

RELEASE NOTES FOR 1B

eRouting

- (ER-3670) On the RI version of the **Proposal Routing Sheet** on the **Special Review Checklist, Organizational Conflict of Interest** has been updated with new text and questions.
 - If you answer No to question #1, then no further action is needed on this section.
 - If you answer Yes to question #1, then question #2 will appear.
 - If you answer Yes to question #2, then questions #3-9 will appear.
 - If you answer No to question #2, then questions #5-9 will appear.

Proposal Routing Sheet: Special Review Checklist: Organizational Conflict of Interest Brian P. McGlade [PD/P]

Proposal Routing Preparation Proposal RT with PD/P in Initiator Proposal Routing Approvals In Sponsored Programs In Final Disposition

P29801
testing
| McGlade, Brian P (PD/P) | [\(Less Proposal Info\)](#)

Proposal Home Department: IMS
Proposed Award Type:
Total Amount Proposed:
Contracting Officer:

Estimated Start Date:
Estimated End Date:
Due Date to Sponsor:
Time Due: 8:00 AM

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 members) do not have 1) an unfair competitive advantage, or 2) impaired objectivity.

☒ Yes ☐ No Does the solicitation/program guidance/master agreement associated with this proposal include any reference to Organizational Conflict of Interest (OCI)?

☐ Yes ☐ No Is this submission in response to (or a support of a response to) an open/publicly competed funding opportunity?

☐ Yes ☐ No Did you or anyone else that you know of at Georgia Tech have any part in developing this solicitation?

☐ Yes ☐ 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?

☐ Yes ☐ No Under this scope of work (SOW) do you foresee Georgia Tech acting in an advisory capacity to the government/sponsor?

☐ Yes ☐ 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?

☐ Yes ☐ No Under this SOW do you foresee Georgia Tech gaining access to any proprietary information from potential future competitors in this space?

☐ Yes ☐ 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?

☐ Yes ☐ 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?

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

- (ER-4196) On an RI Modification in eRouting, the **Prime Sponsor** is defaulted from the Prime Award.

Contract Information System (CIS) Project Search Proposal Project Deliverables Subagreements

Award Header Budget Billing Deliverables Terms & Conditions Funds Contractual Docs Closeout Docs Sub Agreements Related Links History

Green tab and bar indicate that page data has been modified in this revision.
* Documents open in a new window.
* Some Contract Documents processed prior to June 1, 2004 are not yet available to view.

Available Revisions: [Latest](#) [INIT](#)
Selected Revision: INIT

Award/Fund #: AWD-006181 **Doc ID #:** 207344
Prime Grant #/P/S Project #: GR00027814 **Old P/S Project #:**
OSP Amendment - Award Header Information **Old P/S Fund #:**
Rev #: INIT **Mod #:**
Report Generated on: 6/10/2025 16:45 **Initial Revision Completion Date:** 26-JUN-24

Doc ID #: 207344 **Status:** Active
Award/Fund #: AWD-006181 **Prime Grant #/P/S Project Number:** GR00027814
Cost Share #: **Unit code:** 26
Old P/S Project #: **PeopleSoft Cost Share Id:**
Old Fund Number: **PeopleSoft Cost Share Fund Id:**
BOA #: **Project Type:** RES
Contract #: SUB00004277 **Award Type:** SUBCONTR
Prime #: FA8651-22-F-1052 **Contract Entity:** GTRC
Prime Sponsor: AIR FORCE/AIR FORCE RESH LAB/ROME, NY **Minimum Effort?:** N
Source Doc Id: **Contract Type:** CRNF(Cost Reimbursement No Fee)
CFDA: **Member/Center:**
PE #: **Strategic Res Theme:**

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Sponsor

Sponsor: UNIVERSITY OF FLORIDA

Description of Service Type

You have selected a sponsor that is a COLL type. If a Prime Sponsor exists for this proposal (such as a Federal Government agency) please enter the details in the Prime Sponsor section below

Due Date to Sponsor: 6/26/2025

Time Due: 8:00 AM

Mailing Address:

Sponsor Contract Number:

Optional: 0/200 Characters

Is this a foreign Sponsor?

Yes No

Prime Sponsor

Is there a Prime Sponsor for this proposal?

