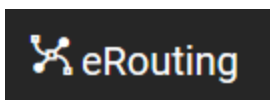


# Georgia Institute of Technology

## eRouting Manual

**Research Education, Outreach & Strategic Support  
Office of Research Operations & Infrastructure**

Contact us with any questions: [training@osp.gatech.edu](mailto:training@osp.gatech.edu)



## **Manual**

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## Home Page

When you log in to eRouting, you will have the following options:

**Home**

DO NOT use eRouting to store classified or sensitive PII data.

- Proposals**
  - Create a Proposal RS
  - Create a Modification
  - Clone a Proposal RS
  - Search all Proposals
  - Create IEN Modification
- Non-Disclosure Agreement**
  - Create an NDA Request
- Material Transfer Agreement**
  - Create an Incoming MTA Request
  - Create an Outgoing MTA Request
- Data Use Agreement**
  - Create a DUA Request
- Export Control**
  - Only COs** Create a New Sponsored Export Review
  - Only COs** Create a New Non-Sponsored Export Review
  - Search Export Reviews

## Proposals Module

1. **Create a Proposal RS** - This will allow you to create a routing sheet for a new proposal.
2. **Create a Modification** - This will allow you to submit a routing sheet for a modification of an existing award. You will use this option to submit supplements, no-cost extensions, etc.
3. **Clone a Proposal RS** - This will allow you to copy information from a previously submitted routing sheet into a new routing sheet. This is helpful for resubmissions.
4. **Search All Proposals** - This allows you to search for all routing sheets.
5. **Create IEN Modification** - Only for use by the Institute for Electronics and Nanotechnology IRI

## Exchange Agreements Modules

The Exchange Agreements modules (NDA, MTA, and DUA) are used to request the various exchange agreements. There are separate training courses for each module within the [Learning Management System](#).

## Export Control Module

There is a separate training regarding Export Control, and you can also note that some of those functions are meant only for COs to use. Contact [export@gatech.edu](mailto:export@gatech.edu) for additional information there. Further aspects regarding Export Control concerning the Special Review Checklist are discussed.

## 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 for which they need view access for and request from that page.

**eRouting**

Grant View Access Reports My Actions My Requests About Search

**Warning:** Jessica N Williams: You are not authorized to access this proposal. To request access please click [here](#) and an email will be sent to the PD (Matsumoto, Elisabetta) requesting you be granted view access.

To request access to all Proposals in a lab/school, send email to [erouting-support@gttri.gatech.edu](mailto:erouting-support@gttri.gatech.edu). Please include the business justification for this access request.

## My Actions

The My Actions screen shows any proposals that are waiting for you to perform an action.

This table displays Proposal Routing Sheets assigned to you and require your attention.

Drag a column header and drop it here to group by that column

ID	Request Type	Status	Proposal Title	PD/PI	Dept Org ID	Sponsor	Sponsor Due Date	Date Received	# of Days on my Inbox
<a href="#">P236</a>	Overhead Waiver	Pending Approval	SWDSRDS ENGINEERING SUPPORT- modification	Kathleen Meaghen	Programs (OSP)	SHARING ALLIANCE/FOLSOM, CA	4/13/2017	4/20/2017 11:23 AM	69
<a href="#">P243</a>	Proposal Routing Sheet	Pending Approval	gtpe	Kriigel, William D	GTRI- Enterprise Systems	AKEBONO CORP/FARMINGTON HILLS, MI	5/31/2017	5/8/2017 01:24 PM	59
<a href="#">P244</a>	Proposal Routing Sheet	Pending Approval	testing GTP buttons	Carrau, Alejandra (Sandra)	GTRI- Enterprise Systems	DOD/DEFENSE ADVANCED RESEARCH PROJECTS AGENCY(DARPA)	5/23/2017	5/8/2017 05:50 PM	59
<a href="#">P242</a>	OCI	Pending Approval	MODIFICATION IN TEST-MINIMED MEDICAL DEVICE E3 TE...	Halley- Octa, Kathleen Meaghen	Sponsored Programs (OSP)	MEDTRONIC MINIMED/NORTHBRIDGE, CA	5/25/2017	5/8/2017 12:54 PM	59
<a href="#">P242</a>	Overhead Waiver	Pending Approval	MODIFICATION IN TEST-MINIMED MEDICAL DEVICE E3 TE...	Halley- Octa, Kathleen Meaghen	Sponsored Programs (OSP)	MEDTRONIC MINIMED/NORTHBRIDGE, CA	5/25/2017	5/8/2017 12:54 PM	59
<a href="#">P255</a>	Overhead Waiver	Pending Approval	Test Proposal	Braig, Kathleen	Ctr Quality Growth &	NATIONAL SCIENCE FOUNDATION	5/24/2017	5/10/2017 10:16 AM	57

1 - 25 of 32 items

To access a proposal, click on the link under the ID column.

## My Requests

The My Requests screen shows any proposals for which you are one of the following roles:

- PD/PI
- Co-PD/PI
- Initiator
- Lead Admin POC
- CO

To access a proposal, click on the link under the ID column.

### My Requests - Proposals

This table displays any Proposal Routing Sheets that relate to you.

Export to Excel

Drag a column header and drop it here to group by that column

ID	Status	Title	Initiator	PD/PI	PD/PI Dept Org	Total Amount Proposed	Sponsor	Sponsor Due Date	Assigned CO
<a href="#">P132</a>	Proposal Withdrawn	ECOCARS	Fuller, Thomas F	Fuller, Thomas F	Chemical and Biomolecular Engr	\$297,368.16	ARGONNE NATL LAB/UCHICAGO ARGONNE LLC/ARGONNE, IL	12/31/2017	D'Urbano, Christopher
<a href="#">P156</a>	Proposal Awarded	An Experimentally Verified Physical Properties Dat...	Schlag, Leslie Jeanne	Sholl, David S	Chemical and Biomolecular Engr	\$379,229.00	AMERICAN INSTITUTE OF CHEMICAL ENGINEERS (AICHE)/NEW YORK, NY	12/13/2017	D'Urbano, Christopher
<a href="#">P158</a>	Proposal Awarded	NNMI/RAPID: SYNOPSIS--Synthesis of Operable Process...	Schlag, Leslie Jeanne	Boukouvava, Fani	Chemical and Biomolecular Engr	\$79,271.00	TEXAS A & M UNIVERSITY/COLLEGE STATION, TX	12/13/2017	D'Urbano, Christopher
<a href="#">P321</a>	RS with PD/PI or Initiator	Test PLEASE DISREGARD!	Jenkins, Joseph C	Halley- Octa, Kathleen Meaghen	Sponsored Programs (OSP)	\$500,000.00	DHHS/PHS/NIH/NATIONAL CANCER INSTITUTE(NCI)/BETHESDA, MD	5/07/2018	D'Urbano, Christopher
<a href="#">P1373</a>	RS with PD/PI or Initiator	DYNAMICS OF CONTACTLESS ULTRASONIC POWER TRANSFER ...	D'Urbano, Christopher	Erturk, Alper	Mechanical Engineering	\$348,119.00	NATIONAL SCIENCE FOUNDATION (NSF)/GENERAL		Johnson, Stacey Oliver

