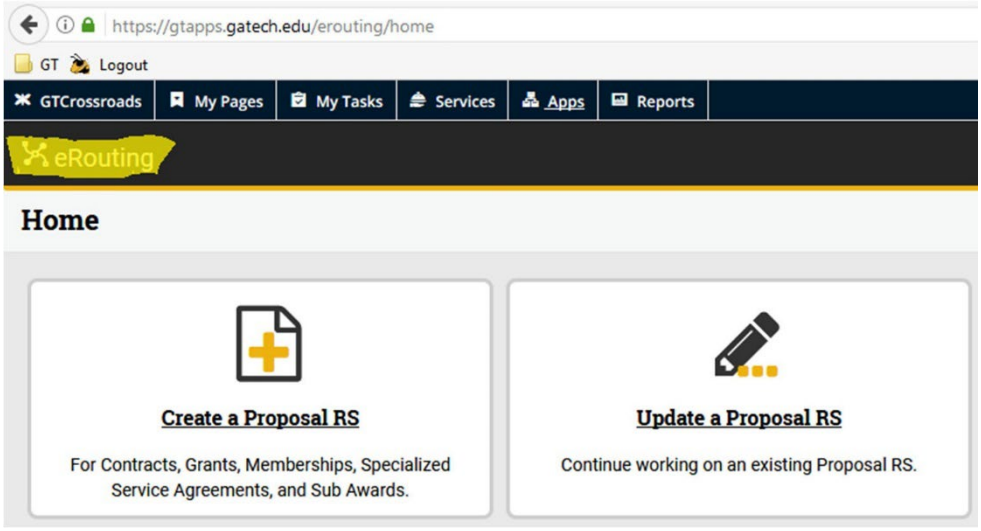
eRouting FAQs

How Do I return to the eRouting Home Page?

Click on the eRouting icon in the top left corner of the screen (highlighted below):



How Do I Get Added to an Approval Group?

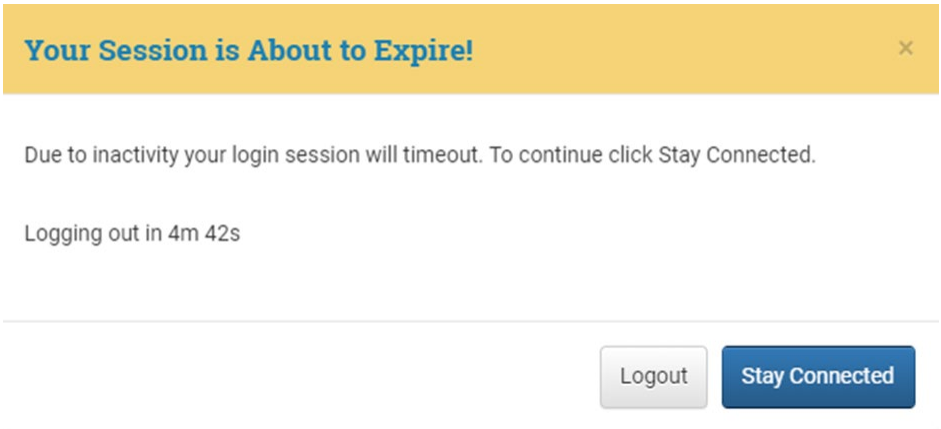
Submit at service desk ticket here: https://helpdesk.gtri.gatech.edu/jira/servicedesk/customer/portal/2

Does eRouting autosave information?

No - Remember to save before you navigate away since the system does not auto-save.

Is there a session timeout feature?

Yes - After 25 minutes the below popup displays. Users have two options. After five minutes if the user has not selected an option they will be logged out of the system.



How Do I Create a Proposal Routing Sheet?

Select Create a Proposal RS

The Key Personnel Data page will automatically open populated using the information from the user that initiates the routing sheet. Once the Key Personnel Data page is saved the routing sheet will officially be created in eRouting.

Enter the proposal's title and PI information. If a Co-PD/PI is from a different school, they must be listed here for eRouting to add that school's workflow to the approval chain.

Enter the CO information.

