

ERCM MINI RELEASE NOTES

eRouting

- (ER-4505) In eRouting, the **Contracting Officer** field in the Header will update to match the Contracting Officer that is assigned on the **Manage Opportunities --> Team** tab in CM. The **Proposed Contracting Officer** field was added to show the CO that was selected in eRouting. Note: If the CO is changed in CM, it does not update immediately in eRouting. A job runs every 2 hours to update the field in eRouting.

The screenshot displays the eRouting interface for proposal P30064. At the top, a progress bar shows four stages: 'Proposal Routing Preparation' (checked), 'Proposal Routing Approvals' (checked), 'In Sponsored Programs' (selected), and 'In Final Disposition' (disabled). Below this, the proposal ID 'P30064' and title 'test' are shown, along with the proposer 'ADVANTEST AMERICA INC./BALDWIN PARK, CA | Zum, David G (PD/PI)' and creation details. A yellow box contains key information: 'Proposal Home Department: GTRI-ELSYS-TEN', 'Proposed Award Type: Contract Vehicle (IDIQ / MRA / BOA)', 'Total Amount Proposed:', 'Proposed Contracting Officer: Industry Engagement (IE) Group', and 'Contracting Officer: Kruzan, Steffanie'. To the right, dates for 'Estimated Start Date', 'Estimated End Date', 'Due Date to Sponsor', and 'Time Due' are listed. A message prompts the user to navigate to the History Page for comments or requests. Below this is the 'Manage Opportunities' section with search filters and tabs for General, Status, Compliance, RFP Info, Team, and others. The 'Team' tab is active, showing a table of personnel.

Employee *	Name	Title	ORCID	Role *	Role Description	Start Date *	End Date	Key Personnel
3518039	Zum, David G	Regents Researcher		PDPI	Project Director/Principal Investigator(PDPI)	06/10/2025		<input type="checkbox"/>
3518039	Zum, David G	Regents Researcher		PROPM	Proposal Manager	06/10/2025		<input type="checkbox"/>
3595310	Kruzan, Steffanie	Research Associate I		CO	Contracting Officer	07/24/2025		<input type="checkbox"/>

eRouting and Contract Management

- (ERCM-32)/(ERCM-41)

In eRouting--> **Proposal Routing Sheet** --> **Special Review Checklist**-->**Office of the General Counsel Export Control** all export questions and answers will be passed to CM.

ERCM MINI RELEASE NOTES

Proposal Routing Sheet: Special Review Checklist

P30033
Release 18 Testing - CRADA
3M ADVANCED MATERIALS DIVISION/ST. PAUL, MN | McGrade, Brian P (PD/PI) | [Less Proposal Info](#)

Proposal Home Department: R&D
Proposed Award Type: CRADA
Total Amount Proposed: \$1.00
Proposed Contracting Officer: Industry Engagement (IE) Group
Contracting Officer: Boyd, Angela D.
PID: 411296

Estimated Start Date: 7/1/2025
Estimated End Date: 7/1/2025
Due Date to Sponsor: 8/19/2025
Time Due: 8:00 AM
Due ID: 221284
Prime Grant #/PIS Project #:

Research Integrity

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

Award Administration

<input type="radio"/> Yes	<input checked="" type="radio"/> No	Does anyone who will work on this project participate in a Foreign Government Talent Recruitment Program?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Professional Education Program
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Are Sub award(s) proposed?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Is the Sponsor/Prime sponsor NSF, NIH or NIFA?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Does a Teaming Agreement exist for this effort?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Does this proposal require a Material Transfer Agreement with a 3rd party?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Is there an Non-Disclosure Agreement (NDA) or Proprietary Information Agreement (PIA) in place for this proposal?

Office of the General Counsel Export Control

<input type="radio"/> Yes	<input checked="" type="radio"/> No	Will proposal be submitted to a foreign sponsor (Prime or Sponsoring Organization)?
<input type="radio"/> Yes	<input checked="" type="radio"/> 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.)?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Do any of the Proposal documents include technical data subject to the Department of State, International Traffic in Arms Regulations (ITAR)?
<input type="radio"/> Yes	<input checked="" type="radio"/> 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?
<input type="radio"/> Yes	<input checked="" type="radio"/> 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-EXPTTR); or data marked with Distribution Statements B-F, or X; or Classified activities or data?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Other

In **Opportunities**-->**Compliance** tab, a new section has been created to capture all questions and responses related to Export Control from the Special Review Checklist in eRouting. These values will be passed from eRouting to CM.