Please note that you are able to export all of this data to Excel by clicking the Export to Excel button in the gray margin

Export to Excel

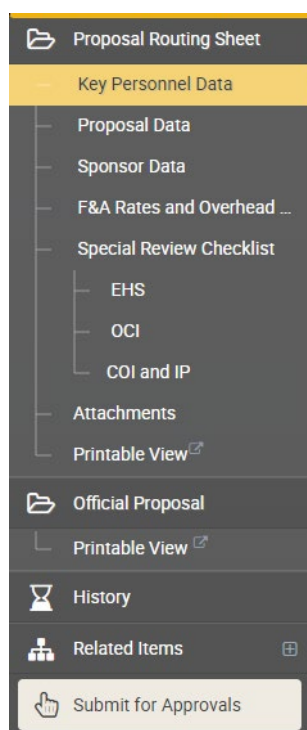
Clone	ID	Type	Status	Title	Initiator	PD/PI	PD/PI Dept Org	Total Amount Proposed	Sponsor	Sponsor Due Date	Assigned CO	Award/Fund #
	<a href="#">P2181</a>	New	Proposal Awarded	Rook Technical Report	Lashley, Matthew	Lashley, Matthew	GTRI-Sensors Elec (G TRI-SEAL)	\$175,789.00	SPACE DYNAMICS LAB/LOGAN, UTAH	2/22/2019	Hobbs, Debra Peery	D8844

## Search

You can search for proposals in eRouting using any of the following criteria:


## Creating a Proposal Routing Sheet

There are a few items that will follow the routing sheet through the entire process. Navigation Sidebar:



You can use this feature to move back and forth between sections.

**Remember to save before you navigate - the system does not autosave!**

If you see this floppy disc icon:  it means you have unsaved changes and should save before navigating away.

**Note:** 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

**Your Session is About to Expire!** ×

Due to inactivity your login session will timeout. To continue click Stay Connected.

Logging out in 4m 42s

---

Logout
Stay Connected

### Proposal Header:

The proposal header auto-populates as you input data into the routing sheet. This allows you to access data from different screens throughout the routing process.

<b>Proposal Home Department:</b>	Chemical and Biomolecular Engr	<b>Estimated Start Date:</b>	9/1/2017
<b>Proposal Type:</b>	Grant	<b>Estimated End Date:</b>	8/30/2022
<b>Total Amount Proposed:</b>	\$5,000,000.00	<b>Due Date to Sponsor:</b>	3/17/2017
<b>Contracting Officer:</b>	Blackwell, Tanya M.	<b>Time Due:</b>	05:00:00 PM


## Key Personnel Data

When you start a new routing sheet, you will automatically enter the “Key Personnel Data” Page. Once you save this page, a routing sheet will officially be created in eRouting.

### PD/PI

The screenshot shows the 'PD/PI' form with the following details:

- Name:** McGlade, Brien P. Below the field is a warning: "Changing this will affect approval workflow." and a "Change" button.
- Email:** bmcglade3@gatech.edu
- Department Org ID:** Inst for Elect & Nanotechgy
- Phone Number:** 404/385-5963
- Proposal Home Department:** Inst for Elect & Nanotechgy (138). Below the field is a warning: "Changing this will affect approval workflow." and a "Change" button.
- Campus Address and Mail Code:** An empty text area with a character count of 0/250 Characters.
- Optional:** A label for the Campus Address and Mail Code field.
- Transitional Faculty:** A checkbox labeled "This Proposal involves a Transitional Faculty."
- Buttons:** "Save" and "Save and Continue" buttons are located at the top right.

This section auto-populates based on the user who initiates the routing sheet. You can change the PD/PI by clicking the  button and selecting the correct PD/PI. Contact information is pulled from HR databases.

A new checkbox option is included to indicate that the proposal involves a **Transitional Faculty Member**, where the initiator can also provide the individual’s name.

### Key Feature:

The close-up shows the 'Proposal Home Department' field with the value 'Mechanical Engineering (250)'. Below the field is a warning: "Changing this will affect approval workflow." and a "Change" button.

eRouting uses the Proposal Home Department field to determine a proposal’s routing workflow. The field auto-populates to a PD/PIs home department, but **may be changed** to reflect appointments in multiple units or association with an IRI.

## Title

Enter the title of the proposal as it will be listed on the submission. You can also note if this is considered a Special Program:

**Title**

**Proposal Title:**

Title of Project, just as it is within the proposal submission

62/1000 Characters

**Is this Proposal a Special Program?**

☒ Yes ☐ No

**Special Programs List:**

Select Special Programs

Select Special Programs

- AASERT
- AREAL
- ARRA
- BIG DATA
- BIOCOMPLEXITY
- BRIDGE
- CAREER
- CDAIT

## Co-PD/PI(s)

Use this field to add Co-PD/PIs to a proposal routing sheet. 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.

**Co-PD/PI(s)**

**Co-PD/PI(s):**

Type Employee's Last Name or First Name

Add

Optional. You can add multiple Co-PD/PI(s).

## Workday Grants Manager

**Workday Grants Manager**

Do you know the Workday Grants Manager? If not, please select No.

☒ Yes ☐ No

**Workday Grants Manager:**

Type Employee's Last Name or First Name

Add

You can add multiple Workday Grant Managers.

This is a Workday role that is assigned by Grants and Contracts. 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.

## Administrative Point of Contact

This is the person the Contracting Officer in OSP should contact if they have any questions about the proposal routing sheet or submission. This also auto-populates with the contact information of the initiates the routing sheet. You may have multiple administrative points of contact but there must be one primary contact who will be listed as the "lead" admin point of contact.



**Administrative Point of Contact**

Administrative Point of Contacts:

Type Employee's Last Name or First Name

You can add multiple Administrative Point of Contacts.

Lead	Name	Email	Phone Number	Department Org ID	Campus Address and Mail Code
<input checked="" type="radio"/>	Halley, Kathleen Meaghen	kathleen.halley@osp.gatech.edu	404/894-0410	OSP /610	<input type="button" value="x"/>

Use radio button to select Lead Admin PoC.

### Initiator

<b>Initiator Name:</b>	Steltzer, Angela L	<b>Department Org ID:</b>	ASDL
<b>Initiator Phone:</b>	404/385-3645	<b>Created Date:</b>	5/10/2019

eRouting tracks who initiates each routing sheet. This information cannot be changed. It is also important to note that only the initiator will be able to submit to the PD/PI for certification and submission.

### Save and Continue

**Save and Continue**

**In order to officially create a routing sheet, you must fill out all required information on the Key Personnel Data Sheet and then click Save and Continue.** The system does not auto-save and if you do not click Save and Continue, you will have to re-enter the Key Personnel Data.