Yes No

Prime Sponsor: AIR FORCE/AIR FORCE BESH LAB/ROME, NY

Description of Service Type

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

Due Date to Prime Sponsor: 6/24/2025

Time Due: 8:00 AM

- (ER-4402) On the Proposal Routing Sheet for GTRI, when the **Proposed Award Type** is a Specialized Service Agreement (SSA) the **B&P Number** is automatically generated in the Proposal Accounts section.

Proposal Routing Sheet: Proposal Data

David G. Zure (PI/PI)

Proposal Routing Preparation Proposal Routing Approvals In Sponsored Progression In Final Disposition

P29830

test

new | Zure, David G (PI/PI) | Created on: 2025-03-31 16:05:20 888065 | [View Proposal Info](#)

Proposed Award Type: SSA (Specialized Service Agreement)

Total Amount Proposed: \$323,232.00

Contracting Officer: O'Connell, Christopher

Estimated Start Date: 3/12/2025

Estimated End Date: 11/30/2027

Due Date to Sponsor: 4/4/2025

Time Due: 5:00 PM

Proposal

Proposed Award Type: SSA (Specialized Service Agreement)

Description of Service Type

Proposal Award/Classification: New Award

Proposal Accounts

B&P Number: F5SBP70.00.P2.9830

B&P Hours: 23

Optional

Notes:

Optional: 0/500 Characters

- (ER-4445) On the Proposal Routing Sheet in the **BOA Information** section, only BOA Numbers will appear on this list (CRADAs are excluded).

BOA Information

BOA Number

135

BOA Test AW 523 (1354)

Master Research Agreement - ClassOne (1356)

BOA Description:

- (ER-4498) On the Proposal Routing Sheet in the **BOA Information** section, labels have been updated along with new tooltips and help text to provide clarity.

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Estimate Length Type:
☒ Months ☐ Days

BOA Information
BOA Number
Type BOA number or key word from title
☐ The BOA Number is not located

BOA Information
BOA Number
Type BOA number or key word from title
☒ The BOA Number is not located

BOA Information
BOA Number
Type BOA number or key word from title
☒ The BOA Number is not located

BOA Description:

eRouting and Contract Management

- (ER-4362) (CMS-4185) On the Proposal Routing Sheet in the **Contracting Officer or Team** section, a new email group, GTRI Fed Flow Thru Nonprofit Other Federal, has been added to the dropdown list. An early notification email will be sent to the team.

Proposal Routing Sheet Submission

Contracting Officer or Team:
Select a CO
Please visit OSP or Industry Engagement sites.
[Link to OSP Directory](#) This is a required field. Please select.

Preferred Submission Method:
☒ Electronic
☐ Email
☐ Express Courier
☐ Hand Delivery
☐ Mail

OSP Instructions:
Optional 0/2000

Contracting Officer or Team:
Select a CO
Please visit OSP or Industry Engagement sites.
[Link to OSP Directory](#) This is a required field. Please select.

Preferred Submission Method:
☒ Electronic
☐ Email
☐ Express Courier
☐ Hand Delivery
☐ Mail

OSP Instructions:
Optional 0/2000

In Opportunities, the new group will be displayed on the General tab in the **Group Email** field. An email notification will be sent to the group once the proposal has been sent to CM.


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Prospect

Federal Agency			Type	
Prime Sponsor (Federal) Account			Type	
Primary Contact				
Acquisition Agency				
Acquisition Sponsor			Type	
Acquisition Contact				
Lead Contact			Type	
Group Email	GTRI_FFT_NP_OTHFED			

Sample email sent from CM:

Proposal Package has been assigned to a CO Group: P30641

 DoNotReply@gtri.gatech.edu
To: Morganne C Norwood; Shari Brothers; Tara Barker
Wed 6/4/2025 9:46 AM

 We removed extra line breaks from this message.

This email is to inform you that a Proposal (P30641) has been assigned to the CO Group (morganne.norwood@osp.gatech.edu;shari.brothers@osp.gatech.edu;tara.barker@osp.gatech.edu;).
Proposal ID: P30641
Proposal Title: Emory University - Chen/Lin Current PDPI: Chen, Hang Proposal Home Department: IMS(138)
Sponsor: Emory University

You can access the Proposal Package at: https://cp.gtri.gatech.edu/?app=CTMOPP&system=CP10&comp=1&appctx=RCTMOPP_HDR^21758|0|1|C^OPP_ID^1^P30641^0|^
CAUTION: This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

- (CMS-4249) The history log will now capture if compliance reviews were requested in eRouting (by the PDPI/Initiator) or in CM (by the CO). An entry will be added to the History Log indicating the source of the review request.

