Proposal Processing
Desk Procedures
DRAFT
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Overview

This document will walk the user through all of the sub-processes that are associated with the Proposal Processing Business Process

Receipt of Proposal in the SPA Office
GA Review Process
Institutional Approval Process
Proposal Submission Process
Interface Proposal from PRF/EGMS
Proposal Termination Process

These processes will be a combination of People Soft entries and updates, updates to and interfaces from EGMS, and manual routing of physical files.

Roles and Responsibilities Applicable to Business Process

Receipt of Proposal in the SPA Office – SPA Front Desk/SPA Support Staff
GA Review Process – SPA Grant Administrator
Institutional Approval Process - SPA Grant Administrator
Proposal Submission Process - SPA Grant Administrator
Interface Proposal from PRF/EGMS – SPA Grant Administrator
Proposal Termination Process – SPA Grant Administrator

Financial Policies and Procedures

TBD
Receipt of Proposal in the SPA Office

Departments create proposals in EGMS, on paper, or both. Once the proposal is approved in the department, the proposal must be routed to Sponsored Projects Administration (SPA) for review, institutional approval and, ultimately, submission to the sponsor.

Roles Applicable to this Process

- SPA Support Staff

Manual Creation of Proposal

Detailed description:

1. The proposal is received in SPA.
2. Support staff will search to see if proposal exists in PeopleSoft.
3. If proposal already exists in PeopleSoft, it will be routed to the Grant Administrator for review.
4. If proposal does not exist, staff will check to see if sponsor is set up in PeopleSoft.
5. Proposal record will be created manually in PeopleSoft.
Navigation: Grants > Proposals > Maintain Proposal

Use the Maintain Proposal Search Page to search for existing Proposal

Maintain Proposal Search Page

1. For Business Unit, enter or select from the lookup menu **UMSPR**
2. Use any desired search field(s) to locate proposal

Navigation: Customers > Customer Information > General Information

Sponsor Search Page

3. For Business Unit, enter or select from the lookup menu **UMFIN**.
4. Use any desired search field(s) to locate sponsor.
5. If sponsor exists, make sure Grants Management Sponsor box is checked.
6. If sponsor does not exist, request new sponsor setup via Customer Maintenance.

Navigation: Grants > Proposals > Maintain Proposal
1. In the Business Unit field enter “UMSPR”
2. For Proposal ID, allow the system to “NEXT” number
3. For Version ID use V101 (should default)
4. Click the “Add” pushbutton
Detailed description: Spa Support Staff will enter a “bare bones” version of the proposal in PeopleSoft. The first step to this is the header information, which is described below:

**Field Values and Descriptions for the Maintain Proposal Page – Proposal Tab**

<table>
<thead>
<tr>
<th>Field</th>
<th>Values Entered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version ID</td>
<td>V101 or A101</td>
<td>Displays the proposal version, which enables tracking of changes to a proposal.</td>
</tr>
<tr>
<td>Description</td>
<td>Dependent on Proposal</td>
<td>If you leave this field blank, the entry in the Title field appears by default. The system uses this title in the award generation process to name the award.</td>
</tr>
<tr>
<td>Title</td>
<td>Dependent on Proposal</td>
<td>Proposal title may use the title as an alternate search option on the Search page to access the Proposal page.</td>
</tr>
<tr>
<td>PI ID</td>
<td>Dependent on Proposal</td>
<td>The principal investigator’s ID.</td>
</tr>
<tr>
<td>Sponsor ID</td>
<td>Dependent on Proposal</td>
<td>The grant sponsor’s ID.</td>
</tr>
<tr>
<td>Proposal Type</td>
<td>Dependent on Proposal Type</td>
<td>The type of proposal may be new, renewal, revision, supplemental, non-competing continuation, pre-proposal or a combination of values.</td>
</tr>
<tr>
<td>---------------</td>
<td>----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Start Date</td>
<td>MM/DD/YYYY</td>
<td>Enter the start date of the proposed project</td>
</tr>
<tr>
<td>End Date</td>
<td>MM/DD/YYYY</td>
<td>End date of the proposed project</td>
</tr>
<tr>
<td>No. Periods</td>
<td>1</td>
<td>Click Build Periods  The standard will be to enter 1 Period, and the correct dates and correct periods will automatically update from the PRF Interface</td>
</tr>
</tbody>
</table>

1. After all the values have been entered, click on the projects tab

2. Enter the Department ID (DeptID) for the project and click yes when prompted about updating the Institution and Subdivision.
3. After all values have been entered, click the “Save” pushbutton.
Due By

Detailed Description: Information must now be entered regarding the deadline for proposal submission as directed by the sponsor.
1. Go back to the Proposal tab.
2. Select the due by hyperlink in the center of the page.

Field Values and Descriptions for the Due By Page

<table>
<thead>
<tr>
<th>Field</th>
<th>Values Entered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due By</td>
<td>Postmark or Receipt</td>
<td>Method by which a sponsor considers a proposal officially submitted</td>
</tr>
<tr>
<td>Due Date</td>
<td>MM/DD/YYYY</td>
<td>Date on which the proposal must be submitted to the sponsor for consideration</td>
</tr>
<tr>
<td>Due Time</td>
<td>HH:MM AM/PM</td>
<td>Time by which the proposal must be either postmarked or received</td>
</tr>
<tr>
<td>Due Time Zone</td>
<td>XXX or Alaska/Hawaii</td>
<td>Time zone in which the Due Time applies</td>
</tr>
</tbody>
</table>

3. After all the values have been entered, click the “OK” pushbutton
Additional Information

Detailed Description: This page can be used to enter information relating to a number of aspects of the proposal process. Support Staff will use this page to enter the PRF number. Also in the case of a modification Proposal the previous award additional information will also be added.

1. From the Maintain Proposal page, Proposal Tab, select the Additional Information hyperlink in the center of the page

Field Values and Descriptions for the Additional Information Page

<table>
<thead>
<tr>
<th>Field</th>
<th>Values Entered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>PRF#</td>
<td>This is a selected value from the drop down menu used to indicate the nature of the information to be entered in comments. There are several options, however, at this time all that will be entered is the PRF number.</td>
</tr>
<tr>
<td>Comments</td>
<td>alphanumeric</td>
<td>In this space, SPA support staff will be entering the PRF number associated with the proposal.</td>
</tr>
</tbody>
</table>

2. In the case that the proposal is for a modification, click the (+) sign to add another additional information record. See below
Field Values and Descriptions for the Additional Information Page

<table>
<thead>
<tr>
<th>Field</th>
<th>Values Entered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Previous Award</td>
<td>This is a selected value from the drop down menu used to indicate the nature of the information to be entered in comments. In the case of a proposal created for a modification use the Previous Award Type to identify the previous award.</td>
</tr>
<tr>
<td>Additional Details Icon</td>
<td>Enter Previous Award detail</td>
<td>This icon will open the Additional Details page for Previous Award. Enter the Previous Award number.</td>
</tr>
</tbody>
</table>

3. Click on the “Additional Details” icon to enter details for previous award.
4. After all the values have been entered, click the “OK” pushbutton.
Status Change

Detailed Description: A proposal undergoes numerous status changes before terminating or becoming an award. This field will be used to provide a very specific description of the status of the proposal as it is processed through SPA.

1. At the Maintain Proposal page, Proposal Tab, click on the Proposal Status dropdown menu

2. Select the appropriate value from the dropdown, based on how the proposal was received. Values used by support staff at this point in the process are:
   2 PropA Paper Received
   2 PropB Elect Received
   2 PropC PaperElect Received
Proposal Summary Report

Detailed Description: The proposal Summary Report is a cover sheet for a proposal as it is routed through SPA. It is a snapshot of selected values for that proposal.