## Proposal Data

After clicking Save and Continue, you will move on to the Proposal Data tab. At this point, your proposal will be assigned a proposal reference number. You can use this number to search for your proposal.

**P2181**

Derek Zoolander Center for Kids Who Read Good and Want to Do Other Stuff Go...

NATIONAL FOUNDATION ON THE ARTS & HUMANITIES/NATL ENDOWMENT | Halley, Kathleen Meaghen (PD/PI)

### Proposal Data

#### Proposal

Proposed Award Type:

Select Proposed Award Type

Proposal Award/Classification:

New

Proposed Funding Type:

Cost Reimbursement No Fee

Total Amount Proposed:

\$

RFP/RFA or Solicitation Number:

Enter RFP/RFA number or url

Optional

0/100 Characters

Will this project result in an interdivisional transfer between RI and GTRI?

☐ Yes ☐ No

Next, you will enter data about the type of proposal you will be submitting.

#### Proposed Award Type:

*Basic Ordering Agreement (BOA)*

*Contract*

*CRADA (Cooperative Research & Development Agreement)*

*Faculty Service Agreement*

*Grant*

*Indefinite Delivery Indefinite Quantity (IDIQ)*

*Interagency Personnel Act Agreement (IPA)*

*Membership* - Note the cash/in-kind boxes that come up

*Research Gift* - Note the question: Should a Development Officer receive credit for this gift? If yes, select Development Officer

*Specialized Service Agreement*

*Subaward*

*Task Order*

*Unfunded Agreement*

**Proposal Classification:** This field is auto-populated based on which option you chose from the home screen (New or Modification).

**Type of Award/Contract:**

- Cost Reimbursement No Fee
- Fixed Price
- Time and Materials

**Total Amount Proposed:** The amount requested from the sponsor.

**Is this proposal responding to an RFP which limits submissions per contractor?** Select whether this is considered a Limited Submission application.

**RFP/RFA or Solicitation Number:** This field allows you to provide your contracting officer with a link to your solicitation or with a solicitation number so they can easily find the proposal guidelines.

**Will this project result in an interdivisional transfer between RI and GTRI?** Answer yes or no, depending on specific proposal details.

**Performance Period:**

**Performance Period**

<b>Original Estimated Start Date:</b> <input type="text" value="9/1/2017"/> <small>MM/DD/YYYY</small>	<b>Original Estimated End Date:</b> <input type="text" value="8/31/2025"/> <small>MM/DD/YYYY</small>
<b>Estimate Length Type:</b> <input checked="" type="radio"/> Months <input type="radio"/> Days	
<b>Estimated Length in Months:</b> <input type="text" value="96"/>	

Enter the estimated start date, end date, and length of the project for your proposal.

**Keywords**

**Keywords**

<b>Keywords:</b> <input type="text" value="Type keyword"/> <small>Select any OSP existing values.</small> <input type="button" value="Add"/>	<b>Keywords (Users Choice):</b> <input type="text"/> <small>You can add multiple Keywords separated by commas.</small>
<b>Selected Keywords:</b> <hr/>	

This is a required field. Please add Keywords or enter your choice in Keywords(User Choice)

You **must** select keywords related to your project. A list will populate as you begin to type. Once you find the appropriate word, click the green “Add” button. If an appropriate word is not in the list, you may enter a new keyword in the “users choice” field.

**IRI Data**

This section of the routing form will help the EVPR’s office track IRI influence. If you select yes, three questions will appear. For each question, you can select one or more IRIs in each area of assistance. Use the green arrow to move IRIs into the column on the right.

**IRI Data**

Did any of the IRIs provide assistance in the preparation of this proposal?

☒ Yes ☐ No

Which IRI provided assistance in the preparation of this proposal in the form of Seed Funding, if any?

Select IRI:

- BISS (Brook Byers Institute for Sustainable Systems)
- GTMI (Georgia Tech Manufacturing Institute)
- IDEaS (Institute for Data Engineering and Sciences)
- IEN (Institute for Electronics and Nanotechnology)

Selected IRI:

IBB (Institute for Bioengineering and Bio science)

Clear

Which IRI provided assistance in the form of Proposal Preparation, if any?

Select IRI:

- BISS (Brook Byers Institute for Sustainable Systems)
- GTMI (Georgia Tech Manufacturing Institute)
- IBB (Institute for Bioengineering and Bio science)
- IEN (Institute for Electronics and Nanotechnology)

Selected IRI:

IDEaS (Institute for Data Engineering and Sciences)

Clear

Which IRI provided assistance in the preparation of this proposal helping to form the team of PD/Pis, if any?

Select IRI:

- IMAt (Institute for Materials)
- IPAT (Institute for People and Technology)
- IRIM (Institute for Robotics and Intelligent Machines)
- RBI (Renewable Bio products Institute)

Selected IRI:

SEI (Strategic Energy Institute)

Clear

### Cost Share

If Cost Share is included in your proposal, check yes and enter the total amount of cost share. You are also able to reflect a combination of cash and in-kind commitments. You can then upload your cost share form using the gray box. You can also upload this form via the attachments page. You are required to upload a cost share form if cost share is included in the proposal. If cost share is routed through GT TRACS, you may upload the package that includes the cost share spreadsheet and electronic signatures. If there is cost share being provided by an external entity, you must upload the letter of commitment as well.

**Cost Share**

Is Cost Share Mandatory?

☒ Yes ☐ No

Upload a Cost Share Approval Form:

DO NOT upload any materials designated as classified or contain sensitive PII data.

Click to select files or drop here to upload.

[Link to OSP Forms Library](#) A Cost Share Approval form is required. Please attach. You can upload it here or on the Attachments Page.

Cash:

\$

In Kind:

\$

Notes:

Optional 0/1000 Characters

Is Cost Share being provided by an external entity?

☐ Yes ☒ No

Once you have filled in all the required fields, you may click save or save and continue to proceed.

Save

Save and Continue

## Sponsor Data

On this tab, you will enter data about the sponsor to whom you will be submitting the Proposal.

### Sponsor Data

#### Sponsor

Sponsor: ?

[Link to Sponsor Types Diagram \(Definitions\).](#)

☐ The Sponsor is not located or is new to GA Tech.

**Sponsor:** This field will bring up a filtered list as you start typing.

If your sponsor is not located, please check the box underneath the sponsor field. You will then be prompted to enter the name of a new sponsor **and whether that sponsor is an Industry or International sponsor.**

Sponsor: ?

☒ The Sponsor is not located or is new to GA Tech.

New Sponsor: ?

Is Sponsor Industry and/or International?

☐ Yes ☐ No

Next, you will enter the following information:

Due Date to NATIONAL FOUNDATION ON TH: ?

Time Due:

Mailing Address:

Optional

Sponsor Contract Number:

Optional

**Due Date:** This is the sponsor's deadline. Please submit the routing sheet to OSP at least three business days in advance. **Time Due:** Select the time of the deadline. Example: 5:00 PM.