Be sure to mark the primary CO as lead. On the Proposal Data tab, enter the proposal type, type of award, RFP/RFA or solicitation number, and the total amount proposed.

Then enter the performance period, keywords associated with the proposal, Cost Share, and IRI data. On the next page, Sponsor data must be entered. This includes the sponsor's deadline, mailing address, and contact number.

If there is a sub-award for the proposal, you should include prime sponsor data. The Submission Information section details how the proposal should be submitted.

To submit an eRouting proposal for approval you must have filled out the following information:

- Key Personnel Data- All fields
- Proposal Data- Type of Award/Contract, Total Proposed Amount, Estimated Start Date, Estimated End Date, Estimated Length, IRI Data
- Sponsor Data- Sponsor Name, Due Date, Time Due, Prime Sponsor Information, Sponsor Contact Information, Submission Information,
- Attachments- Upload Budget, Budget Justification, and Technical Proposal (Scope of Work) on the attachments page. Files must be labeled as the appropriate file types. If you use the upload field on the F&A Rate page, they will be uploaded as F&A Supporting Documents and you will receive an error during submission.
- Grant Manager – This is a Workday role that is assigned by Grants and Contracts Accounting. If the name of the Grants Manager is unknown, the Cost Center Manager can assist in identifying the correct person.

Note: Not identifying a Grants Manager could delay the Workday award setup and/or result in notifications about the award not being directed to the correct person.

How Do I Access a Proposal?

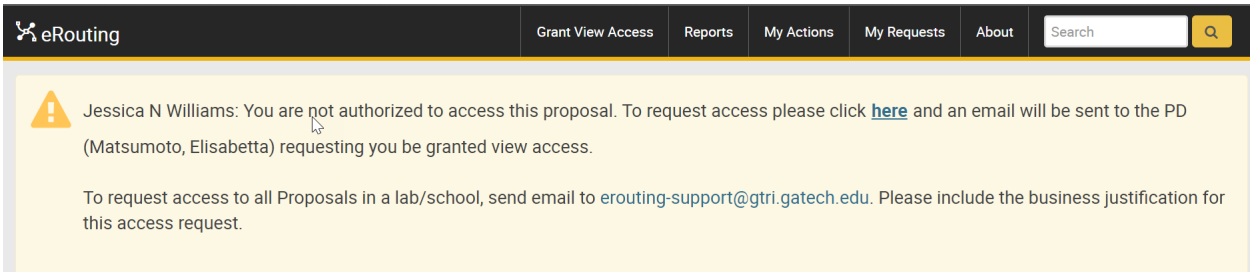
There are three ways to access proposals assigned to you in eRouting:

1. You will receive an e-mail letting you know that you have an action. Each e-mail will have a link directly to the proposal.
2. You can search for proposals in the search bar using the eRouting proposal ID number or the P number.
3. All proposals with pending actions assigned to you show up in My Actions.

How can I request Grant View Access?

Only the PD/PI can click on "Grant View Access".

When others are requesting view access, they should go straight to the proposal that they need view access for and request from that page, as shown below.



How Do I Review a Proposal Routing Sheet?

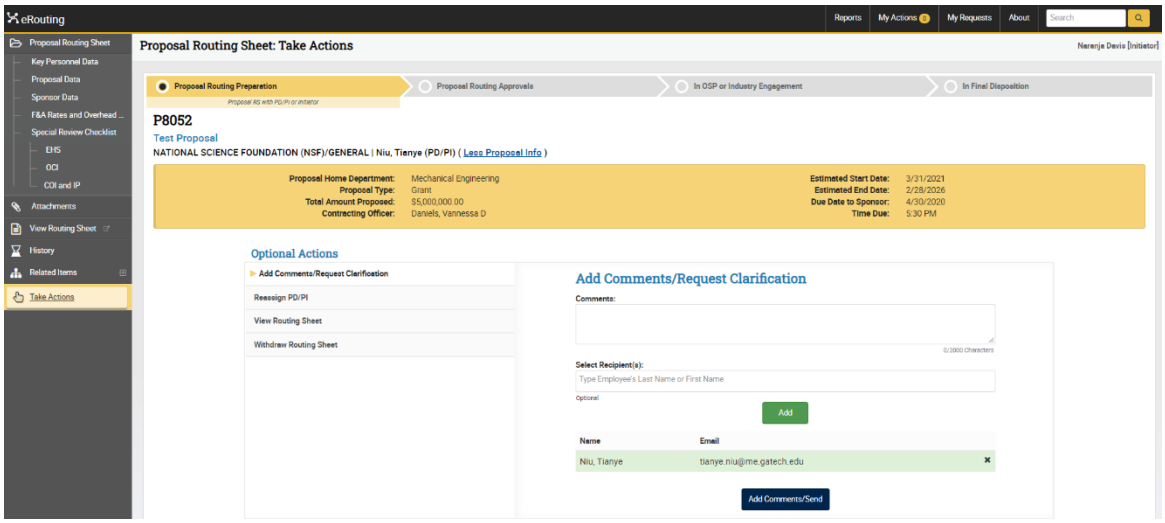
Use the left-hand navigation bar to review data.