Navigation: Grants > Interactive Reports > UM Proposal and Award Tracking

1. Click Add new value

2. Add a Run Control ID and click the Add button
3. Report Options: Select Proposal Summary

4. Choose Proposal from lookup or enter Proposal ID

5. Click Run
6. Server Name: Select PSUNIX from drop-down menu

7. Select: Select both types of report (XML and App Engine)

8. Type: Select Web from drop-down menu

9. Format: Select PDF from drop-down menu

10. Click OK
Click the Process Monitor hyperlink

Once the report Run Status is Success, navigate to the report manager to retrieve the PDF file.
Navigation: Reporting Tools > Report Manager

<table>
<thead>
<tr>
<th>Report</th>
<th>Report Description</th>
<th>Folder Name</th>
<th>Completion Date Time</th>
<th>Report ID</th>
<th>Process Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMFG017</td>
<td>PROPOSAL &amp; AWARD TRACKING RPTS.</td>
<td>General</td>
<td>02/29/08 12:18PM</td>
<td>26341</td>
<td>31757</td>
</tr>
<tr>
<td>UMFG017</td>
<td>UM PROPOSAL AND AWARD TRACKING</td>
<td>General</td>
<td>02/29/08 12:18PM</td>
<td>26342</td>
<td>31758</td>
</tr>
</tbody>
</table>

Click on the hyperlink of the XML report (the report with RPTS description at the end)

Click on the hyperlink with the PDF extension to view your report.

C:\DOCUME~1\genox003\LOCALS~1\Temp\Proposals Processing Desk Procedures.doc
UNIVERSITY OF MINNESOTA
Proposal Summary

Grant Administrator: Hermanathan
Dept Contact: Goro, Jais
PRF #: 576927
EDMS Proposal #: 210307
Proposal #/Version: 134589/4101
Sponsor #:
Proposal Type: No Cost Extension
Previous Award: OH0000000000000
Purpose: Research
Title: Electrical Properties of the Skull
Principal Investigator: He, Bin
Principal PI #: 900000000000000

Budget Summary

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Costs</td>
<td>$375,000</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>$125,000</td>
</tr>
<tr>
<td>Total Costs</td>
<td>$500,000</td>
</tr>
</tbody>
</table>

Sponsor

Submission Information

Doc Date: 12/31/2007
Submission Method: By Mail and Electronically

Mailing Address:
4110 Executive Boulevard
Room 306A
Bethesda, MD 20892-0322

Comments/Corrections

REPA: □ verified □ email sent for □ not applicable
RSE: □ verified □ pending □ email sent □ not applicable
UCC: □ verified □ pending □ email sent □ not applicable
URC: □ verified □ pending □ email sent □ not applicable
F&A Rate: □ at full or agency limit □ waiver on file □ waiver requested
Cost share document sent? □ yes □ no □ not applicable
UR sharing? □ yes □ no
Proposal Worktable

**Detailed Description:** The Proposal worktable is the physical space where a proposal is placed by SPA Support Staff. The proposal remains here until the GA picks it up to self assign, which is the first step in the review process.

---

**GA Review Process**

The proposal and the PRF undergo a thorough review for completeness and accuracy by the GA. The review process will be recorded and tracked by using status changes and Negotiate Award notes.

---

**Roles Applicable to this Process**

- SPA Grant Administrator
GA Self Assignment

Detailed Description: The GA will retrieve the proposal from the proposal workbench, and then will need to assign it to him/herself in PeopleSoft.

Navigation: Grants > Proposals > Maintain Proposal

Maintain Proposal Page, Projects Tab

1. In the Proposal Projects section, using the Dept Contact lookup icon, GA selects self.
2. Click the “Save” pushbutton.

Update Proposal Status

Detailed Description: For ease of tracking, anyone who has the ability to log into PeopleSoft grants will be able to view the status of a proposal during the GA review process. To make this useful, the GA will need to continually update the proposal status as it remains under review.

Navigation: Grants > Proposals > Maintain Proposal
1. In the dropdown menu, select the appropriate status for the proposal (GA Processing).

