

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.

- (ER-4196) On an RI Modification in eRouting, the **Prime Sponsor** is defaulted from the Prime Award.
If there is no Prime Sponsor for the award, then No will be selected for Is there a Prime Sponsor for this proposal? and the question will be disabled.
There is an issue with this scenario, and it will be fixed early the week of 6/16/2025.

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Sponsor

Sponsor: UNIVERSITY OF FLORIDA
[Description of Sponsor Type](#)
The Sponsor is not located or is new to GA Tech.

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: 4/26/2025
Time Due: 8:00 AM

Mailing Address:
Sponsor Contract Number:
Optional

Is this a Foreign Sponsor?
Yes No

Prime Sponsor

Is there a Prime Sponsor for this proposal?
Yes No

Prime Sponsor: AIR FORCE/AR FORCE RESH LAB/ROME, NY
[Description of Prime Sponsor Type](#)
The Prime Sponsor is not located or is new to GA Tech.

Due Date to Prime Sponsor: 4/24/2025
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 [POPI]

Proposal Routing Preparation | Proposal Routing Approvals | In Sponsored Progress | In Final Disposition

P29830
new | Zure, David G (POPI) | Created on: 2025-03-31 16:05:20 888065 | [View Proposal Info](#)

Proposal Home Department: GTRI-ELSYS-1EN
Proposed Award Type: SSA (Specialized Service Agreement)
Total Amount Proposed: \$323,232.00
Contracting Officer: D'Urso, Christopher

Estimated Start Date: 3/12/2025
Estimated End Date: 11/30/2027
Due Date to Sponsor: 4/4/2025
Time Due: 3:00 PM

Proposal

Proposed Award Type: SSA (Specialized Service Agreement)
[Description of Proposed Award Type](#)

Proposal Award/Classification: New Award

Proposal Accounts

B&P Number: F55BP70.00.P2.9930

B&P Hours: 23
Optional

Notes:
Optional

- (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 (1354)

BOA Description:
Optional

- (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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BOA Information

Estimate Length Type: ☒ Months ☐ Days

BOA Information

BOA Number

Type BOA number or key word

☐ The BOA Number is not located

BOA Information

This section is for entering information about the Contract Vehicle that will govern this Task Order. You cannot proceed without an active BOA number (e.g., 1349) or at least a pending BOA Proposal ID. If no Contract Vehicle has been established, return to the Proposed Award Type field above and route a Contract Vehicle before trying to route the Task Order.

BOA Number

You can type ARMY, UARC or other search word to find the BOA. If you are certain you have an active BOA, but you cannot locate it by BOA number or key word, then either select the checkbox below for "The BOA is not located" to receive an additional prompt, or contact OSP now.

BOA Information

BOA Number

Type BOA number or key word from title

☒ The BOA Number is not located

Pending BOA:

Enter PE for pending BOA; e.g., P23456

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

Cassidy, Catherine C.

Conrath, Angela

Craft, Matthew

Crosby, Wendell Thompson

Culter, Jack P.

Dalbano, Christopher

Daniels, Vanessa D.

Davis, Esperanza Naveja C.

Duncan, Melissa Jane

Dyson, Brian Adam

Eason, Elizabeth Hager

Ellis, James R.

Endrey, Lane

Fabian, Anthony T.

Gallagher, Loretta

Gilley, Dennis

Green, Kathryn

GTRI Fed Flow Thru Nonprofit Other Federal

Hess, Nathaniel Alexander

Johnson, David

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

Technical Contact Email:

Administrative Contact Email:

Optional

OSP Instructions:

Optional 0/2000

Save **Save and Continue**

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.

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

Frequency -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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The screenshot shows a contract details form with the following information:

