



# Office of Sponsored Projects & Industry Partnerships

## Sponsor Setup Process

Office of Sponsored Projects & Industry Partnerships  
One Cyclotron Road, MS46R0125 Berkeley, CA 94720 USA

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DOE/BSO no longer requires Fund Type and B&R information from OSPIP. Therefore, OSPIP and AR have agreed upon the following process improvements:

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#### 1. FUNDED AWARDS:

1. Eliminate the need for setting up Customers for new proposals and move it to part of AR Review. OSPIP will continue to create Sponsors at Proposal time, but Customer Setup will only be needed if there is an Award.
2. Eliminate OSPIP's input to AR's shared Excel Spread sheet for Customer Setup.
3. The OSPIP CO will determine the Award Type and negotiate the Advance. At the time of AR Review, if there are any questions, AR works with OSPIP CO.
4. AR will get the EIN/TIN and Contacts from the Award documentation sent by OSPIP CO at the time of AR Review.

Division	OSPIP	AR
1. Division notifies OSPIP CO that there is a new Sponsor.		
	<p>2. If Domestic Business, OSPIP CO sends <a href="#">Reps and Certs</a></p> <p>Once OSPIP CO receives Reps and Certs from the Sponsor, the OSPIP CO will forward it to OSPIP Administrator and #3 will be followed.</p>	
	<p>3. All Other New Sponsors are <a href="#">forwarded to OSPIP Administrator</a> to validate and set-up Sponsor in RAPID.</p>	
4. Division sends the proposal to the OSPIP CO		
	<p>5. OSPIP CO submits proposal to the Sponsor. OSPIP reviews RAPID data elements, enters OSPIP CO data elements including Awards_Type and Advance_Type.</p>	
	6. OSPIP CO Requests AR Review.	
		7. AR Reviews Proposal Set up

Division	OSPIP	AR
		8. AR Reviews Sponsor setup to assure bill/billing_ type combination has been setup. If a new setup is needed, AR completes the setup working with the OSPIP CO.
		9. AR approves proposal for Award Generation.
	10. OSPIP Generates Award.	

## 2. UNFUNDED AWARDS (Users, CRADAs, and Equipment Gifts):

The OSPIP CO sends an Email to [ARHelp@lbl.gov](mailto:ARHelp@lbl.gov) requesting the appropriate Award Type to be set up for a specific sponsor. See the email template below.

## 3. ADDITIONAL CUSTOMER SETUP FOR EXISTING SPONSORS

### ***Email Template***

To: [ARHelp@lbl.gov](mailto:ARHelp@lbl.gov)  
From: CO  
Subject: [Sponsor Code] [Award Type]

Sponsor Name:  
Sponsor Code:  
New Award Type Requested:  
New Billing/Advance type requested:  
Proposal No.: