PRINCIPAL INVESTIGATOR PROPOSAL WORKFLOW PROCESSING

1. Notification E-mail

1.1. Once the Departmental Administrator (“DA”) has completed her/his required actions in the OSP Proposal & Award Acceptance Workflow (the “Proposal Workflow”), the applicable Principal Investigator (“PI”) 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 PI can complete her/his required tasks.

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

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

![Frevvo Dashboard Image]

2.2. The PI will then need to click the ► icon for the task related to the applicable proposal. In this case, the proposal number is 987654321. After several seconds, the Proposal Workflow will be editable.

2.3. The PI will then need to complete the Proposal Workflow in accordance with: (i) the distinct circumstances of the applicable proposal; and (ii) the Frevvo User Guide.

2.4. **Note:** The name of the DA giving the PI the task will be shown in the task list. Here, the “test” DA’s name is “user_OSP_DA name,” but in production, this will be the name of a person.
3. Sending the Proposal Workflow to the Business Manager

3.1. After completing her/his assignments for the applicable proposal, the PI will send the Proposal Workflow to the applicable Business Manager (“BM”) by: (i) electronically signing in the applicable box in the “Signatures” section at the bottom of the Proposal Workflow (see the Frevvo User Guide for instructions); and (ii) clicking “Continue” at the bottom of the Proposal Workflow. It may take several seconds for the Proposal Workflow to transmit after clicking Continue. [IMPORTANT: By clicking “Continue,” the PI indicates her/his acceptance of: (i) the main text of the Proposal Workflow; and (ii) all attachments uploaded into the Proposal Workflow (e.g., F&A waiver forms, cost share forms, third party cost share forms, PI eligibility forms, proposals, internal budgets). The aforementioned forms will not be signed separately.]

[Note: See the specific instructions in the Frevvo User Guide regarding the “Reject” and “Save” features.]
4. Significance of the PI’s Signature

4.1. As set forth in the Proposal Workflow and below, the PI makes a number of certifications when she/he signs the Proposal Workflow and sends it to the BM. If you have questions about these certifications, please contact your appropriate departmental or college personnel for assistance.