Manage Opportunities > History Log					Query
	Action Taken	Comments	Action Date and Time	Action Performed By	
	IACUC Requested	IACUC Requested in CM	05/30/2025 08:56:54 AM	Boyd, Abigail	
	Proposal Ready for Review	Proposal Stage Changed to Ready for Review	05/30/2025 08:50:56 AM	CM System	
	CO Add PD/PI	CO Add PD/PI: (McGlade, Brian P)	05/30/2025 08:50:56 AM	CM System	
	Proposal Routing Sheet Successfully Submitted to CM		05/30/2025 08:50:56 AM	eRouting System	
	Export Review Requested in eRouting	Export Review Requested in eRouting	05/30/2025 08:50:55 AM	CM System	
	IBC/BioSafety Requested	IBC/BioSafety Requested in eRouting	05/30/2025 08:50:55 AM	CM System	
	Financial COI Requested	Financial COI Requested in eRouting	05/30/2025 08:50:55 AM	CM System	
	OCI representation and certification is required	I certify to the best of my knowledge, Georgia Tech has no organizational	05/30/2025 08:50:50 AM	Spatt, Gail D	
	Proposal Routing Sheet Approved by School Chair		05/30/2025 08:48:31 AM	McGlade, Brian P	
	Proposal Routing Sheet Submitted for School Chair Approval		05/30/2025 08:47:59 AM	eRouting System	
	Proposal Routing Sheet Approved by BO/Grants Admin		05/30/2025 08:47:57 AM	McGlade, Brian P	

Proposal History

Action Taken	Comments	Action Date and Time	Action Performed By
Export Review Requested	Export Review Requested in CM	06/03/2025 09:25:47 AM	Boyd, Abigail
OHW Requested	OHW Requested in CM	06/03/2025 08:45:08 AM	Boyd, Abigail
Proposal Routing Sheet Submitted to Sponsor	Automatically marked it as Submitted to Sponsor based on the status change in OSP	06/02/2025 12:50:03 PM	eRouting System
Proposal Pending	Proposal Package Submitted to Sponsor	06/02/2025 11:25:28 AM	Boyd, Abigail
Fixed Price Memo Requested	Fixed Price Memo Requested in CM	06/02/2025 11:25:28 AM	Boyd, Abigail
Financial COI Requested	Financial COI Requested in CM	06/02/2025 11:24:06 AM	Boyd, Abigail
Cyber Security Requested	Cyber Security Requested in CM	06/02/2025 11:24:06 AM	Boyd, Abigail
OCI Requested	OCI Requested in CM	06/02/2025 11:24:06 AM	Boyd, Abigail
IBC/BioSafety Requested	IBC/BioSafety Requested in CM	06/02/2025 11:24:06 AM	Boyd, Abigail
IACUC Requested	IACUC Requested in CM	06/02/2025 11:24:06 AM	Boyd, Abigail

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List of compliance reviews recorded in history log:

- OCI (Organizational Conflict of Interest)
- IBC (Biosafety)
- Cyber Security
- Export
- FCOI (Financial Conflict of Interest)
- OHW (Overhead Waiver)
- IRB (Human Subjects)
- IACUC (Animal Subjects)
- Fixed Price Memo

- (ER-4636) On the Opportunities>Status tab, the **OCI Conflict With** field will no longer be passed from eRouting to CM. The full comment will be displayed in the **OCI Comments** field.

OCI Status

☒ OCI Check Complete

OCI Status: MC | Maybe Conflict

Date: 06/04/2025

Completed By: 3530317 | Spatt, Gail

Conflict with: <<This will be blank>>

OCI Requested: -None- | Requested Date: []

OCI Decision: -None- | Received Date: []

OCI Comments: This project may have organizational conflict of interest concerns. These concerns must be addressed by the CO in consultation with the EVPR office and the PD/PI.

Full comment here

Contract Management

- (CMS-3914) (CMS-4146) COs can now submit a help desk request to handle multiple reassignments for PDPIs and COs. These updates can be made based on Employee, Sponsor and/or Primary Home Dept. Also, an option is available to update specific opportunities and/or contracts based on the criteria above. The Research Enterprise Team will handle these requests and let you know once the update is completed.
- (CMS-3943) (CMS-4183) In Contracts> Contract Deliverables subtask, a new field was added to capture the **Award Action Revision #** associated with a deliverable(s). Users will need to manually enter this value for existing and new deliverables. The **Award Action Revision #** *MUST* be associated with an existing Award Action. This value will be displayed in CIS.