General Status Compliance RFP Info Team Opp Additional Data Financial Data Considerations

Export Review

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

Export Review Requested Received Decision

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.)?

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

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?

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-EXPTTR); or data marked with Distribution Statements B-F, or X; or Classified activities or data?

Other

Other Reason for Office of the General Counsel Export Review:

Contract Management

- (CMS-4425) In **Opportunities** and **Contracts**--> **Query Search by Document ID** has been optimized to deliver accurate results.

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Manage Opportunities

Find

Query

Sort

Saved Queries

Query Condition

and

Document ID

begins with

(like%)

+

Return all records where:

☐ Match case of values

Count

Save Query

Reset

Query

Close

EXCHANGE AGREEMENT RELEASE NOTES

Exchange Agreement Enhancements

- (CMS-4363) (CMS-4224) (CMS-4372) (CMS-4362) Legacy data from 2018 onward was loaded into Contract Management for NDA, DUA, and MTA.
- (CMS-4204) In CM, a **Source** field was added to the header for the Manage NDA, Manage DUA, and Manage MTA pages. The **Source** indicates whether the record was initiated in eRouting or was a Legacy record uploaded into CM. The field displays **eRouting** or **Legacy**.

The screenshot shows the 'Manage NDA' form. At the top, there are tabs for 'NDA Request Preparation', 'NDA Submitted', 'Negotiations Completed', and 'In Final Disposition'. Below these, the status is 'Awaiting CO Assignment'. The 'NDA ID' is 'NDA-25-0457', the 'Create Date' is '03/17/2025', and the 'Status' is 'Awaiting CO Assignment'. The 'Source' field is highlighted with a red box and contains the value 'eRouting'. There is a 'Complete' checkbox which is checked.

The screenshot shows the 'Manage NDA' form. At the top, there are tabs for 'NDA Request Preparation', 'NDA Submitted', 'Negotiations Completed', and 'In Final Disposition'. Below these, the status is 'Assigned to CO/In Negotiation'. The 'NDA ID' is 'NDA-21-0294', the 'Create Date' is '11/04/2020', and the 'Status' is 'Assigned to CO/ In Negotiation'. The 'Source' field is highlighted with a red box and contains the value 'Legacy'. There is a 'Complete' checkbox which is unchecked.

- (CMS-4172) (CMS-4374) (CMS-4378) (CMS-4205) (CMS-4207) In CM, a **Complete** checkbox was added to the header of the Manage NDA, Manage DUA, and Manage MTA pages. **Note:** Event email notifications (CO assigned emails and expiration emails) will only go out if the Complete checkbox is checked.
 - Unchecked **Complete** indicates a Legacy record that needs additional information.

The screenshot shows the 'Manage NDA' form. At the top, there are tabs for 'NDA Request Preparation', 'NDA Submitted', 'Negotiations Completed', and 'In Final Disposition'. Below these, the status is 'Assigned to CO/In Negotiation'. The 'NDA ID' is 'NDA-21-0568', the 'Create Date' is '04/01/2021', and the 'Status' is 'Assigned to CO/ In Negotiation'. The 'Source' field is 'Legacy'. The 'Complete' checkbox is highlighted with a red box and is unchecked. Below the form, there is a section for 'PI Information' with fields for 'PI Empl ID', 'PI Name', 'Title', 'Email', 'Department', 'Mail Code', and 'Phone'. At the bottom, there is a 'Manage NDA > History' table with columns for 'Action Taken', 'Comments', 'Action Date and Time', and 'Action Performed By'.

- Once all required information is completed on Legacy records, the user will check the **Complete** checkbox and save the record.

EXCHANGE AGREEMENT RELEASE NOTES

Manage NDA

NDA Request Preparation | NDA Submitted | Negotiations Completed | In Final Disposition

NDA ID * NDA-23-0119 Create Date 08/25/2022 Status Executed Source Legacy ☒ Complete

PI Information Company Information Key Dates Disposition NDA Details

PI Information

PI Empl ID 3077680 PI Name Wright, George

Title Principal Research Engr

Email fred.wright@gti.gatech.edu

Department

Mail Code Phone 4044076343

Manage NDA > History

	Action Taken	Comments	Action Date and Time	Action Performed By
Executed	NDA Expiration Date - 09/31/2023		07/28/2025 01:46:16 PM	Smith, Deshundra
Executed	CO Assigned Date - 08/25/2022		07/28/2025 01:46:16 PM	Smith, Deshundra
Executed	Status changed to Executed		07/28/2025 01:46:16 PM	Smith, Deshundra

- For Exchange Agreements (NDA, DUA, and MTA) initiated in eRouting and sent to CM, the **Source** field will display **eRouting** and the **Complete** checkbox will be checked.