Proposal Status Values:

<table>
<thead>
<tr>
<th>Value</th>
<th>Long Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DRF</td>
<td>1 Draft</td>
<td>Default value when a proposal is created.</td>
</tr>
<tr>
<td>SUBM</td>
<td>1 Submitted</td>
<td>Proposal has been submitted to sponsor. This value is changed automatically</td>
</tr>
<tr>
<td></td>
<td></td>
<td>when a proposal status is changed to submitted either through the PRF</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Interface, or through the Submit Proposal page.</td>
</tr>
<tr>
<td>PRA</td>
<td>2 PropA Paper</td>
<td>Paper proposal received in SPA</td>
</tr>
<tr>
<td>PRB</td>
<td>2 PropB Elect</td>
<td>Proposal was received electronically in SPA</td>
</tr>
</tbody>
</table>
The proposal was received part electronically and part on paper.

An incomplete proposal was received in the SPA office.

The GA has self assigned the proposal and it is currently under review.

The GA has approved the proposal and it is currently being routed for institutional approval.

**Update GA Review Notes**

**Detailed Description:** The Negotiate Award page provides a place for the GA to record information regarding the review of the proposal. It is also possible to include contact information for anyone involved during the review process. This page is found in the awards section of the grants module but is searchable by proposal number.

**Navigation:** Grants > Awards > Negotiate Award

<table>
<thead>
<tr>
<th>Field</th>
<th>Values Entered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sequence</td>
<td>Numerical – maximum 3 digits</td>
<td>Enables GA to make multiple entries each day and to track history</td>
</tr>
<tr>
<td>Event Date</td>
<td>MM/DD/YYYY</td>
<td>Date notes were entered by GA</td>
</tr>
<tr>
<td>Negotiation Type</td>
<td>Value selected from dropdown menu</td>
<td>Negotiate award notes can be entered during both award and proposal processing. Values most applicable for proposal processing are: GA Review Note, Dept Request Info, Sent to Files, Withdrawal Process, Withdrawal to Files.</td>
</tr>
</tbody>
</table>
### Negotiate Status

<table>
<thead>
<tr>
<th>Negotiate Status</th>
<th>Completed Negotiation or Working Negotiation</th>
<th>Indicates status of negotiation process – whether or not the negotiation is complete.</th>
</tr>
</thead>
</table>

### Comments

<table>
<thead>
<tr>
<th>Comments</th>
<th>Alphanumeric</th>
<th>Provides a place to enter any pertinent information regarding the negotiation.</th>
</tr>
</thead>
</table>

### Details

| Details | Name | Allows GA to enter contact information for the person(s) involved with the negotiation, description of values is self-explanatory. |
|---------|------|---------------------------------------------------------------------------------------------------------------------------------
|         | Title|                                                                                                                                    |
|         | Telephone|                                                                                                                                   |
|         | Fax   |                                                                                                                                    |
|         | Email ID|                                                                                                                                   |

### Update EGMS Proposal

**Detailed Description:** At this point in the process it may be necessary to make changes to EGMS. When this is the case, the GA can request that the department unfreeze the proposal in EGMS, make the necessary changes, then refreeze the proposal.
Approve Proposal and PRF

**Detailed Description:** When everything on the proposal is finalized, the GA will approve both the PRF and the proposal to prepare for the institutional approval process. The PRF approval will occur in EGMS. The Proposal Approval occurs by changing the proposal status in PeopleSoft.

**Navigation:** Grants > Proposals > Maintain Proposal

1. After selecting the proposal status of Pending Approval, click the “Save” pushbutton.

Route Proposal for Institutional Approval

**Detailed Description:** Once the GA has approved the proposal and PRF, the file needs to be physically routed to the support staff desk to begin the institutional approval process.
Institutional Approval Process

The physical proposal will be placed in a designated area pending approval. Proposals will be organized by due date and submission type (electronic or mail). The proposals will be reviewed, then signed or electronically approved, whichever is applicable.

