Proposal Routing Sheet Workflow
Email Notifications and Required Approvals
version 8/23/21

Create Routing Sheet → Certify COI & IP statements then Submit → Additional Approval Workflows (as needed) → Final Review

Co-PD/PI
OSA Rate Required → Certify COI & IP statements then Submit → Co-PD/PI Included

PD/PI
Proposal Routing Sheet Workflow
OA Rate Approval – VPRA (required before PD/PI can submit for routing)

If COI and IP Statements are “Yes” email notification sent for review and follow-up

Email notifications sent for review and follow-up:
- Special Review Checklist – IRB, IT and Physical Infrastructure

Export Control section – “Yes” to 1st question creates Export Certification required to be completed by PD/PI in eRouting Module

F&A Rate Waiver: Other, Other Rate (IF required, would flow here 1st then to Dept Workflow Approval)

OCI Required (IF required, would flow here 1st then to Dept Workflow Approval)

Departmental Workflow Approvals (BO/Chair/Dean) NOTE: if PD/PI and Co-PD/PI(s) are in different Dept., would require separate workflow approvals

Professional Education Program (IF approval workflow required will flow here 1st then to CO)

PE Program Required → Final Review prior to Submission to Sponsor