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Manage Contracts > Contract Deliverables

Deliverable

Number * 1 ☐ Recurring Template Award Action Revision # 1

Type * OTH Type Name

Description * PROGRESS & FINANCIAL REPORT Original Due Date?

Full Description * PROGRESS & FINANCIAL REPORT

Contract Start Date 08/01/2019
Contract End Date 06/30/2025
Report End Date 10/01/2025

Due Date

Sponsor Due Dt * 10/01/2023

Delivered 09/29/2020

Satisfied 09/29/2020

☒ Satisfied

Recurring Deliverable

Frequent -None-

Begin/End Dates are for the 1st deliverable only

Begin Date * 10/01/2020

End Date 06/30/2023

General **Classification** **Team** **Dates** **Award Actions** **Terms/Conditions** **Intellectual Property** **Restrictive Terms** **Billing**

Identification

Contract Mod ID 001 Revision Number 1 Description * 3/26/15

Project Mod ID Action Type * Adds/Updates Funding

Award Dates

Start Date 09/15/2014 Award Date 03/28/2015 Award Project Type * MAIN

End Date 06/03/2024 Federal Award Date Opportunity ID

Effective Date * 03/28/2015 Fund Types * NEW_NP Funding Sponsor KANSAS STATE UNIVERSITY/MANHATTAN, KS

Rev No (1)	Description of Deliverable	Deliv Id No (2)	Period	Covered	Due Date to Sponsor (3)	Copies reqd	Date Mailed^	Sat^
0	PROGRESS & FINANCIAL REPORT	1	01-OCT-2020	30-JUN-2023	01-OCT-2023	0	29-SEP-2020	Y
0	PROGRESS & FINANCIAL REPORT	2	01-OCT-2021	30-JUN-2024	01-OCT-2024	0	22-SEP-2021	Y
0	PROGRESS & FINANCIAL REPORT	3	01-OCT-2022	30-JUN-2025	01-OCT-2025	0	26-SEP-2022	Y
0	Other Deliverable for Rev #2	7				0		N
0	Deliverable Test for Max Value 10	10				0		N
2	Deliverable Test for Max Value 100	9				0		N
0	Other Deliverable	4				0		N
0	Other Deliverable	5				0		N
1	Deliverable Test	8				0		N
0	Other Deliverable	6				0		N

Note:

- If the Award Action Revision # field is left blank in CM, the Rev No will be displayed as 0 in CIS.
- Deliverables will not be displayed in CIS if an **Award Action Revision #** is entered that does not have a corresponding revision on Award Actions.

➤ (CMS-4098) In Contracts> Contract Deliverables subtask has been updated to prevent Active contracts from being Terminated unless ALL deliverables have been 'Satisfied'. *Please refer to this section in the User Guide on satisfying deliverables.*

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Basic Info

Sponsor Account: 3393 NATIONAL SCIENCE FOUNDATION (NSF)/GENERAL Contract Status: **Terminated**

Prime Sponsor (Federal) Account: Contract Type: GRNF Cost Reimburs

Prime Sponsor Contract No: Costpoint Project Type (GTRI Only): GRNF

Award Type: GRANT CFDA No: Project Type: RES Research

Full Title: Engineering Enzyme Vesicles with Stimuli Responsive Partitioning Behavior for High Reactivity and Simultaneous Product Separation

Contract Vehicle/BOA: Task Order No: Primary Home Dept: 190 Chemical and Biomolecular(190)

Primary Work Location: Subcontract Admin: Acquisition Agency: Cognizant DCAA:

Message(s)

Error(s)
Cannot Terminate until all deliverables are completed.

- (CMS-4221) In Contracts> Contract Deliverables subtask, Help Text has been added to clarify the Begin & End dates for **Reoccurring Deliverables**. When the Reoccurring Template box is checked, Begin & End Dates should be entered for the **first** deliverable only.

Manage Contracts > Contract Deliverables

Deliverable

Number: Reoccurring Template: Award Action Revision #: Contract Start Date:

Type: Type Name: Contract End Date:

Description: Original Due Date?: Report End Date:

Full Description:

Due Date

Sponsor Due Dt: Delivered: Satisfied: ☐ Satisfied

Reoccurring Deliverable

Frequency: **Begin/End Dates are for the 1st deliverable only**

Begin Date: End Date:

- (CMS-4166) In Contracts> Manage Contract Contact subtask has been updated to prevent multiple contact types from being entered. Only one **Active** contact type per contract is allowed.