**Mailing Address:** Enter the mailing address of the sponsor. (Optional for Federal Sponsors)

**Sponsor Contract Number:** If you already know the contract number, you may enter that information here (Optional). If NSF is the sponsor, you can also enter the Temporary Proposal ID assigned by FastLane and the NSF Division Code.

**NSF Temporary Proposal Number:**

143241

Optional

**NSF Division Code:**

Division of Civil, Mechanical & Manuf: ▼

Optional

[NSF Organization List](#)

**Is this a foreign Sponsor?** Select the country in which the Sponsor is located. (Required)

Is this a foreign Sponsor?

☒ Yes ☐ No

**Country:**

Select a Country

This is a required field. Please select.

### Prime Sponsor

Are you receiving a subaward from another entity? If so, select yes.

#### Prime Sponsor

Is there a Prime Sponsor for this proposal?

☒ Yes ☐ No

**Prime Sponsor:** ⓘ

Type Sponsor Name

[Link to Sponsor Types Diagram \(Definitions\)](#)

☐ The Prime Sponsor is not located or is new to GA Tech.

**Due Date to Prime Sponsor:**

**Time Due:**

**Mailing Address:**

Optional

0/250 Characters

**Prime Sponsor Contract Number:**

Optional

**Source of Funds:** ⓘ

Optional

**Contract Number for Source of Funds:**

Optional

Is this a foreign Prime Sponsor?

☐ Yes ☐ No

**Prime Sponsor:** This is the Federal Government entity from which the funds originate. Example: If Emory receives an NIH award and gives us a subaward, NIH is the Prime Sponsor, and Emory is the Sponsor. For OSP's purposes, only Federal Government prime sponsors are to be entered in this field.

**Due Date/Time Due:** This is the date and time the Prime Sponsor expects the proposal. This should be later than the deadline listed in the Sponsor information section.

**Mailing Address:** Enter the mailing address of the sponsor. (Optional for Federal Sponsors)

**Prime Sponsor Contract Number:** If you already know the contract number, you may enter that information here (Optional).

**Source of Funds:** If the funding you will receive from the prime sponsor flows through any other organizations, include the original source of funds here.

**Contract Number for Source of Funds:** If you already know the contract number, you may enter that information here (Optional).

**Is this a foreign Sponsor?** Select the country in which the Sponsor is located. (Required)

Is this a foreign Sponsor?

☒ Yes ☐ No

Country:

Select a Country

This is a required field. Please select.

### ***Sponsor Contacts***

Enter contact information for both the sponsor's Technical and Administrative Contacts. At a minimum, the technical contact's information is required.

#### **Sponsor Contacts**

Technical Contact Name:

Technical Contact Email:

Technical Contact Phone:

Administrative Contact Name:

Optional

Administrative Contact Email:

Optional

Administrative Contact Phone:

Optional

### ***Submission Information***

This section allows you (in non-industry, federal flow-through, or international cases) to choose an OSP Contracting Officer, and also describes how the proposal will be submitted.

Contracting Officer or Team:

Please visit: [OSP or Industry Engagement sites](#).

[Link to Industry Engagement](#)  
[Link to OSP Directory](#)

OSP Instructions:

Optional

0/2000

Preferred Submission Method:

- ☐ Electronic  
☐ Email  
☐ Express Courier  
☐ Hand Delivery  
☐ Mail

Certain options will prompt additional information.

- **Electronic** - Select the electronic system that will be used to submit the proposal.

Preferred Submission Method:

☒ Electronic

☒ Cayuse

Link to Proposal Package:

☐ nSpire

☐ Fastlane

☐ Proposal Central

☐ Other

If the proposal will be submitted via Cayuse, put a link to the Cayuse package here.

- **Email** - Enter the e-mail address to which the proposal should be sent.
- **Express Courier** - Enter the Courier Name, the account to be charged, finance personnel who will approve the charges.
- **Hand Delivery** - Enter the address to which the proposal should be delivered.
- **Mail** - Enter the contact info and address to which the proposal should be mailed.

**For industry sponsors, special care is needed to ensure the proposal is assigned to the correct team. eRouting has been set up to automatically assign an industry proposal either to the International and Corporate Contracting team when the company is using non-Federal funds or to the Federal Flow-Through team when the company is using Federal funds.**

As seen below, when an industry sponsor is chosen and the Prime Sponsor question is indicated as “No”, then the proposal is automatically assigned to the Corporate and International Contracting team to then further assign directly to a CO and be processed:

**Sponsor**

Sponsor:

☐ The Sponsor is not located or is new to GA Tech.

Due Date to Sponsor:

Time Due:

Mailing Address:

Sponsor Contract Number:

Optional

**Prime Sponsor**

Is there a Prime Sponsor for this proposal?

☐ Yes ☒ No

However, when the Prime Sponsor question is indicated as “Yes” and a Federal Government entity is entered in the field, then the proposal is assigned to the Federal Flow-Through Group in OSP for further assignment and processing.

While the assignment of specific COs within these groups usually occurs promptly, there is some effort expended to accomplish this, and further effort is needed when the proposal needs to be transferred from one group to another, so attention to sponsor data detail is needed in order to minimize the time and effort needed to correct this oversight.



## Sponsor

Sponsor: ?

BOEING AEROSPACE COMPANY/

☐ The Sponsor is not located or is new to GA Tech.

Due Date to Sponsor: ?

5/7/2018

Time Due:

8:00 AM

Mailing Address:

1 Main Street  
Atlanta, GA

25/250 Characters

Sponsor Contract Number:

Optional

## Prime Sponsor

Is there a Prime Sponsor for this proposal?

☒ Yes ☐ No

Prime Sponsor: ?

AIR FORCE/AIR FORCE RESH LAB/ROME, NY

## Proposal Routing Sheet Submission

Contracting Officer: Industry Engagement (IE) Group

Please visit OSP or Industry Engagement sites.

[Link to Industry Engagement](#)

[Link to OSP Directory](#)

OSP Instructions:

Optional

0/2000

## F&A Rates and Overhead

In this section, you will choose which F&A or Indirect Cost Rate applies to this proposal.

### Proposal Rates

Rate used for this proposal:

Select Rate

[Link to F&A Rates](#)

### F&A Supporting Documents

Upload F&A Supporting Documents:

Do not upload Classified or Confidential documents.

Click to select files or drop here to upload...

- Research Capped (on and off campus)
- Research Uncapped (on and off campus)
- Industry
- Instruction
- Other Sponsored Activities (OSA)\*
- State of Georgia
- Other\*
- Research Gift

If you choose any of the standard rates (those that don't have an \* next to them), you are not required to upload any additional documentation.

## Other Sponsored Activities

### Proposal Rates

Rate used for this proposal:

Other Sponsored Activities (OSA)

[Link to F&A Rates](#)

Please provide an additional explanation below. You can also add an attachment regarding this rate request.

