ORBiT Update: Create Proposal/Award Action

Department initiates Proposal/Award Action in ORBiT and routes to SPO

1. Select "Create Proposal/Award Action"

2. Enter the Record Number
   a. Reminder: For post-award actions, use the most recent record number.

3. From the Desk Action drop down menu, select the type of action
   a. Pre-award actions are **Black font**
      i. Note: TIA does not receive pre-award actions
   b. Post-award actions are **Orange font**

4. Click "Create" to bring you to the Desk Action Request Screen.

5. On the Desk Action Request screen:
a. Upload documents (if any)
b. Enter Deadline Date and/or Requested Deadline Date (if any)
c. Select who will submit to sponsor
d. Enter comments to SPO (if any)

6. Select "Save" if you're not ready to submit to SPO. The desk action will remain on the Work In Progress (WIP) queue under "Desk Action Requests".

7. Select "Submit to SPO" when the desk action request is ready for SPO to review.
   a. Once a desk action request is submitted to SPO, the desk action request is added to SPO's Intake Queue and removed from the department's WIP queue. The department is still able to upload documents to the request.
   b. If a desk action request needs to be revised, SPO will "return" the request to the department and explain why the request is being returned. The desk action will
go back onto the department's WIP queue and will be added to SPO's desk action queue.

8. If the desk action does not need to be routed through ORBit, SPO will "delete" the request after corresponding with the department.

8. SPO will accept the desk action request for review once they have all of the required components to review. An email of the review comments will be sent from SPO after reviewing the desk action.

**Department Receives Desk Action Request from SPO**

1. When SPO initiates a desk action request, an email will be sent to the department and added to the department's **WIP Queue** under Desk Action Requests.

   ![Email Template]

   - **To:**
   - **Cc:**
   - **Subject:** New Desk Action: [ID], [Date]
   - **Body:**

   "Hello,

   The following desk action was created:

   - Type of Desk Action: [Type]
   - Deadline Date: [Date]
   - Submitted to department by [Name]
   - Items to provide to SPO for review:
   - SPO Comments:

   Please contact your SPO team if you have questions.

   [Send Email]

2. On the WIP Queue, click on the record number to view the Desk Action Request screen."
3. On the Desk Action Request screen:
   a. Upload documents (if any)
   b. Enter Deadline Date and/or Requested Deadline Date (if any)
   c. Select who will submit to sponsor
   d. Enter comments to SPO (if any)

4. Select "Submit to SPO" when the desk action request is ready for SPO to review.
   a. Once a desk action request is submitted to SPO, the department is unable to edit the request. The desk action request is added to SPO’s Intake Queue and removed from the department’s WIP queue.
   b. If a desk action request is missing documents or needs to be revised, SPO will “return” the request to the department with “Intake Review Comments” that inform the department what needs revising. The desk action will be on the department’s WIP queue.

5. SPO will accept the desk action request for review once they have all of the required components to review. An email of the review comments will be sent from SPO after reviewing the desk action.