UTRMS Grants – How to Assign Specialist to a Proposal

When PIs/Department Administrative Contacts submit proposals in Grants, the proposal records will be in the Department Review state and assigned to Elena Mota as default reviewer (Specialist). The OSP Operations Team will monitor the workspace for these records to “Approve” the department review. The Operations Team will either reassign records to the appropriate OSP Proposal Specialist or to Rachel Ginsberg if the proposals require OIE review.

The following steps will be completed by the Operations Team but can be completed by any Proposal Analyst, OSP, or OIE user to expedite routing if/when necessary.

1. Navigate to the Dashboard using the menu bar (located at the very top of the workspace) then refer to the My Inbox tab.

2. Search for proposals by filtering for records in Department Review: select State in the filter dropdown, enter “department review” in text field, and click Search (magnifying class icon).

3. Click the project title link in the Name column to go the proposal’s workspace.
4. On the workspace, click **Review Funding Proposal** to determine if proposal should be reviewed by OSP or OIE.

   ![Image of Review Funding Proposal button]

   - To determine if **Rachel Ginsberg/OIE** should be assigned to the record:
     a. Review **General Proposal Information** SmartForm page:
        i. Assign to OIE only if **all of the following** hold true:
           1. **5 or 5a**: The direct sponsor is a for-profit organization (i.e. industry)
           2. **5b**: The prime sponsor is blank or a for-profit organization (i.e. NOT: foundation, federal, non-profit)
           3. **7**: Primary purpose does not reference “Clinical Research”

   ![Image of General Proposal Information SmartForm]

5. **Select the direct sponsor:**
   - National Institutes of Health (NIH)
     a. If the direct sponsor is not listed, type their name here:
     b. If this will be a flow-through, select prime sponsor:

6. **Instrument type:**
   - Grant

7. **Primary purpose of this project:**
   - Research
5. Click **Exit** to return to the proposal workspace.

6. Click **Assign Specialist** in the left-hand menu of the workspace.

7. Select the radio button for the appropriate specialist:

   a. If you determined in step 4 that the proposal needs **OIE** review, assign Rachel Ginsberg.

   b. Otherwise, assign to the appropriate **OSP Proposal Analyst** using the constituency list.

8. Click **OK**.

9. On the proposal workspace, click **Approve**:
10. Click OK on the pop-up window.

The proposal is now in Specialist Review state and the selected Proposal Analyst is listed as Reviewer (Specialist) in the proposal record. They may access the proposal through the Grants tab or the Dashboard in the UTRMS My Inbox.

If a proposal was routed to OIE in error:
- Use the Assign Specialist button on the workspace to re-assign to the appropriate OSP Proposal Analyst from the constituency list.
- Email the Proposal Analyst with the subject line “OIE to OSP: Assignment”