Manage NDA

NDA Request Preparation | NDA Submitted | Negotiations Completed | In Final Disposition

NDA ID * NDA-25-0438 Create Date 03/06/2025 Status Assigned to CO/ In Negotiation Source eRouting ☒ Complete

PI Information Company Information Key Dates Disposition NDA Details

PI Information

PI Empl ID 3531154 PI Name Sulphin, Stanley C

Title Principal Research Engineer

Email stan.sulphin@gti.gatech.edu

Department GTRI-SEAL (010.053)

Mail Code Phone 404/407-7772

- (CMS-4382) (CMS-4180) (CMS-4383) (CMS-4390) In eRouting, **Summary** pages were created for all Exchange Agreements (NDA, DUA, and MTA) Users can view current eRouting and Legacy Exchange Agreements inside eRouting. Note: The **Summary** page is only visible once the record is in CM.

Official NDA Summary

NDA Request Preparation | NDA Submitted | Negotiations Completed | In Final Disposition

NDA Number: NDA-20-0475

Key Personnel

PI/PI Name: Fitzpatrick, Mike

PI/PI Dept: Initiator: Legacy Data

Contracting Officer Name: Puller, Alison

Contracting Officer Email: alison.puller@gsa.gov

Other Party Information

Company Name: Allen Science & Technology

Company City, State, Country

NDA Status

NDA Type

Status: Assigned to CO/ In Negotiation

Effective Date: March 02, 2020

Expiration Date

Confidentiality Obligation Expires

NDA Details

NDA purpose

Subject matter and purpose

Related OT IDs

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EXCHANGE AGREEMENT RELEASE NOTES

For eRouting initiated Exchange Agreements, the Summary page can be accessed via the **Official NDA** → **Official View** link.

eRouting

NDA Routing Form

- NDA Data
- Required Approvals
- Attachments
- Printable View

Official NDA

- Official View**
- History
- FAQ
- Take Actions

Non-Disclosure Agreement: Take Actions

✓ NDA Request Preparation

NDA-25-0392
Van Hentenryck, Pascal (PD/PI) | Created on

[Submit NDA](#)

- (CMS-4455) In eRouting, when viewing a **Summary** page for DUA, NDA, or MTA, the ID for eRouting initiated EAs is a hyperlink back to the form in eRouting.

eRouting

Official NDA Summary

✓ NDA Request Preparation

✓ NDA Submitted

Key Personnel | Other Party Information | **NDA Status** | NDA Details

NDA Information

NDA Number: [NDA-25-0392](#)

Key Personnel

PD/PI Name: Van Hentenryck, Pascal
PD/PI Dept: Industrial & Systems Engr (240)

Note: Legacy records do not have this hyperlink since they are not initiated in eRouting and have no form in eRouting.

eRouting

Official NDA Summary

✓ NDA Request Preparation

● NDA Submitted

Assigned to CO/ In Negotiation

Key Personnel | Other Party Information | **NDA Status** | NDA Details

NDA Information

NDA Number: [NDA-20-0475](#)

Key Personnel

PD/PI Name: Fitzpatrick, Mike
PD/PI Dept:
Initiator: Legacy Data

EXCHANGE AGREEMENT RELEASE NOTES

- (CMS-4389) (CMS-4484) Exchange Agreement COs can search for Legacy records in eRouting by checking the **Legacy** checkbox on the **Search All** pages for NDA, DUA, and MTA.

Search All NDA Requests

Reminder: NDAs, MTAs, and DUAs are specific to each Project. Agreements are not transferrable to other PD/PIs unless a new PD/PI takes over the Project.

Find NDA

NDA ID
NDA-20-0475

Status
Search All Statuses

Home Department
Type Home Department

PD/PI
Type Employee's Last Name or First Name

Initiator
Type Employee's Last Name or First Name

Company's Name
Company's Name

Creation Date From
Creation Date To

Select checkbox to include Legacy records
☒ Legacy
optional.

Clear Search

Export to Excel

NDA Id	Status	Type	Company Name	Initiator	PD/PI	Home Dept
NDA-20-0475	Assigned to CO/ In Negotiation	Legacy	Alion Science & Technology	Legacy, Data	Fitzpatrick, Mike	GTRI-ATAS-DO-DIR-FS