Roles Applicable to this Process

- SPA Support Staff
- SPA Institutional Approver

Prepare Physical File and Route for Signature

Detailed Description: The physical proposal will be placed in a designated area pending approval. Proposals will be organized by due date and submission type (electronic or mail). The institutional approver will either electronically approve the proposal or will manually sign the proposal. This entire sub process will occur outside of PeopleSoft.

Proposal Submission Process
The submission process involves the actual mailing or electronic transmission of a proposal to the sponsor. In addition, the status will be updated, and the physical file will be placed in the designated area for submitted proposals.

Roles Applicable to this Process

- SPA Grant Administrator
Update Proposal Status

Detailed Description: The proposal status in PeopleSoft will be changed to “Institutionally Approved”

Navigation: Grants > Proposals > Maintain Proposal

1. In the proposal status field, select 2PropG Institution Approved from the dropdown menu.
2. Click the “Save” pushbutton.
Paper Submission

**Detailed Description:** Proposals that need to be submitted by hardcopy will be mailed or faxed to the sponsor at the appropriate address, by the recorded deadline.

Electronic Submission

**Detailed Description:** Proposals that must be submitted electronically will be transmitted to the appropriate destination on time. An example of an electronic submission destination is Grants.gov.

Update Proposal Status

**Detailed Description:** The proposal will need to physically be routed to files for processing following submission. As that occurs, the status will need to be updated in PeopleSoft.

**Navigation:** Grants > Awards > Negotiate Award

1. Select 1PropC Sent to Files in the Negotiation Type drop down menu.
2. Click the “Save” pushbutton.
Interface Proposal from PRF/EGMS

All PRF’s that are submitted to the sponsor will be interfaced to People Soft. The EGMS data will load into People Soft as part of a nightly batch process. The amount and type of data that interfaces will be determined by the origination method of the proposal, either manual or electronic. Manual proposals will consist of the PRF data. Electronic proposals are entered into the EGMS Proposal Prep Application Tool (PP2), and will include more data than manually created proposals. The interface data will update the V version of the proposal that was manually created by SPA and will automatically change the status to Submitted.

Roles Applicable to this Process

- SPA Support Staff
- SPA Grant Administrator

Update PRF Status

Detailed Description: Updating the PRF status triggers the PRF interface. A PRF status of “A” or “N” indicates that the proposal is ready for transmission into People Soft.

Interface Process Runs via PRF Status Change

PRF Only Proposal Update: A proposal that was manually created will interface with People Soft using stand-alone PRF Data. That data includes: Sponsor, Title, PI, Purpose, Proposal Type, CFDA Number, Yes or No indication of Facilities and Admin, Start Date, End Date, Due By, Budget Express and some Additional Information.

PP2 (fully electronic) Update: Proposals that were created electronically in EGMS contain Proposal Prep Application Tool data. In addition to information included on the PRF, PP2 data also includes basic demographic information, work scope, and budgets.
The PI will not interface from the PRF/PP2. Information that is entered in this field in PeopleSoft will take precedence over EGMS. Co-PI and other professional data will interface and will appear on the resources page. Conversely, budget dates from EGMS will take precedence over budget dates in PeopleSoft. If the dates differ, EGMS will overwrite the information in PeopleSoft. This is why only one budget period is entered during proposal creation. EGMS can add periods to existing data in PeopleSoft, but if more periods are entered in PeopleSoft than in EGMS, the excess budget periods will not be automatically deleted from the Maintain Proposals page.

Interface Error Handling

Detailed Description: Any errors detected by People Soft during the PRF interface will be routed to a GA user group via email. Errors will be investigated and resolved, possibly with the assistance of EGMS technical support. Once corrected, data will be re-processed by the nightly interface.

Proposal Termination Process

A certain percentage of proposals will be terminated for any number of reasons. Most situations involve a formal notification process that occurs outside of PeopleSoft. It is also necessary to update the status in PeopleSoft.

Roles Applicable to this Process

- Sponsor
- PI
- Unit Preparer
- Institutional Approver
- SPA Grant Administrator
Declination Notice from Sponsor

**Detailed Description:** If a sponsor chooses not to fund a proposal, the University will receive a declination notice. SPA receives the notice then distributes the information to the Principal Investigator (PI). The declination notice can be sent through campus mail, e-mail, or via the notify button in People Soft. In addition, the People Soft status is updated to record this event.

**Navigation:** Grants > Proposals > Maintain Proposal

Maintain Proposal Page, Proposal Tab

Withdrawal from PI/Department

**Detailed Description:** If a PI or a Department decides to withdraw a proposal they first submit a Withdrawal Letter to SPA. The GA then prepares a University Withdrawal Letter to send to the
sponsor. This letter is then institutionally approved, and the proposal status is changed in People Soft. The status on the Submit Proposal page must also be changed to Not Submitted.

Navigation: Grants > Proposals > Maintain Proposal

Maintain Proposal Page, Proposal Tab

Update Proposal Status

Detailed Description: Whenever a proposal is terminated, the status in People Soft must be updated to indicate as much, and to communicate the method by which the termination occurred. The options for termination status are:

<table>
<thead>
<tr>
<th>Withdrawal Method</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor Declination</td>
<td>5Term A Declined by Sponsor</td>
</tr>
<tr>
<td>Discontinued</td>
<td>5Term B Discontinued</td>
</tr>
<tr>
<td>Deleted</td>
<td>5Term C Deleted</td>
</tr>
<tr>
<td>PI/Department Withdrawal</td>
<td>5Term D Withdraw</td>
</tr>
</tbody>
</table>
File Process

Detailed Description:

Navigation: Grants > Awards > Negotiate Award
Appendix A

Proposal Award Tracking Reports

Run Control Page:

Navigation: Grants > Reports > Proposal and Award Tracking

Run Control ID: UM_RUN_FGM061

Proposal & Award Tracking Reports

Report Options

- Proposal Logging
- Proposal Summary
- GA Management
- Support Staff
- Contract Entry Management
- SPA Files

Grants Administrator
Proposal
Project
Department
PI
Sponsor
## Input Parameters:

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Y</td>
<td>Default from Operator Preferences (NOTE: not added to screen shot but still required)</td>
</tr>
<tr>
<td>Report Type</td>
<td>Y</td>
<td>Default as Proposal Logging</td>
</tr>
<tr>
<td>GA Y/N</td>
<td>Y/N</td>
<td>Must support GPC_2295 GA on Proposal and Award</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not required for Proposal Summary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Required for all other reports if no other parameter is populated</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Invisible if Proposal Summary is selected</td>
</tr>
<tr>
<td>Related - Display ONLY – GA Name</td>
<td></td>
<td>(PERSONAL_DATA.NAME)</td>
</tr>
<tr>
<td>Proposal Y/N</td>
<td>Required</td>
<td>Required for Proposal Summary, optional for all other reports</td>
</tr>
<tr>
<td>Related - Display ONLY – Proposal Title</td>
<td></td>
<td>(PROPOSAL.TITLE56)</td>
</tr>
<tr>
<td>Project</td>
<td>N</td>
<td>Optional for all reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Invisible if Proposal Summary is selected</td>
</tr>
<tr>
<td>Related - Display ONLY – Project Title</td>
<td></td>
<td>(PROJECT.TITLE56)</td>
</tr>
<tr>
<td>Department</td>
<td>N</td>
<td>Optional for all reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Invisible if Proposal Summary is selected</td>
</tr>
<tr>
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Proposal Logging Report

UNIVERSITY OF MINNESOTA

Proposal Logging Report for Run Control Field: Run Control Value

Proposals in Process

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Number of Proposals in Process: 6

GA Management Report

UNIVERSITY OF MINNESOTA

GA Management Report

Proposals in Process

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Number of Proposals in Process: 2

Awarded Proposals in Process

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Number of Awarded Proposals in Process: 1

Other Requested Modifications in Process

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Number of Other Requested Modifications in Process: 3

Pre-Award Advance Accounts in Process

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Number of Pre-Award Advance Accounts in Process: 1
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**Negotiation on Type**

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**Number of Proposals in Process:** 3

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