When you are ready to perform an action, go to the Take Actions Tab.

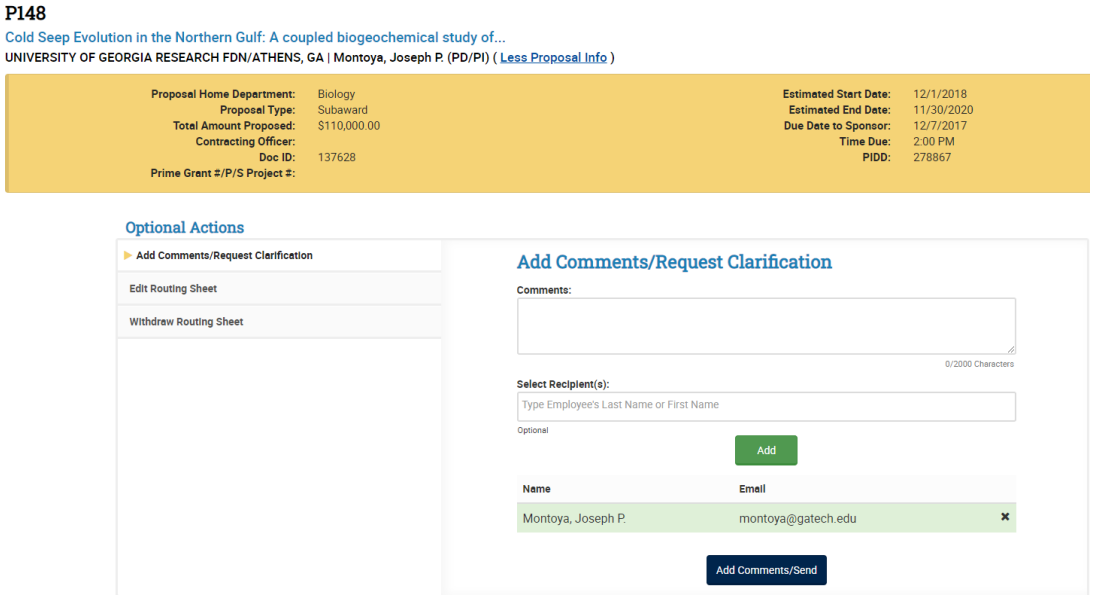
The special review checklist section will tell you where the proposal is in the approval process. This decides who will review your proposal on the back end.

How Do I Edit a Proposal Routing Sheet?

Select the "Update a Proposal RS" link. Choose the routing sheet to be updated.



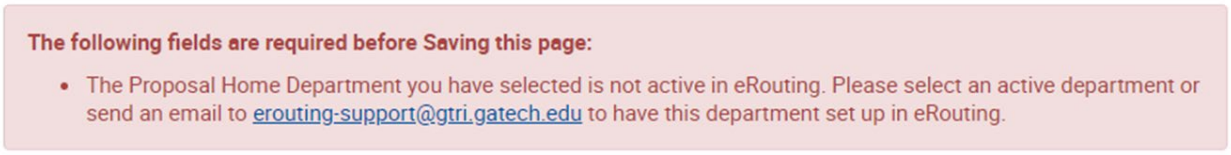
Once on the routing sheet, click the tab that says "Edit RS" in the center of the window.



