

OSP Proposal Review Scheduling System

*Michelle Casias,
Proposals & Research Administration
Systems Manager,
Office of Sponsored Projects*





System Development

- September 2020: OSP partnered with the UNM Institute of Design & Innovation on the app development.
- Developed the Scheduling Application based on:
 - Customer Needs
 - Other Scheduling System Best Practices
 - Reduce Delays During a Review

Why Proposals Need to be Reviewed

- Office of Sponsored Project's (OSP) staff serves as the Authorized Organizational Representative
- UNM Policy 2010, subsection 3.1 Sub-delegations of Authority, Exhibit B1.27 Delegation of Authority
- Two main types of review: Comprehensive Review and Essential Component Review
- All proposals must receive a review prior to submission of a proposals to sponsors and in order to be endorsed by OSP Staff.

Review Types

Comprehensive Review



Essential Component Review

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Both Review Types result in a submission.

The complete matrix can be found at: <https://osp.unm.edu/proposals/index.html>

Home Page

The Office of Sponsored Projects (OSP) strives to accommodate every proposal request received with a comprehensive appointment. However, appointments are scheduled on a first-come, first-served basis. Appointments are scheduled, taking into consideration the deadline date and OSP availability.

- **Deadline Date** – No Comprehensive Component Reviews will be conducted on the sponsor imposed due date.
- **OSP Availability** – Appointments are scheduled on a first-come, first-served basis depending on Proposal Specialists' availability. To ensure that you receive your desired appointment time, please request an appointment as soon as possible.

NOTE: Prior To Scheduling Your Appointment:

Prior to scheduling your appointment, please be prepared to identify any of the following on the appointment request form as required by or included in the solicitation:

- Cost share
- Off Campus F&A rate
- F&A Exception
- Representations and Certifications
- Sample Contract

Identifying these items in advance will help to avoid delay during the proposal review appointment.

See [OSP's website](#) for further details on Exception Request Processes.

**For general scheduling questions please contact ospappointment@unm.edu*

SCHEDULE REVIEW

Select Sponsor

The appointment availability will default to the following:
-2 hours for Non-Federal sponsors
- 4 hours for Federal sponsors

1 Select Sponsor

2Morrow Inc.	^
510nano Inc.	
AAC Microtec Inc	
Abilene Christian University	
ABMRF The Foundation for Alcohol Research	
ABQ i-team	
Abram and Ray Kaplan Foundation	
ABT Associates Inc	
Academic Technology Ventures, Inc. (Delaware c-corporation)	v

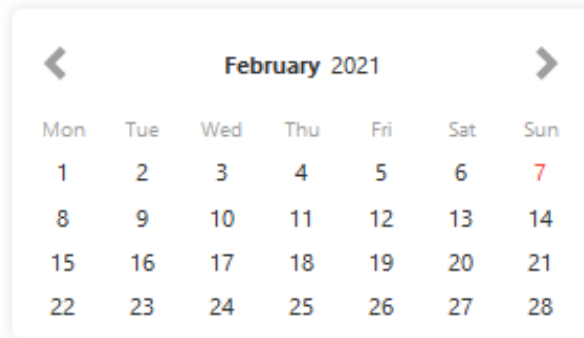
**Please contact OSP at 505-277-4186 or via email at osp@unm.edu if the sponsor is not listed.*

BACK

Sponsor Deadline

2 Project Deadline

*If you are requesting an appointment for a proposal with a soft-deadline, please select a deadline date two-days ahead of the desired review date.



A calendar interface for February 2021. The calendar shows days of the week (Mon-Sun) and dates (1-28). The date 7 is highlighted in red. Navigation arrows are present on the left and right sides of the calendar.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

BACK

Note: always use the back button to go to the previous screen and not the back arrow on the web browser

Selecting the Appointment Time

Current week availability 2/8-2/12

1 Select Sponsor

ABT Associates Inc

2 Project Deadline

Feb 27th 2021

3 Select Appointment Time



Feb 8th - 12th 2021



Mon Feb 8th 2021	Tue Feb 9th 2021	Wed Feb 10th 2021	Thu Feb 11th 2021	Fri Feb 12th 2021
8:00AM		10:00AM	8:00AM	

*If there is no availability please contact OSP at 505-277-4186 or via email at ospappointment@unm.edu

BACK

More appointment options on next slide

Selecting the Appointment Time (cont.)

Availability
during the week
of 2/15-2/19

3 Select Appointment Time



Feb 15th - 19th 2021



Mon Feb 15th 2021	Tue Feb 16th 2021	Wed Feb 17th 2021	Thu Feb 18th 2021	Fri Feb 19th 2021
1:00PM	1:00PM	8:00AM	8:00AM	8:00AM
3:00PM	3:00PM	10:00AM	10:00AM	10:00AM
		1:00PM	1:00PM	1:00PM
		3:00PM	3:00PM	3:00PM

*If there is no availability please contact OSP at 505-277-4186 or via email at ospappointment@unm.edu

BACK

Selecting the Appointment Time (cont.)

Availability during the week of 2/22-2/26, which is the week of the sponsor deadline

3 Select Appointment Time

Feb 22nd - 26th 2021

Mon Feb 22nd 2021	Tue Feb 23rd 2021	Wed Feb 24th 2021	Thu Feb 25th 2021	Fri Feb 26th 2021
8:00AM	1:00PM	8:00AM	8:00AM	8:00AM
10:00AM	3:00PM	10:00AM	10:00AM	10:00AM
1:00PM		1:00PM	1:00PM	1:00PM
3:00PM		3:00PM	3:00PM	3:00PM

*If there is no availability please contact OSP at 505-277-4186 or via email at ospappointment@unm.edu

BACK

Information Screen

3 Select Appointment Time

February 24th 2021 at 1:00PM

4 Information

Non-Federal Sponsor Review

P.I. Contact Information

P.I. First Name

Antoinette

P.I. Last Name

Sabedra

P.I. Phone #

(505) 277-7647

P.I. Email

asabedra@unm.edu

Additional Contacts

Name

Michelle Casias

Phone

Email

mcasiasl@unm.edu



[+ ADD CONTACT](#)

Information Screen (cont.)

This portion of the scheduling system page includes the

- Early Alert Items
- Option to provide additional information

Project Information

Cayuse Number

Please check all boxes that apply to this proposal. Please note that all off campus rates, F&A exception requests and costshare need prior approval in accordance with university policy.

- Cost Share
- Off Campus F&A Rate
- F&A Exception
- Reps and Certs
- Sample Contract
- Fabricated Equipment

Will you be using UNM owned equipment as part of the fabricated equipment? If yes, please provide the Asset Tag Number

Additional Information

BACK

NEXT →



Click next button when done

Confirmation Screen

4 **Confirm**

Non-Federal Sponsor Review

Non-Federal Sponsor Review

📅 Feb 24th 2021

🕒 1:00PM - 3:00PM

P.I. First Name

Antoinette

P.I. Last Name

Sabedra

P.I. Phone

(505) 277-7647

P.I. Email

asabedra@unm.edu

Additional Contacts

Michelle Casias, , mcasias@unm.edu

Cost Share

true

Off Campus F&A Rate

true

F&A Exception

false

Reps and Certs

false

Sample Contract

false

Fabricated Equipment

true

Will you be using UNM owned equipment as part of the fabricated equipment? If yes, please provide the Asset Tag Number

Additional Information

BACK

📅 SCHEDULE



Click schedule button
to schedule
appointment

Appointment Confirmed

- Once you click on the schedule button, you will receive a quick confirmation of the appointment.
- You can also go back to the home page and see your upcoming appointments

Upcoming Appointments

Non-Federal Sponsor Review

📅 February 24th 2021 at 1:00PM

Non-Federal Sponsor Review

PI

Antoinette Sabedra

CANCEL



In the event you need to cancel the appointment, click “Cancel”

Email Confirmation



Sun 2/7/2021 1:13 PM

OSP Appointment

OSP Non-Federal Sponsor Review | Review Confirmation | 21-1234

To Antoinette Sabedra

If there are problems with how this message is displayed, click here to view it in a web browser.



Your Appointment Has Been Confirmed

Review
Non-Federal Sponsor Review

Date & Time
Wednesday, February 24 at 1:00 PM (Mountain Time)

Reviewer
Timothy Wester

Cayuse #
21-1234

[VIEW / EDIT APPOINTMENT](#)

Thank you for scheduling your Comprehensive Proposal Review and submission appointment to be conducted [via email](#).

Please do the following by the scheduled appointment time:

- Route, certify and approve the Cayuse record (includes all applicable parties)
- Upload all **complete** proposal materials, per solicitation guidelines, into Cayuse and/or the sponsor portal (if applicable) which may include:
 - Budget
 - Budget justification
 - All technical & supplemental pieces as required by solicitation
 - Grant AOR access within sponsor submission portal (if required).
- Provide your current contact information to your Proposal Specialist.

****You may edit any documents up until the start of the scheduled appointment time.**

You and/or your designated representative should be available during the **last hour** of the appointment for revisions, if deemed necessary (see highlighted time above). You should be prepared to submit the proposal by the end of the appointment window.

During this appointment time your Proposal Specialist will review your **complete** proposal and may make communicated collaborative revisions to proposal materials, as necessary, per established guidelines, policies, procedures, cost principles, audit requirements, regulations and/or law.

If you have any questions, or need help prior to your scheduled appointment, please feel free to contact your Proposal Specialist.

We look forward to working with you.

Kind regards,

University of New Mexico
Office of Sponsored Projects
osp@unm.edu

Things to Note

- You cannot schedule essential reviews via this system, you must send a request for an essential review to OSPAppointment@unm.edu and include the following information
 - PI Name and contact information (email and phone)
 - Cayuse record number
 - Solicitation
 - Sponsor deadline
- If you need to reschedule your appointment, please send an email to your proposal specialist so they can assist you.

Road Ahead

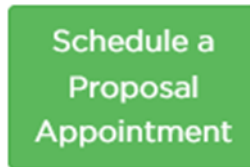


- Live beta-testing February 1-26, 2021
- Thanks to the beta-testers, we are identifying and addressing bugs and system enhancements.

Road Ahead

We plan to Go Live on March 1, 2021!

- The link to the app will be available on our website. You will just need to select the green button found on the right side of our home page.



Keep your eye out for updates sent to the RAN Listserv

QUESTIONS??



**Thank you for
attending!**

