

**OSP-CFR Workflow Matrix (effective 3/21/22)**  
for Policy & Procedure AO 46 Gifts that Support Projects

Shading Color Key: Blue means 'active' Gold means 'informed'

**Actions:**

**Roles**

	Required Leadtime	Roles			
		Principal Investigator	Dept. Research	CFR Staff	OSP Specialist
<b>Concept Development and Proposal Development</b>					
Secure support of Department Chair		PI			
Limited Submissions process followed by PI and Chair (when applicable)		PI	DRA	CFR	
Provide Dept Research Admin contact to CFR		PI	DRA		
Concept development (early)		PI	DRA	CFR	
Review of RFP or opportunity checklist		PI	DRA	CFR	
Concept and budget early drafts		PI	DRA	CFR	
Share early drafts		PI	DRA	CFR	
Check funder, Department, School, CFR, OSP review deadlines		PI	DRA	CFR	
<b>Limited Submission (if applicable)</b>					
Internal procedures to secure University selection/approval to submit a proposal	Limitation is defined by funder PI may enlist CFR guidance (optional) PI's internal application to OSP's Competition Space Internal deadline a month or more before funder's University process selects the institutional nominee(s) Selected PI follows Proposal Submission procedure	PI		CFR	OSP
		PI		CFR	
		PI	DRA		OSP
		PI			OSP
		PI		CFR	
<b>Proposal Submission</b>					
Begin Funding Proposal (FP) in MyFunding			DRA		OSP
Request IDC waiver (if applicable)	10 business days		DRA		OSP
Request and collect letter of recommendation 10+ days prior	10 business days	PI		CFR	
edit and finalize narrative elements 5+ days prior to deadline	5 business days	PI	DRA	CFR	
edit and align budget for application 5+ days prior to deadline	5 business days	PI	DRA	CFR	
PI certifies finalized application	4 business days	PI	DRA	CFR	
Submit FP for school approval		PI	DRA		
FP due to OSP at least 4 days prior to funder deadline	4 business days	PI	DRA	CFR	OSP
In FP, select "Submitted by Department"			DRA		OSP
	Confirm limited submissions process followed	PI	DRA	CFR	OSP
	Web portal accessed and verified	PI		CFR	OSP
Required OSP compliance review and concurrent steps	Verify budget compliance indirect costs verified or IDC waiver Compliance review of proposed activities Compliance review of external collaborators Terms and conditions review Secure institutional signature endorsements	PI	DRA	CFR	OSP
		PI	DRA	CFR	OSP
		PI	DRA		OSP
		PI	DRA		OSP
		PI	DRA		OSP
	4 business days	PI	DRA	CFR	OSP
FP to Department for submission			DRA		OSP
Gather funder-mandated institutional materials		PI		CFR	
Finalize and submit proposal to funder		PI		CFR	
Sharing confirmation of submission		PI	DRA	CFR	OSP
Sharing funding decision		PI	DRA	CFR	OSP
<b>Award Activation</b>					
Award notification/documentation		PI	DRA	CFR	OSP
Award components entered into MyFunding			DRA		OSP
Compliance review of award terms		PI		CFR	OSP
OSP and PAE provide signatures and award execution		PI		CFR	OSP
MyFunding award activation			DRA		OSP
<b>Post Award Requirements</b>					
Award activated with SPA which assigns account			DRA	CFR	OSP
Modifications during award time period (i.e. No Cost Extension)		PI	DRA	CFR	OSP
Financial reporting and invoicing by SPA in coordination with CFR		PI	DRA	CFR	
Stewardship, mid-term, final reports completed by PI with CFR		PI	DRA	CFR	OSP