0/1000

Please attach Technical Proposal/SOW and Formal Budget/Cost before requesting an OSA rate.

Request OSA Rate Approval

If you select the Other Sponsored Activities (OSA) rate, you must receive approval from the Associate Vice President for Research Administration. OSA Rate approval is requested prior to a full submission of the routing form. You are encouraged to request approval as early as possible so it may be reviewed by the responsible parties.

In order to request 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.

### Other Rate Requests:

This feature allows you to request a rate other than one of our standard, negotiated rates. There are a few scenarios when this option will be used.

### Proposal Rates

Rate used for this proposal:

Other

[Link to F&A Rates](#)

Please indicate what you are requesting:

☐ Federally Mandated Published Rate

☐ U.S. Non-Profit Published Rate

☐ AMAC Rate

☐ Membership

☐ Other Rate

- Federally Mandated Published Rate - You are applying to a federal sponsor and the solicitation for this proposal requires the use of 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.

- **US Non-Profit Published Rate** - You are applying to a US-based Non-Profit and the solicitation or program guidelines require the use of 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.
- **AMAC Rate** - If you are submitted a proposal through the Accessibility Solutions and Research Center, you may select this option to use the appropriate rate.
- **Membership** - If the proposal is for the purpose of processing a membership in a GT center through the Office of Industry Engagement that has a unique F&A rate, then choose this option.
- **Other** - If your proposal does not fall under any of the above categories and you would still like to request a lower rate, you may select other. You must enter a justification and your requested rate. All requests submitted with this option **MUST** be approved by the Executive Vice President for Research's Office. **Note:** The EVPR's office approves overhead reductions or waivers only in rare and exceptional circumstances. Prior to submitting a waiver request, consult your unit finance manager, grants administrator, and/or Associate Dean for Research. They will provide guidance as to whether or not the request is reasonable.

Rate used for this proposal:

Other

[Link to F&A Rates](#)

Please indicate what you are requesting:

☐ Federally Mandated Published Rate

☐ U.S. Non-Profit Published Rate

☐ AMAC Rate

☒ Other Rate

Overhead Rate % Requested:

Waiver Justification:

0/1000

## Special Review Checklist

The Special Review Checklist is one of the most important parts of the routing form. It signals any additional reviews your proposal may need before it is submitted.

### Research Integrity

#### Research Integrity

- |                           |                          |   |
|---------------------------|--------------------------|---|
| <input type="radio"/> Yes | <input type="radio"/> No | Human Subject Research?                   |
| <input type="radio"/> Yes | <input type="radio"/> No | Is there a SIRB (Single IRB) requirement? |
| <input type="radio"/> Yes | <input type="radio"/> No | Is Georgia Tech the designated SIRB?      |
| <input type="radio"/> Yes | <input type="radio"/> No | Vertebrate Animals?                       |
| <input type="radio"/> Yes | <input type="radio"/> No | Recombinant DNA?                          |

If you are working with Human Subjects, Vertebrate Animals, or Recombinant DNA, select the appropriate box above. If you select yes, a contracting officer will request a deferral from the appropriate office before submitting your proposal.

## Award Administration

This section will alert the Contracting Officer of additional factors that may need additional attention.

### Award Administration

- ☐ Yes    ☐ No    Does anyone who will work on this project participate in a Foreign Government Talent Recruitment Program?
- ☐ Yes    ☐ No    Professional Education Program
- ☒ Yes    ☐ No    Are Sub award(s) proposed?

Upload Sub award Budget/Letter of Commitment from your potential sub awardee:



DO NOT upload any materials designated as classified or contain sensitive PII data.

Click to select files or drop here to upload.

Please attach Budget and/or Letter of Commitment. You can upload it here or on the Attachments Page.

- ☒ Yes    ☐ No    Is the Sponsor/Prime sponsor NSF, NIH or NIFA?
- ☐ 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 establishment of an award.
- ☐ Yes    ☐ No    Does a Teaming Agreement exist for this effort?
- ☒ Yes    ☐ No    Does this proposal require a Material Transfer Agreement with a 3rd party?
- You must create your MTA Request via eRouting.
- ☐ Yes    ☐ No    Is there an Non-Disclosure Agreement (NDA) or Proprietary Information Agreement (PIA) in place for this proposal?

### Material Transfer Agreement (MTA)

If your proposal involves a Material Transfer Agreement, select yes and enter the name(s) of the involved entities.

### Subawards

If your proposal involves subawards to other institutions, you are required to upload a letter of commitment and budget from each subawardee.

### Responsible Conduct of Research Requirements

If your proposal is sponsored by NSF, NIH, or NIFA, it may require a responsible conduct of research education plan. Please certify that you will comply with the Institute's RCR Compliance Policy as well as meet the Sponsor's requirements:

- ☒ Yes    ☐ No    Is the Sponsor/Prime sponsor NSF, NIH or NIFA?
- ☐ 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 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.

## Teaming Agreements

☒ Yes    ☐ No

Does a Teaming Agreement exist for this effort?

**Team Members:**

You can enter multiple Team Members separated by a comma.

**If known, please enter DocID:**

Optional You can enter multiple Doc ID's separated by a comma.

**Upload Teaming Agreement:**

Do not upload Classified or Confidential documents.

Click to select files or drop here to upload.

Please attach Teaming Agreement. You can upload it here or on the Attachments Page.

If your proposal involves a teaming agreement, please list the team members and any associated DocIDs, and upload a copy of that agreement.

## Export Control

If your proposal involves a foreign sponsor, export of materials to a foreign country or foreign persons, potential publication restrictions, or any information subject to EAR or ITAR, please answer yes to the appropriate question. Depending on the situation, Export Control will be alerted via e-mail.

### Export Control

☒ Yes    ☐ No

Will proposal be submitted to a foreign sponsor (Prime or Sponsoring Organization)?

PI: You will receive an Export Control notification with a link via email to complete the required Export Certification.

☒ Yes    ☐ No

Does research involve export of items or technology (e.g. shipment to another country, OR international collaborator, OR international sub-agreement, OR activity will be performed in whole or in part outside the U.S.A.)?

PI: No action is required at this time. This activity will be reviewed by Export Control prior to acceptance of an Award.

☒ Yes    ☐ No

Do any of the Proposal documents include technical data subject to the Department of State, [International Traffic in Arms Regulations](#) (ITAR)?

PI: Documents must be marked with appropriate access and dissemination security markings before uploading to eRouting.

☒ Yes    ☐ No

Is the agreement anticipated to contain any of the following: Restrictions on Dissemination (Publication Restriction or Approval) or Restrictions on Access (Foreign National Restriction or Approval or Notification), or other Security controls?

PI: No action is required at this time. This activity will be reviewed by Export Control prior to acceptance of an Award.