Manage Contracts > Manage Contract Contact

Title	Contact Type	Address 1	Address 2	Address 3	Email	City	Active
PAYMENT OFFICE	BILL_TO	DFAS-HQ0490	8899 E. 56TH STREET		http://www.dfas.mil/dfas/contractors/vendors.htm	INDIANAPOLIS	Active
GRANTS SPECIALIST	ISSUE	USA.MED RESEARCH ACQ ACTIVITY		820 CHANDLER ST	david.n.adosci.civ@mail.mil	FORT DETRICK	Active
PAYMENT OFFICE	ISSUE	DFAS-HQ0490	8899 E. 56TH STREET		http://www.dfas.mil/dfas/contractors/vendors.htm	INDIANAPOLIS	Active
GRANTS OFFICER REP (GOR)	TECH					FORT DETRICK	Inactive
GRANT OFFICER REP (GOR)	TECH	CDMRP PROGRAM OFFICE			karen.m.wylie.civ@mail.mil	FORT DETRICK	Active

Message(s)

Error(s)
This Contact Type is already assigned to an active Contact. Please Inactivate the existing Contact before using this Contact Type.

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- (CMS-4243)(CMS-4235)(CMS-4265)(CMS-4386) CM has been updated to process CRADAs.
 - Similar to a BOA, when the CRADA is Awarded on an Opportunity, a unique identifier will be assigned. It will be displayed in the Contract Vehicle/BOA field.

The screenshot shows the 'Manage Opportunities' form with the following details:

- Opportunity ID:** P30033
- Record Source:** eRouting
- Record Status:** Active
- Contract Vehicle/BOA:** 1365
- Contract Vehicle Code:** P30033
- Contract Vehicle Type:** CRADA

The lookup window shows a list of contract vehicle codes and types. A red box highlights the 'Contract Vehicle Type' column, and a red arrow points to the 'CRADA' entry.

To distinguish CRADAs from BOAs, the Contract Vehicle Type has been added to the lookup. Once a unique identifier is assigned to the CRADA #, a different Contract Vehicle Code/BOA cannot be selected from the list.

- When creating a new contract, the CRADA # will auto-populate in the Name field of the contract.

The screenshot shows the 'Manage Contracts' form with the following details:

- Contract ID:** CNTR-00000000012636
- Main Opportunity ID:** P30033
- Sponsor Contract No:** 2112121212
- Contract Vehicle/BOA:** 1365
- Name:** Release 1B Testing - CRADA
- Document ID:** 221286
- Record Status:** Active
- Contract Status:** A
- Contract Type:** CRNF
- Cost Reimbursement No Fee:** Yes
- Project Type:** RES
- Research:** Yes

The 'Name' field and the 'Contract Vehicle/BOA' field are highlighted with red boxes.

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- On Award Actions, you can now select CRADA as an Award Project Type. Award Value/Funding is not required in order to complete an initiation.

The screenshot displays the 'Award Actions - Identification' form. The 'Award Project Type' dropdown menu is highlighted with a red box and set to 'CRADA'. The 'Award Value' and 'Award Funding' sections are also highlighted with red boxes, showing that these fields are not required for completion. The form includes fields for Contract Mod ID, Project Mod ID, Revision Number, Description, Action Type, Start Date, End Date, Effective Date, Award Date, Federal Award Date, Opportunity ID, Fund Types, Funding Sponsor, Value, Fee %, Cost, Fee, Cost Share Amount, Initiation, Initiation End Date, Send to Workday OR Send Notification, Modification, Modification Date, Document Load, Document Load Date, and Create New Project Modifications. The 'Administrative Notes (Feed to CIS)' section contains the text 'Initiation of CRADA #1365'.

Award Dates	
Start Date	07/01/2025
End Date	07/01/2026
Effective Date *	06/06/2025

Award Value	
Value	0.00
Fee %	0.00%
Cost	0.00
Fee	0.00
Cost Share Amount	

Award Funding	
Value	0.00
Fee %	0.00%
Cost	0.00
Fee	0.00
Cost Share Amount	

Workday Response Message
Data Created in the Interface table for GTRI Processing.

Administrative Notes (Feed to CIS) *
Initiation of CRADA #1365

Notes