












	OSP Action Type	Request System	Record Type	OSP Review Appt	Required Documents	Additional Resources
Proposal	Letter of Intent - Pre-proposal - White Paper		QP	✓	Solicitation, Scope of Work (technical narrative)	<a href="#">OSP Proposal Review</a>
	Solicited Proposal		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> <a href="#">Guide to Submitting Solicited Proposals</a>
	Task Orders 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>
	Supplemental Requests Increase budget amount, Add new/revise Scope of Work (SOW)		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>
	Unsolicited Funded Contracts		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	Post-proposal Submission Sponsor Request (includes JITs)	Email the sponsor's request to the OSP Sponsored Project Officer who submitted the proposal.	N/A	N/A	Instructions on the modification requested and any attachments received from the sponsor	<a href="#">OSP Contract Templates</a>
	Request to Spend Funds		QP	✗	Complete and attach <a href="#">Request to Spend Funds</a>	See <a href="#">RTSF form for general process information</a>
Contract	Unfunded Agreement		QP	✗	Draft agreement, additional documents, or correspondence, as applicable	<a href="#">OSP Contract Templates</a>
Award Set Up & Management	New Award Set Up	Email new award to <a href="mailto:Awards@unm.edu">Awards@unm.edu</a> , referencing the Institution IPSL #.	IP	N/A	Award documentation	
	Budget Revisions (internal)	Email completed IBR form to <a href="mailto:Indexcga@unm.edu">Indexcga@unm.edu</a> .	N/A	N/A	<a href="#">IBR Form (Internal Budget Review)</a> . (Depending on the award terms & conditions, prior sponsor approval may be required to process the IBR)	<a href="#">Budget Revision Form</a>
	Carry Forward Requests	 QP Type: <i>Award Administrative Change</i>	QP	✗	Justification for request, new budget, and available balance	
	Continuations & Supplemental Funds	Email attachment of documentation from sponsor that approves modification awarding continuation or supplemental funds 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	
	Contact Changes	 QP Type: <i>Award Administrative Change</i>	QP	✗	Justification for request and if Key or Senior personnel changes, request must include biosketch/s or CV/s	
	De-obligation & Stop Work Orders	Email attachment of documentation from sponsor that details de-obligation or 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, <a href="#">IBR Form (Internal Budget Review)</a>	
	No Cost Extension (requiring sponsor approval)	Respond to <i>90-day Grant Workflow</i> (closeout) message. If no GW record, send request through Streamlyne & use record QP Type: <i>Award Administrative Change</i> .	QP	✗	Justification for request, new end date, and available balance	
	Other Admin Changes (including 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	✗	Modification from the sponsor	
Progress Reporting*	PI transfers	 QP Type: <i>Award Administrative Change</i>	QP	✗	Relinquishment Form & Award Transfer Notice (ATN)	<a href="#">Transfer of Awards from UNM to Another Institution</a>
	Reports requiring endorsement 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 1 week 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†	Direct Government Appropriations & Gifts	Does not go through OSP.	N/A	N/A	Contact <a href="#">UNM Foundation, Government &amp; Community Relations</a>	
Subaward Administration	New Subaward <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	The Sponsored Project Officer setting up the new award 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 Sponsored Project Officer in a timely fashion to initiate the setup of New Subawards.	
	New Subawardee (sub-recipient) <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  OSP: <b>Subaward Vs Vendor Determination.</b> If a Subaward relationship is determined, OSP will also request Prior Approval from the sponsor.	<a href="#">Subrecipient/Subaward vs. Consultant/Vendor</a>
	Subaward Modification <i>Amendments that formally make changes to the original subaward agreement.</i>	Initiate a Subaward Request Form	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):** 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 Modification

