OSP Proposal Review
Scheduling System

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Proposals & Research Administration
Systems Manager,
Office of Sponsored Projects
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.
Both Review Types result in a submission. The complete matrix can be found at: https://osp.unm.edu/proposals/index.html
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*
Select Sponsor

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

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

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

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

More appointment options on next slide
### Selecting the Appointment Time (cont.)

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

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<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
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*If there is no availability please contact OSP at 505-277-4186 or via email at ospappointment@unm.edu*
Selecting the Appointment Time (cont.)

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

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

February 24th 2021 at 1:00PM

Information

Non-Federal Sponsor Review

P.I. Contact Information

P.I. First Name: Antoinette
P.I. Last Name: Sabedra
P.I. Phone #: (505) 277-7547
P.I. Email: asabedra@unm.edu

Additional Contacts

Name: Michelle Casias
Phone: 
Email: mcasias@unm.edu

© ADD CONTACT
This portion of the scheduling system page includes the
• Early Alert Items
• Option to provide additional information
Confirmation Screen

Non-Federal Sponsor Review

Non-Federal Sponsor Review

Feb 24th 2021 1:00PM – 3:00PM

P.I. First Name
Antoinette

P.I. Last Name
Sabela

P.I. Phone
(505) 277-7647

Additional Contacts
Michelle Casias, mcasias1@unm.edu

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

<table>
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<tr>
<th>Non-Federal Sponsor Review</th>
<th>February 24th 2021 at 1:00PM</th>
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<tbody>
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<td>Non-Federal Sponsor Review</td>
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<tr>
<td>PI</td>
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<tr>
<td>Antoinette S Abedra</td>
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In the event you need to cancel the appointment, click "Cancel"
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
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!