From there you should be able to edit the routing sheet.

I don't see the appropriate department I need to add for routing. What do I do?

When a RI department has not been set up, the following message will be displayed:



Submit an email to erouting-support@gtri.gatech.edu to have this department set up in eRouting.

The Initiator started creating the routing sheet, but they aren't available and I need to make edits then submit to PI. How do I do that?

Unless the Initiator has finished creating the routing sheet and submitted it to the PI, changing the Lead Administrative Point of Contact (POC), while does allow for edits/attachments to be made, won't allow them to submit. You have two options:

- Submit request via training@osp.gatech.edu to be added as a Lead Admin POC so you can make edits, then switch Lead back to original Initiator and have them login to click Submit under Take Actions tab;
- Create a new routing sheet and submit to PI, then once the original Initiator is able you can have them Withdraw the routing sheet that wasn't finished.

How Do I Edit a Routing Sheet After it has Been Submitted?

You cannot edit an eRouting sheet once it has been submitted; however, you can pull back the routing sheet to make changes.

*Unless you are on the approval chain. You can make corrections to the following fields:

- Title
- Admin Point of Contact
- Keywords
- IRI Data
- Sponsor Contacts
- Submission Method

Can I change approvers in the routing chain?

COs can follow these steps to add an ad-hoc approver:

- Search for the P Number
- Navigate to the Take Actions page
- Under Optional Actions there is a button called "Request Additional Signatures"
- Add additional approvers accordingly, notating why in the comments section

What is the Difference between Pullback and Withdraw?

When a routing sheet is pulled back it can still be resubmitted. However, if a routing sheet is withdrawn, it cannot be resubmitted.

NOTE: If edits are needed after the Contracting Officer has accepted the routing sheet, only he or she will have the ability to make the edits.

On the approval side, I noticed there is no "deny" or "send back" button. In "Other Available Actions", the only two choices are "Add Comments / Request Clarification", and "Add Additional Signatures".

The person in an approval role can only *Add Comment* or *Request Clarification* to note why they disapprove and request edits or withdrawal. In other words, they should put in the comment box why they are denying the request and ask for any clarification/changes. The PI/PD can then respond with a comment or pull the routing sheet back to make edits. That's why the approver doesn't have a "send back" or "deny" button.

The **PI** or **Initiator/Lead Admin POC** are the roles able to **Withdraw** the proposal once denied.

If something needs to be corrected on a Proposal within eRouting after being submitted, should it be returned, or should it be withdrawn?

It is better to Return the request (with specific notes in the comment section on why it was returned) and let the initiator or PI edit it that way (even if it requires rerouting thru any approvals) as to avoid multiples of the same routing sheet that can make it confusing for anyone running a search or reports. They should be able to make those edits and resubmit through the approval flow. The only things that can be edited without requiring it to route back through approvals are those found on the *Make Corrections* guide, which includes primarily information on the *Key Personnel Data* page.

For someone to need to Withdraw a routing sheet there should be no other way to get it processed/edited OR they have decided not to submit the proposal.

If an Initiator or PI doesn't see the capability to *Edit Routing Sheet* within their *Take Actions* tab, reach out to the training team via e-mail at training@osp.gatech.edu to see if we can assist them. This shouldn't be a problem if a CO or approver returns it; typically only when a CO has accepted the routing sheet will they no longer be able to make edits.

Can I reply to e-mails sent from the eRouting system?

No. Please add your comments/responses directly in eRouting by using the Add Comments/Request Clarification option on the Take Actions page.

Do I need to send reminder e-mails to users who need to take action on a proposal?

Reminder emails are sent to all users who need to take an action on a Proposal on the third business day of no action being taken on the proposal, and every 24 hours after, excluding weekends.

What are the required documents that need to be attached?