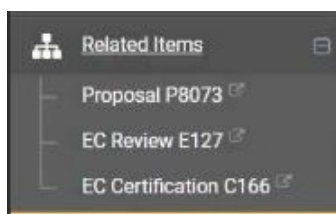
☒ Yes    ☐ No

Is the research anticipated to access, use, create or generate technical data or hardware subject to the Department of State, [International Traffic in Arms Regulations](#) (ITAR); or Controlled Unclassified Information (CUI-EXPT or CUI-EXPTR); or data marked with Distribution Statements B-F; or X); or Classified activities or data?

PI: No action is required at this time. This activity will be reviewed by Export Control prior to acceptance of an Award.

If you answer **yes** to Question 1 in the Export Control section, after the routing sheet has been fully approved via departmental workflow and the status bar shifts to "In Sponsored Programs" (as noted below), you would be able to see that an EC Review and EC Certification was created and accessible via Related Items:





Once the Export Control review is complete, you will note the status change from “Export Control Created” to “Export Control Review Completed”:

For additional assistance, please see the **Export Control Module User Guide**:



[https://researchintegrity.gatech.edu/sites/default/files/documents/user\\_guide\\_export\\_control\\_erouting\\_module.pdf](https://researchintegrity.gatech.edu/sites/default/files/documents/user_guide_export_control_erouting_module.pdf) and contact the Export Control Team at [export@gatech.edu](mailto:export@gatech.edu).

### IT & Infrastructure

#### IT & Infrastructure

- ☐ Yes ☐ No IT infrastructure: Does this project propose the acquisition of any new:
1. Computational resources beyond a standard desktop or laptop (e.g. servers, clusters, high-end workstations, HPC, or cloud computing services).
  2. Data storage greater than a standard PC disk (e.g. disk array, high capacity cloud storage).
  3. Lab equipment, software, or services that require dedicated computing resources.
- ☐ Yes ☐ No Physical infrastructure: Does this project propose or require the modification or construction of Georgia Tech facilities or infrastructure?

Select yes on Q1 if this project proposes the acquisition of any new:

1. Computational resources beyond a standard desktop or laptop (e.g. servers, clusters, high-end workstations, HPC, or cloud computing services).
2. Data storage greater than a standard PC disk (e.g. disk array, high capacity cloud storage).
3. Lab equipment, software, or services that require dedicated computing resources.

If not, select No.

Select yes on Q2 if this project proposes or requires the modification or construction of Georgia Tech facilities or infrastructure.

If not, select No.

Click Save or Save and Continue

### Environmental Health and Safety (EHS)

If your research involves any hazards, please select the appropriate box(es) on this page. You will be prompted to fill in additional information depending on what hazards are involved. Detailed help is built into this section and can be accessed by clicking on the question mark prompts.

If there are no hazards anticipated, you can go directly to the bottom of the page and click



☒ EHS Hazards Not Applicable for this proposal

## Organizational Conflict of Interest

### Organizational Conflict of Interest

Organizational Conflict of Interest (OCI) is a federal procurement regulation (FAR 9.5). The clause is designed to ensure that government contractors (meaning Georgia Tech, not individual faculty or staff) do not have an unfair competitive advantage; or 2) impaired objectivity.

<input checked="" type="radio"/> Yes	<input type="radio"/> No	Does the solicitation/program guidance/master agreement associated with this proposal include any reference to Organizational Conflict of Interest (OCI)?
<input checked="" type="radio"/> Yes	<input type="radio"/> No	Is this submission in response to (or a support of a response to) an open/publicly competed funding opportunity?
<input type="radio"/> Yes	<input type="radio"/> No	Did you or anyone else that you know of at Georgia Tech have any part in developing this solicitation?
<input type="radio"/> Yes	<input type="radio"/> No	Did you or anyone else that you know of at Georgia Tech have any advanced or unfair knowledge about this funding opportunity that would not have been available to other competing respondents?
<input type="radio"/> Yes	<input type="radio"/> No	Under this scope of work (SOW) do you foresee Georgia Tech acting in an advisory capacity to the government/sponsor?
<input type="radio"/> Yes	<input type="radio"/> No	Under this SOW do you foresee Georgia Tech being involved in evaluating Georgia Tech products against other competitors' products to advise the government/sponsor on which products to purchase or which technologies to pursue?
<input type="radio"/> Yes	<input type="radio"/> No	Under this SOW do you foresee Georgia Tech gaining access to any proprietary information from potential future competitors in this space?
<input type="radio"/> Yes	<input type="radio"/> No	Under this SOW do you foresee Georgia Tech assisting the government/sponsor in developing a solicitation (requirements/selection criteria) for a potential follow-on funding opportunity?
<input type="radio"/> Yes	<input type="radio"/> No	Was GTRI involved in any way with this proposal and/or do you foresee GTRI as playing any role in delivering the services under this SOW?

#### OCI Search

To determine if OCI is mentioned, open the solicitation, program guidance, or master agreement and search for the term "conflict". Review each instance to determine if it relates to the definition above.

Please provide additional information you wish to share about any of your responses above:

0/4000

If your proposal requires an Organizational Conflict of Interest Representation or Certification, select yes and include the solicitation, answering all of the additional unfolding questions that are then provided. Include the RFP attachment when users select "Yes" for the OCI question, and when RFP/RFA or Solicitation Number is empty.

OCI has become invoked much more broadly

- Increasing number of sponsors/sponsor types
- Variety of interpretations
- Even in non-FAR governed agreements (like OTAs)

Almost always: DOD, DARPA, IARPA, ARPA-H, FDA, DOE

- DARPA – unique University Affiliated Research Center (UARC) restriction
  - UARCs cannot respond as prime or sub to a BAA (with rare exceptions)
  - GTRI is a UARC
  - Academic side can compete for this work, but only if GTRI is not involved

Requires we disclose and conduct a full OCI review

Upon learning of intent to pursue an opportunity, review the following items to determine if there is a need for an OCI **review and advise the PI** of required actions

- Solicitation (Primary)
- Any related BAAs/Program Guidance
- Any related Master Research Agreements

Questions about OCI?

- Review [Organizational Conflict of Interest \(OCI\)](#) webpage

Contact [Susan Roche](#) (Academic) / [Ron Bohlander](#) (GTRI)

## Conflict of Interest and Intellectual Property

***\*THIS SECTION MUST BE ANSWERED BY THE PI and any Co-PIs\****

Each PI or Co-PI must answer the following questions about a financial conflict of interest and intellectual property. Answering yes will notify the appropriate office for additional review.

**Conflict of Interest**

☐ Yes    ☐ No

Do you, your spouse, domestic partner, or minor dependents:
 

- Receive compensation from a company/entity related to this research (do not include salary, grant support, and other payments for services from Georgia Tech)?
- Receive royalty or licensing payments from a company/entity related to this research?
- Have any intellectual property rights in any technology being used in this research?
- Receive gifts/benefits, including reimbursed or sponsored travel, from a company/entity related to this research?
- Have equity or ownership interest (includes stock options) in a public or private company/entity related to this research?
- Be a director, officer, partner, trustee, employee, or hold any other type of management position with a company/entity related to this research?
- Receive any compensation whose value could be affected by the outcome of this research (excluding compensation paid from the research grant)?