- General Tab:**
 - Sponsor Account: 3393
 - NATIONAL SCIENCE FOUNDATION (NSF)/GENERAL
 - Contract Status: **Terminated** (highlighted with a red box)
 - Contract Type: GRNF
 - Cost Reimburs: Cost Reimburs
 - Costpoint Project Type (GTRI Only): GRNF
 - Project Type: RES
 - Research
- Basic Info:**
 - Prime Sponsor (Federal) Account: [Empty]
 - Prime Sponsor Contract No: [Empty]
 - Award Type: GRANT
 - CFDA No: [Empty]
 - Full Title: Engineering Enzyme Vesicles with Stimuli Responsive Partitioning Behavior for High Reactivity and Simultaneous Product Separation
 - Contract Vehicle/BOA: [Empty]
 - Task Order No: [Empty]
 - Primary Work Location: [Empty]
 - Primary Home Dept: 190
 - Chemical and Biomolecular(190)
- Contact Info:**
 - Project Manager: 3538598
 - Champion, Julie A
 - Subcontract Admin: [Empty]
 - Federal Agency: [Empty]
 - Acquisition Agency: [Empty]
 - Cognizant DCAA: [Empty]
- Message(s):**
 - Error(s):** Cannot Terminate until all deliverables are completed. (highlighted with a red box)

- (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.

The screenshot shows the 'Manage Contracts > Contract Deliverables' subtask form with the following information:

- Deliverable:**
 - Number: [Empty]
 - Reoccurring Template: ☒ (checked)
 - Award Action Revision #: [Empty]
 - Type: [Empty]
 - Type Name: [Empty]
 - Description: [Empty]
 - Original Due Date?: [Empty]
 - Full Description: [Empty]
- Due Date:**
 - Sponsor Due Dt: [Empty]
- Date:**
 - Delivered: [Empty]
 - Satisfied: [Empty]
 - ☐ Satisfied
- Reoccurring Deliverable:**
 - Frequency: -None-
 - Begin/End Dates are for the 1st deliverable only** (highlighted with a red box)
 - Begin Date: [Empty]
 - End Date: [Empty]

- (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.

The screenshot shows the 'Manage Contracts > Manage Contract Contact' subtask table with the following data:

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.wyllie.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. (highlighted with a red box)

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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. The 'Contract Vehicle/BOA' field is highlighted with a red box and contains the value '1365'. A red dashed arrow points from this field to a 'Lookup' window. The 'Lookup' window displays a table of Contract Vehicle Codes and Types. A red box highlights the 'Contract Vehicle Type' column, and a red arrow points to the text 'Contract Vehicle Type has been added to the lookup.' The table lists various codes and types, including CRADA and BOA.

Contract Vehicle Code	Contract Vehicle Description	Contract Vehicle Type
1353	P29980	CRADA
1354	P29981	BOA
1355	P29942	CRADA
1356	P26735	BOA
1357	P29495	CRADA
1358	P23763	CRADA
1359	P24695	CRADA
1360	P29991	CRADA
1361	P25758	CRADA
1362	P30014	CRADA
1363	P30019	BOA
1364	P30029	BOA

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. The 'Name' field is highlighted with a red box and contains the value '1365'. The 'Contract Vehicle/BOA' field is also highlighted with a red box and contains the value '1365'. The 'Award Type' field is set to 'CRADA'. The 'Full Title' field contains 'Release 1B Testing - CRADA'. The 'Primary Home Dept' field contains 'IMS(138)'.

Contract ID	Main Opportunity ID	Sponsor Contract No	Contract Status	Contract Type	Costpoint Project Type (GTRI Only)	Project Type
CNTR-00000000012636	P30033	2112121212	Active	CRNF	CPFF	RES

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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 is highlighted with a red box and set to 'CRADA'. Other fields include 'Contract Mod ID' (000), 'Revision Number' (0), 'Description' (CRADA Initiation), 'Action Type' (Initiation), 'Start Date' (07/01/2025), 'End Date' (07/01/2026), 'Effective Date' (06/06/2025), 'Award Date' (06/06/2025), 'Federal Award Date', 'Opportunity ID' (P30033), 'Funding Sponsor' (3M ADVANCED MATERIALS DIVISION/ST. PAUL, MN), 'Initiation End Date' (06/06/2025), 'Initiation' checkbox, 'Send to Workday OR Send Notification' checkbox, 'Modification' checkbox, 'Document Load' checkbox, 'Document Load Date', and 'Create New Project Modifications' checkbox. The 'Award Value' and 'Award Funding' sections are also visible, each containing fields for Value, Fee %, Cost, Fee, and Cost Share Amount, all set to 0.00. The 'Workday Response Message' section contains the text 'Data Created in the Interface table for GTRI Processing.' The 'Administrative Notes (Feed to CIS)' section contains the text 'Initiation of CRADA #1365'. The 'Notes' section is empty.

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	