The following documents are required to submit any proposal:

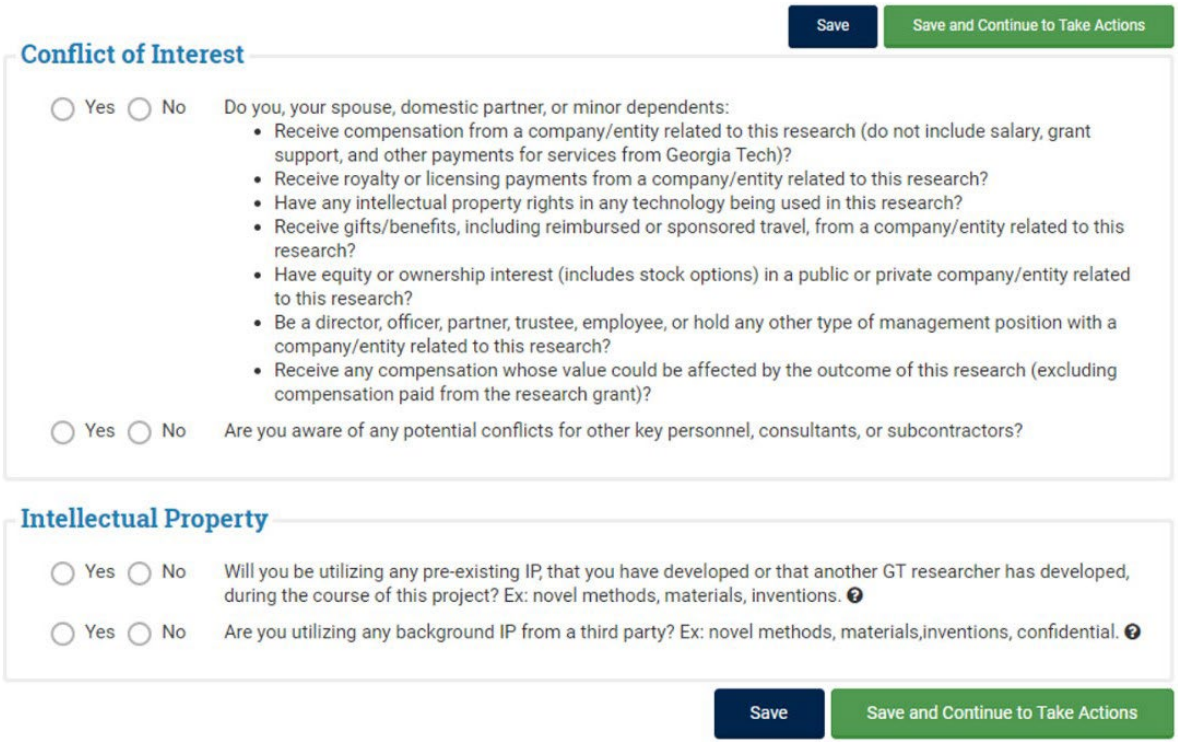
- **Budget Justification** - This is the corresponding narrative that provides additional details about the budget.
- **Formal Budget/Cost** - This is the detailed, line-item budget, preferably in excel format.
- **Technical Proposal/SOW** - This is a project summary or short scope of work for the proposal.

These documents may be required depending on the proposal:

- **Cost Share Approval Form** - This form can be found on the OSP website and must be included if your proposal involves cost share. You may include a copy of electronic approvals from GT TRACS in lieu of signatures.
- **Cost Share Letter of Commitment** - If a third party is contributing to cost share, upload a letter confirming their contribution.
- **F&A Rate Supporting Documentation** - Required if you are requesting a reduced overhead rate or an overhead waiver.
- **Fixed Price Authorization** - Memo signed by the Chair agreeing to support a fixed price project.
- **Letters of Support/Letters of Intent** - If you would like to include letters of support or intent from any collaborators, place them here. THIS IS NOT FOR SUBAWARD DOCUMENTS.
- **Memo** - GTRI Only
- **OCI Form** - GTRI Only
- **RFR/Source Reference** - GTRI only
- **Sub-award Budget/Letter of Commitment** - Upload your subawardee's budget and letter of commitment here.
- **Supporting Documents** - Any additional documents you would like to submit along with the routing sheet will fall under this category.

What are the Required Questions for Principal Investigators?

Principal Investigators (PI's) are required to answer the question relating to conflict of interest and Intellectual property.