☐ Yes    ☐ No

Are you aware of any potential conflicts for other key personnel, consultants, or subcontractors?

**Intellectual Property**

☐ Yes    ☐ No

Will you be utilizing any pre-existing IP, that you have developed or that another GT researcher has developed, during the course of this project? Ex: novel methods, materials, inventions. ⓘ

☐ Yes    ☐ No


Are you utilizing any background IP from a third party? Ex: novel methods, materials, inventions, confidential. ⓘ

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.



## Attachments

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


Do not upload any materials or documents designated as CUI, classified, or confidential.

Click to select files or drop here to upload.

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):

Do not upload Classified or Confidential documents.

Click to select files or drop here to upload

File: <small>eRouting Budget Justification.doc</small>	Description: <input type="text" value="Halley-Budget Justification"/>	Document Type: <div>Budget Justification ▾</div>	Upload attachment as: <input checked="" type="radio"/> Active <input type="radio"/> Archive <span style="color: #c00000;">✕</span>
File: <small>eRouting Demo Budget.xlsx</small>	Description: <input type="text" value="Halley-Budget"/>	Document Type: <div>Formal Budget/Cost ▾</div>	Upload attachment as: <input checked="" type="radio"/> Active <input type="radio"/> Archive <span style="color: #c00000;">✕</span>
File: <small>eRouting Demo Technical Proposal.docx</small>	Description: <input type="text" value="Halley-Project Summary"/>	Document Type: <div>Technical Proposal ▾</div>	Upload attachment as: <input checked="" type="radio"/> Active <input type="radio"/> Archive <span style="color: #c00000;">✕</span>
File: <small>rcrAddendum-with fields.pdf</small>	Description: <input type="text" value="Halley-RCR"/>	Document Type: <div>RCR Addendum ▾</div>	Upload attachment as: <input checked="" type="radio"/> Active <input type="radio"/> Archive <span style="color: #c00000;">✕</span>

Upload files

### Active Attachments

Documents included in OSP Package.

Document Name	Document Description	Document Category	Uploaded Date	Uploaded By	Last Modified By	Actions
<a href="#">eRouting Budget Justification.doc</a>	Halley-Budget Justification	Budget Justification	3/14/2017 14:12:18	Halley, Kathleen	Halley, Kathleen	  
<a href="#">eRouting Demo Budget.xlsx</a>	Halley-Budget	Formal Budget/Cost	3/14/2017 14:12:18	Halley, Kathleen	Halley, Kathleen	  
<a href="#">eRouting Demo Technical Proposal.docx</a>	Halley-Project Summary	Technical Proposal	3/14/2017 14:12:18	Halley, Kathleen	Halley, Kathleen	  

### Archived Attachments

Documents not included in OSP Package.

Document Name	Document Description	Document Category	Uploaded Date	Uploaded By	Last Modified By	Actions
<a href="#">rcrAddendum-with fields.pdf</a>	Halley-RCR	RCR Addendum	3/14/2017 14:12:18	Halley, Kathleen	Halley, Kathleen	 

***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 your documentation only and will not be visible to OSP.

Available Attachment 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/SOW** – 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.**

## History

**Add Comments:** You may use this feature to add comments to a proposal record at any time. You may also send comments to specific users by selecting specific recipients. Be sure to click the green add button to add a recipient to the list.

**Request Clarification:** This feature can be used to request clarification about certain information on a routing sheet. It will be sent to any recipient you add. Be sure to click the green add button to add a recipient to the list.

### Add Comments/Request Clarification

Your comments will be logged in the history below. To email these comments, please include a recipient.

Comments:

0/2000 Characters

Select Recipient(s):

Type Employee's Last Name or First Name

Optional

Add

Log Comment

## Take Actions/Submit for Approvals

### Submission

Once you have filled out the entire routing form and uploaded the appropriate attachments, you will go to the take actions tab to submit the proposal. **If you are not the PI, submitting the routing sheet will route the proposal to the PI for review and approval.**

### Certify and Submit Proposal RS

- ☒ I certify the following:
- The information submitted within the application is true, complete and accurate to the best of my knowledge;
  - Any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.
  - I agree to accept responsibility for the scientific & technical conduct of the project and to provide the required progress or technical reports if a grant or contract is awarded as a result of the application.
  - If an award is made as a result of this proposal, I will administer it in accordance with the policies of the sponsor and of Georgia Tech as applicable.
  - I certify that I have read and understand the Institute's conflict of interest policy all required financial disclosures were made; and I will comply with any conditions or restrictions imposed by the Institute to manage, reduce, or eliminate conflicts of interest.

Submit

### Approval

If you are listed as an approver on a proposal routing sheet, you will also use the Take Actions tab to route the proposal to the next level. When you click on the tab, you will be able to see any actions you need to perform.

You may enter any comments and then click approve to send the proposal to the next approver. 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.

**BO/Grants Admin Approval**

Comments:

Optional

0/2000 Characters

Approve

Here are some other features of the **Take Actions** tab. Only actions that apply to your current proposal routing sheet will appear.

**Optional Actions**

- ▶ Add Comments/Request Clarification
- Reassign PD/PI
- View Routing Sheet
- Withdraw Routing Sheet

**Add Comments/Request Clarification**

Comments:

0/2000 Characters

Select Recipient(s):

Type Employee's Last Name or First Name

Optional

Add

Add Comments/Send

**Request Additional Signatures:** If a proposal needs review outside of a School or Department's regular workflow, you may request additional signatures on a proposal-by-proposal basis. Be sure to click the green add button to add a recipient to the list.

**Make Corrections to RS:** Before a proposal is submitted to OSP, anyone in the approval chain can make corrections to the following fields:

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

**Pull Back Routing Sheet:** If you need to change any fields that might affect the routing workflow (budget, sponsor, etc.) you may pull back the routing sheet and make those changes. This will require the proposal to be rerouted through the workflow based on the new requirements.

**Withdraw Routing Sheet:** Use this option if you decide not to submit a proposal after submission to OSP. However, the routing sheet cannot be resubmitted if withdrawn.

**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.

## Required Approvals

After the proposal routing sheet has been submitted, the Required Approvals tab will appear. You will see a table that details each level of approval based on the workflow set up by your School or Department. **Be sure to keep your unit's approval chain up-to-date!**

### Required Approvals

Approver Role	Approver Name	Approved Date and Time	Status	Certification
PD/PI	Halley- Octa, Kathleen Meaghen	7/6/2017 11:44:11	Approved ✓	
BO/Grants Admin			Currently Assigned to: Khan, Kadean, Schlag, Leslie Jeanne, Sundaram, Sudagar, Babykin, Deborah L, Carrau, Alejandra (Sandra), D'Urbano, Christopher, Halley- Octa, Kathleen Meaghen	
Contracting Officer				

If you have requested additional (ad-hoc) signatures, they will show up in a separate table.

