COMMENCING THE PROPOSAL WORKFLOW

New Awards & Supplements

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. After logging in using your normal Boise State login information (if applicable), the Proposal Workflow will automatically open.

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

   3.1. At the very beginning of the form, select the correct award type in the “What type of award is this?” drop down box. The options are “New Award,” “Supplement,” “Continuation” and “Other.”

   3.2. 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.]

   3.3. Identify in **Section 1, General Project Information,** whether the award is subject to the Uniform Guidance.

   - Uniform Guidance

3.4. If it’s a Supplement, 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 3.2 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.
3.5. In **Section 1, General Project Information**, type the name of the RA completing this portion of the Proposal Workflow.

3.6. Start typing the Principal Investigator’s ("**PI**") Boise State **username** in **Section 2, Investigator Information**. Next, choose the correct PI’s username from the list that appears.

![Principal Investigator Username](image)

**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 will coordinate with the OSP Pre-Award Manager for assistance.

3.7. Choose the correct College / Division from the drop down box in **Section 2, Investigator Information**.

![College / Division](image)

3.8. Choose the correct Department / Center / Unit from the drop down box in **Section 2, Investigator Information**.

![Department / Center / Unit](image)
3.9. 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.

4. If there are one or more Co-Principal Investigators (“Co-PI”), the RA must (at a minimum) also do all of the following:

4.1. 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.

```
Are there one or more Co-Principal Investigators (Co-PIs)?

☐ Yes  ☐ No
```

4.2. 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.

```
Email
username@boisestate.edu
```

4.3. 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.

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College / Division

Department / Center / Unit
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4.4. 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.

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To add or remove Co-Principal Investigators, use the “+” and “-” buttons to the right. You will need to complete a new expandable / collapsible subsection for each new Co-Principal Investigator.
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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.

5. 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”).

6. 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.

7. 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.

Continuations & Other

1. If you are an OSP Contract Administrator (“CA”), you may commence “Continuations” and “Other” routings in the OSP Proposal & Award Acceptance Workflow (the “Proposal Workflow”) by clicking here.

2. After logging in using your normal Boise State login information (if applicable), the Proposal Workflow will automatically open.

3. **To commence the routing process, the CA must (at a minimum) do all of the following:**

   a. At the very beginning of the form, select the correct award type in the “What type of award is this?” drop down box. The options are “Continuation” and “Other.”

   ![What type of award is this? *](image)

   You can't leave this empty: What type of award is this?

   ![What type of award is this? *](image)

   b. 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.*]
c. If it’s a Supplement, 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 3.2 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.

![Proposal Number (assigned by OSP)](image)

![Mod #](image)

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

e. Start typing the Principal Investigator’s (“PI”) Boise State username in Section 2, Investigator Information. Next, choose the correct PI’s username from the list that appears.

![Principal Investigator Username *](image)

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 will coordinate with the OSP Pre-Award Manager for assistance.

f. Choose the correct College / Division from the drop down box in Section 2, Investigator Information.
g. Choose the correct Department / Center / Unit from the drop down box in Section 2, Investigator Information.

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.

4. To send the Proposal Workflow to the CRS, the CA 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.

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