This section will be grayed out for the submitter but will be accessible to answer by the PI.

When submitting a routing sheet for a Transitional Faculty member under their Department Head/Chair, you will need to provide a separate document with a signed certification of these questions and attach this information in the documents section since they are unable to certify within the system.

How Do I Reassign the Routing Sheet?

Anyone in OSP can reassign the routing sheet to the correct Contracting Officer.

How Do I Request an Overhead waiver?

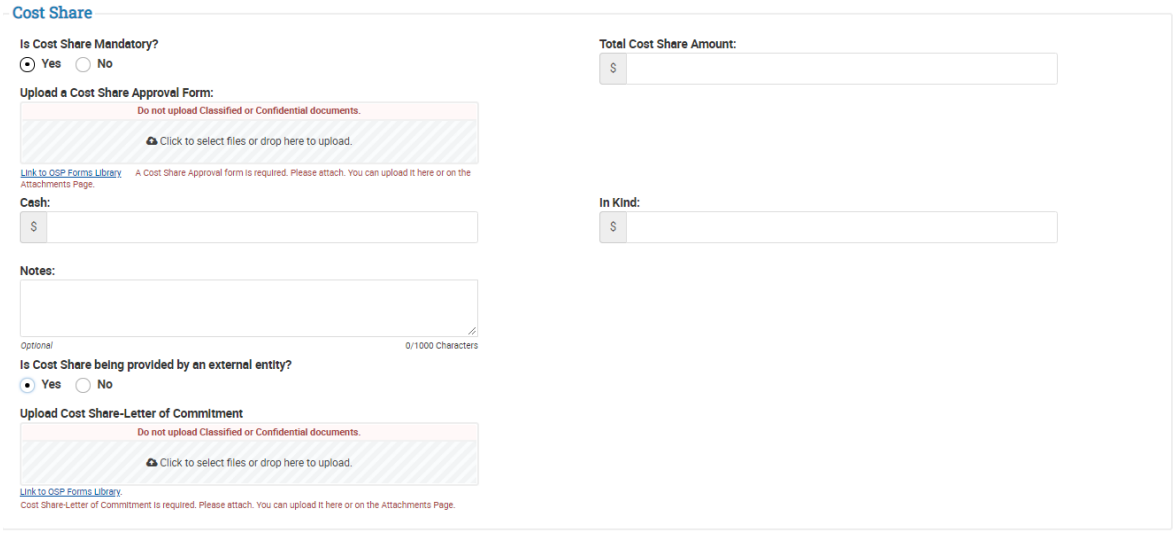
F&A Rate supporting documentation is required to request an overhead waiver.

How Do I Request an Overhead Waiver with a Published Rate?

For both Federal and US Non-Profit solicitations that require a lower rate, enter either a link to the solicitation or upload a copy of the relevant selection of the solicitation in the field provided.

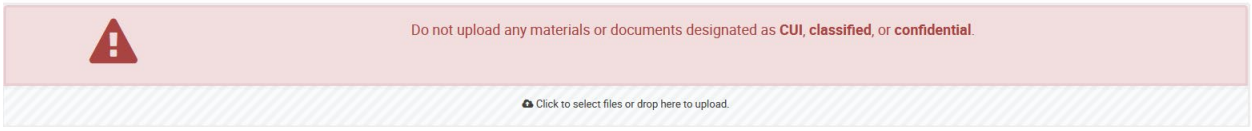
How Do I Attach Cost Share Forms?

Answer "*yes*" to mandatory cost share, provide the required information and upload your documents in the provided sections.