► Add Comments

Request Clarification

Request Additional Signatures

Request OSA

Request OCI

Request OW

Withdraw RS

Request IRB Deferral

Request IACUC Deferral

### Add Comments

Comments:

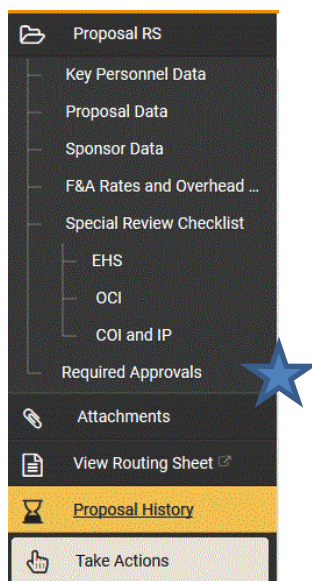
0/2000 Characters

Select Recipient(s):

Optional

There are times when it appears that the proposal seems to be hung up between the PI's approval and the receipt by OSP. Most of the time it's due to an unforeseen approval rather than a bug in the system. It is helpful to check a couple of sections within eRouting for the proposal in question to discover the issue.

On the left side of the page is the gray navigation menu, it is recommended that you first click on Required Approvals and then:



You can then see all of the required approvers for this proposal and when/if each approver has completed their review and approval:

#### Required Approvals

Approver Role	Approver Name	Approved Date and Time	Status	Certification
PD/PI		11/15/2017 09:15:25	Approved ✓	
EVPR Overhead Waiver			Currently Assigned to: Tavares, Monique D, Spatt, Gail D	
EVPR OCI			Currently Assigned to: Broadwell, Martin, Spatt, Gail D, Tavares, Monique D	
Co-PD/PI		11/17/2017 10:30:47	Approved ✓	Q1: N Q2: N
Co-PD/PI			Currently Assigned to:	
BO/Grants Admin				
School Chair/IRI Director				
Contracting Officer				

#### Proposal History

Action Taken	Comments	Action Date and Time	Action Performed By
Proposal Routing Sheet Submitted to Sponsor	Automatically marked it as Submitted to Sponsor based on the status change in OSP	12/07/2017 05:01:09 PM	eRouting System
Proposal Routing Sheet Accepted by CO	This came through the e-routing system after my receipt of proposal documents via email and following my submission to sponsor, thus already submitted to sponsor prior to this e-routing acceptance.	12/07/2017 01:03:30 PM	
Proposal Routing Sheet Submitted for OSP CO Approval		09/27/2017 11:36:23 AM	eRouting System
Proposal Routing Sheet Approved by BO/Grants Admin		09/27/2017 11:36:21 AM	
Proposal Routing Sheet Submitted for BO/Grants Admin Approval		09/27/2017 11:34:52 AM	eRouting System
Proposal Routing Sheet Approved by PD/PI		09/27/2017 11:34:50 AM	
Proposal Routing Sheet Submitted for PD/PI Approval		09/27/2017 11:06:37 AM	
Proposal Routing Sheet Created		09/27/2017 09:04:34 AM	

## Modifications

Modifications work similarly to new proposals with a few small differences. First, enter the Workday award number or prime grant #, or the old PeopleSoft (or CostPoint for GTRI) fund or project number for an existing award. Partial award, grant, fund, or project numbers will bring up all matching awards/projects.

### Search for Modifications/Renewals

Please select your search option

☐ Award/Fund #
 ☐ Prime Grant #/P/S Project #
 ☐ BOA #

Then select “Create” next to the award or project you wish to modify. eRouting will pull in some information about the award/project from the OSP Contract Information System.

Please select your search option

☒ Award/Fund #
 ☐ Prime Grant #/P/S Project #
 ☐ BOA #

Award/Fund #:

Drag a column header and drop it here to group by that column

Modification/Renewal	Doc ID	Prime Grant #/P/S Project #	Award/Fund #	Title	Sponsor
<input checked="" type="button" value="Create"/>	67538	510	R2595	JOSEPH FORD PAPERS - PROCESSING GRANT	AMERICAN INSTITUTE OF PHYSICS/NEW YORK, NY
<input type="button" value="Create"/>	77602	5106603	R3236	PRESERVATION ASSESSMENT GRANT	NATIONAL FOUNDATION ON THE ARTS & HUMANITIES/NATL ENDOWMENT FOR THE HUMANITIES
<input type="button" value="Create"/>	80643	5106604	R3332	PAPERS OF DR. MEL KRANZBERG	GEORGIA STATE ARCHIVES/ATLANTA, GA

Next, choose what kind of modification you would like to make. One or more options may apply.

### Reason(s) for Modification/Renewal

☒ **Change in Budget/Funding**

Additional Proposed Amount:

\$

Awarded Amount:

\$ 1,260,000.00

☒ **Change in Timeline**

Revised Estimated End Date:

MM/DD/YYYY

Awarded Start and End Dates:

1/1/1996 1/1/2020

☐ **Change in Scope**

- Change in Budget/Funding:** Use this option for any supplements or additional funding. Enter the amount of the supplement in the Additional Proposed Amount field.
- Change in Timeline:** If you need additional time to complete the project, use this option. Enter the revised end date.
- Change in Scope:** If you are adding or removing tasks from the scope of work, use this option. You will be prompted to upload a new scope of work for the project.

From this point, all fields are the same as the routing sheet for new projects.



## Cloning a Routing Sheet

If you work with similar sponsors, you may want to use the Clone a Routing Sheet feature. Start by searching for the routing sheet you would like to clone.

Clone Proposal Routing Sheet Naranje Davis

Proposal ID:	Proposal Status: Select a Proposal Status	Proposal Title:	PD/PI Dept Org ID:
PD/PI:	Initiator:	Assigned Contracting Officer: Select an Assigned Contracting Officer	Sponsor:
Sponsor Due Date From:	Sponsor Due Date To:	Prime Grant #/P/S Project #:	Award/Fund #:
Proposal Home Department:	Proposal Type: Select Proposal Type		

Click the **green** button to clone a routing sheet.

Here are fields that will **not** be cloned:

- PD/PI and Co-PD/PI Information
- Initiator and Lead Admin POC
- Proposal ID
- Proposal Home Department (PHD)
- Proposal Title
- Total Amount Proposed
- Due Date to (Sponsor)
- Due Time to Sponsor
- Due Date to (Prime Sponsor)
- Due Date to Prime Sponsor
- Special Review Checklist
- Assigned CO
- Estimated Start Date
- Estimated End Date
- Estimated Length
- Attachments
- Comments

**Note:** Only the Initiator and PDPI can clone, and Official Proposals (once they are submitted to OSP are not cloneable for both RI and GTRI proposals.