








	OSP Action Type	Request System	Record Type	OSP Review Appt	Required Documents	Additional Resources
Proposal	<b>Letter of Intent - Pre-proposal - White Paper</b> <b>NOTE:</b> If a budget is required a PD record is required for this review and submission		QP	✓	Solicitation, Scope of Work (technical narrative)	<a href="#">OSP Proposal Review</a>
	<b>Solicited Proposal</b> (or pre-proposal; LOI that requires a budget to be submitted as part of the proposal package)		PD	✓	Solicitation, Scope of Work (technical narrative), Budget spreadsheet, Budget Justification, any additional documents required by the sponsor guidance	<a href="#">OSP Proposal Review</a>
	<b>Task Orders</b> under a Master Agreement		PD	✓	Statement of Work, Budget spreadsheet, Budget Justification, a reference to the Master Agreement, and additional documents or correspondence, as applicable	<a href="#">Defining the Opportunity &amp; OSP Process</a>
	<b>Supplemental Requests</b> Increase funding to award, Add new/revise Scope of Work (SOW): <b>NOTE:</b> sponsor will require documents to be returned to them		PD	✓	Correspondence from sponsor that allows the additional funding (should also include whether sponsor wants documents returned to them), Budget spreadsheet, Budget Justification, Scope of Work, as applicable	<a href="#">OSP Proposal Review</a>
	<b>Unsolicited Funded Contracts</b>		PD	✓	Draft Agreement, Budget spreadsheet, Budget Justification, Statement of Work, additional documents or correspondence, as applicable	<a href="#">Defining the Opportunity &amp; OSP Process</a>
Pre-award Requests	<b>Post-proposal Submission Modifications</b> (includes <b>JITs and sponsor requests</b> )	Email the sponsor's request to the OSP Sponsored Project Officer who submitted the proposal or send to <a href="mailto:OSPappointment@unm.edu">OSPappointment@unm.edu</a> .	N/A	N/A	Instructions on the modification requested and any attachments received from the sponsor	
	Request to <b>Spend Funds</b>	Email the RTSF form to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a>	N/A	N/A	Completed <i>Request to Spend Funds form</i>	See RTSF form for general process information
Contract	<b>Unfunded Agreement</b>		QP	N/A	Draft agreement, additional documents, or correspondence, as applicable	<a href="#">OSP Contract Templates</a>
Award Set Up & Management	<b>New Award Set Up</b>	Email new award to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a> , referencing the Institution Streamlyne IP #.	IP	N/A	Award documentation	
	<b>Budget Revisions</b> ( <i>internal</i> )	Complete the Internal Budget Revision Request – Smartsheet Form and click submit to send form to CGA	N/A	N/A	Complete the <a href="#">IBR Request Smartsheet Form</a>	
	<b>Carry Forward Requests</b>	Email the request to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a>	N/A	N/A	Justification for request, new budget, and available balance	
	<b>Continuations &amp; Supplemental Funds</b> (when the sponsor does not require documents returned to them)	Email attachment of documentation from sponsor that approves the modification awarding continuation or supplemental funds to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a> .	N/A	N/A	Formal award document(s) from sponsor awarding the additional funds	
	<b>Changes - includes PI, Administrative and Other</b> (new reporting obligations)	Email attachment of documentation from sponsor that details the administrative changes to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a> .	N/A	N/A	Justification for request and if Key or Senior personnel changes, request must include biosketch/s or CV/s	
	<b>De-obligation</b> - includes ongoing awards and closeout	Email attachment of documentation from sponsor that details de-obligation to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a> .	N/A	N/A	Formal award documentation that comes directly from the sponsor or their portal, <a href="#">IBR Form (Internal Budget Review)</a> <i>NOTE: IBR only required for ongoing award</i>	
	<b>No Cost Extension</b> ( <i>requiring sponsor approval</i> )	Respond to <i>90-day Workflow</i> (closeout) (if applicable) - send email request to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a>	N/A	N/A	NSF requests should be initiated by PI in Research.gov All other sponsors: send request to <a href="mailto:awards@unm.edu">awards@unm.edu</a>	
	<b>Stop Work Orders</b>	Email attachment of documentation from sponsor that details the stop work order to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a>	N/A	N/A	Formal award documentation that comes directly from the sponsor or their portal	
	<b>PI transfers</b>	Email request to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a>	N/A	N/A	Relinquishment Form & Award Transfer Notice (ATN)	<a href="#">Transfer of Awards from UNM to Another Institution</a>
Progress Reporting*	<b>Reports requiring endorsement</b> by signing Official or Authorized Organization Representative (AOR)**	Complete report in sponsor-specified portal and email to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a> at least <b>1 week</b> prior to the deadline.	N/A	N/A	Completed report routed through the sponsor portal or provided in format that allows for signatures on the coversheet	
Miscellaneous†	<b>Direct Government Appropriations &amp; Gifts</b>	Does <b>not</b> go through OSP.	N/A	N/A	Contact <a href="#">UNM Foundation, Government &amp; Community Relations</a>	
Subaward Administration	<b>New Subaward</b> <i>Sub-recipient/s documented on the original proposal</i>	As new awards are being set up, OSP will start the process of reviewing & issuing an agreement to the subrecipient/s. OSP will contact the PI and Dept if anything is needed to complete the process.	N/A	N/A	OSP will request a completed <i>3B Form</i> for each sub-recipient and, as applicable, an updated Budget, Budget Justification, and Scope of Work These need to be returned to the Award Staff Member in a timely fashion to initiate the setup of New Subawards.	
	<b>New Subawardee (sub-recipient)</b> <i>Not listed on original award</i>	  QP Type: <i>Subaward New &amp; Mods</i>	QP	N/A	Budget spreadsheet, Budget Justification, Scope of Work, Letter of Commitment, and applicable rate agreement  <i>OSP: Subaward Vs Vendor Determination. If a Subaward relationship is determined, OSP will also request Prior Approval from the sponsor.</i>	<a href="#">Subrecipient/Subaward vs. Consultant/Vendor</a>
	<b>Subaward Modification</b> <i>Amendments that formally make changes to the original subaward agreement.</i>	Initiate a <a href="#">Subaward Request Form</a>	N/A	N/A	Follow the prompts in the <i>Subaward Request Form</i> based on the type of modification you are requesting.	<a href="#">Subaward Request Form</a>

**LEGEND – STREAMLYNE (SL) PROPOSAL TEMPLATES**  
**PD – Proposal Development:** Select Main Menu > Pre-Award > Proposal Development > Create New | Select Template > All Proposals  
**QP – Quick Proposal:** Select Main Menu > Pre-Award > Quick Proposal  
**IP – Institutional Proposal (submitted proposals):** Access on SL dashboard, or search Main Menu > Pre-Award > Institutional Proposal

**NOTES**  
\* **Progress Report:** Periodic, scheduled reports required by the sponsor summarizing research progress to date (including technical, fiscal, and invention reports).  
\*\* **Authorized Organization Representative (AOR) or Signatory Authority (SO):** the individual authorized to sign on behalf of the proposing organization and is authorized to act on behalf of the applicant and to assume the obligations imposed by laws, regulations, requirements, and conditions that apply to grant applications or grant awards.  
➤ For questions about sponsors or Action Types not described in this table, contact [osp.unm.edu](mailto:osp.unm.edu).



Award Modifications