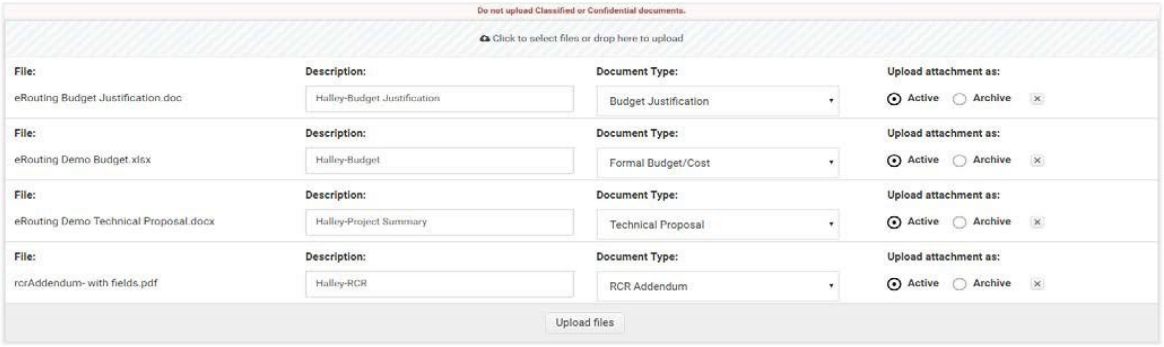


How Do I Upload an Attachment?

You may upload files by dragging and dropping them into the gray box or by clicking on the gray box:



Once you select a file, you must enter a description and select a document type. You must also choose whether a file is Active or is being uploaded as an Archived file. Any documents you were prompted to upload while completing the routing form should already appear as Active attachments.



For those files, the document type is assigned by the section of the proposal prompting the upload (i.e. Cost Share documentation, RCR Addendum, Subaward information):
If you uploaded a file and you need to upload a revised version, archive the file you don't want to use prior to uploading the revised version. NOTE: Archived files are for documentation only and will not be visible to OSP.

Available Document Types are:

- Budget Justification – This is the corresponding narrative that provides additional details about the budget.
- Cost Share Approval Form – This form can be found on the OSP website and must be included if your proposal involves cost share. You may include a copy of electronic approvals from GT TRACS in lieu of signatures.
- Cost Share Letter of Commitment – If a third party is contributing to cost share, upload a letter confirming their contribution.
- F&A Rate Supporting Documentation – Required if you are requesting a reduced overhead rate or an overhead waiver.
- Fixed Price Authorization – Memo signed by the School Chair agreeing to support a fixed price project.
- Formal Budget/Cost – This is the detailed, line-item budget, preferably in excel format.
- Letters of Support / Letters of Intent – If you would like to include letters of support or intent from any collaborators, place them here. THIS IS NOT FOR SUBAWARD DOCUMENTS.
- Memo – GTRI Only
- OCI Form – GTRI Only
- RCR Addendum – The Office of Sponsored Programs will no longer require the RCR Addendum when eRouting a proposal to a sponsor with RCR requirements (see RCR Addendum note on page 3 for more details).
- RFR / Source Reference – GTRI only
- Subaward Budget / Letter of Commitment – Upload your subawardee's budget and letter of commitment here.
- Supporting Documents – Any additional documents you would like to submit along with the routing sheet will fall under this category.
- Technical Proposal – This is a project summary or short scope of work (SOW) for the proposal.

The budget justification, formal budget, and technical proposal are **MANDATORY** and must be uploaded to submit a routing sheet (highlighted in yellow above).

Including an attachment on the routing form does not ensure that these files are included in the proposal. Please be sure to upload the appropriate attachments when preparing your proposal.

RCR Addendum

The Office of Sponsored Programs will no longer require the RCR Addendum when eRouting a proposal to a sponsor with RCR requirements. Instead, in the Special Review Checklist section, when the question "Is the Sponsor/Prime sponsor NSF, NIH or NIFA?" is answered “Yes”, the following certification will appear:

If an award is received, I certify that I will comply with the Institute’s RCR Compliance Policy including the Institute’s Plan for meeting Sponsor Requirements for training students, postdocs, faculty, and staff. If an RCR training plan is required by the sponsor, I will submit a project-specific RCR training plan prior to the establishment of an award.

If a sponsor requires a project-specific RCR plan be included with the proposal (e.g. some NIH programs), OSP will ensure the plan is included.

GT Invention Disclosure (Intellectual Property)

Where can I find information about the GT Invention Disclosure?

https://licensing.research.gatech.edu/researcher-toolkit/reporting-your-innovation

https://gatech.wellspringsoftware.net/kms/onlinesubmissions/submissionform/?survey_id=1