (see above).
3. Completing the Proposal Workflow or Sending the Proposal Workflow to the OSP Contract Officer

3.1. If the applicable proposal is **not awarded** (i.e., “No” to the answer above), then the Proposal Workflow will automatically end when the CRS clicks “Finish” at the bottom of the Proposal Workflow.

   ![Finish, Reject, Save buttons](image)

   [Note: See the specific instructions in the Frevvo User Guide regarding the “Reject” and “Save” features.]

3.2. If the applicable proposal is **awarded** (i.e., “Yes” to the answer above), then the CRS will first need to:

   3.2.1. Upload additional information, such as any Advanced Department ID Requests and related e-mail correspondence just before Part II of the Proposal Workflow;
   
   3.2.2. Upload the contract/award and related information in the first unlabeled section (i.e., prior to Section 12); and
   
   3.2.3. Type the Department ID for this award.

![Diagram of Part II: Award Checklist and PI Acceptance](image)
3.3. If the applicable proposal is awarded (i.e., "Yes" to the answer above), then the CRS will next need to kick off Part II of the Proposal Workflow by clicking “Continue” at the bottom of the Proposal Workflow. The OSP Contract Officer will then receive a task to review, draft and/or negotiate the award terms and conditions.

[Note: See the specific instructions in the Frevvo User Guide regarding the “Reject” and “Save” features.]