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Purpose & Use
The Proposal Routing form is used to obtain the necessary approvals before submitting proposals for grants and contract funding.

Information Needed
- PI contact information
- Co-PIs’ contact information (if applicable)
- Sponsor name and program information
- Proposal title, amount, and dates
- Project information and requirements
- Budget, budget justification, and proposal narrative
- Information about any subawards/contracts
- Cost share information
- F&A rate information
- Information on any conflicts of interest
- Email addresses for approving supervisors

Form Routing

Initiator / PI → Co-PIs (if applicable) → Dept. Head/Chair/Directors → Deans/VPs

Research Administrator → Final Approval → Initiator / PI

Click this link to review a more detailed workflow chart.

Statuses

Incomplete
The form opens in Incomplete status and can be edited by the initiator. The initiator can save progress on an Incomplete proposal routing form by clicking the Save button in the bottom-right-hand corner of the screen.

Awaiting Co-PI #
If no Co-PIs are listed, the form will not enter this status.

If all required fields are completed, Co-PIs are listed, and the Submit for Co-PI Signature button is clicked, the form will enter Awaiting Co-PI 1 status. This indicates that the form still requires the signature of the first Co-PI listed.
The Co-PI will be notified via email to review and sign the conflict of interest form embedded in the Proposal Routing form.

If multiple Co-PIs are listed, once the first Co-PI signs their conflict of interest statement, the Proposal Routing form will proceed from **Awaiting Co-PI 1** status to **Awaiting Co-PI 2** status.

Up to four Co-PIs may be listed on one Proposal Routing form.

If more than four Co-PIs will be included on the project, the fifth and further Co-PIs should fill out a **Standalone Conflict of Interest** or **Standalone Conflict of Interest (PHS)** form. Attach the PDF to the Proposal Routing form for each additional Co-PI.

**NOTE:** Co-PIs must be full-time employees of UNO. See [IMD 85.003 on PI Eligibility](#) for more information.

### Awaiting PI

A form may enter **Awaiting PI** status if:

1. An initiator fills out all required fields and clicks the **Submit for PI Signature** button.
2. All listed Co-PIs have signed the form.

Once either of these conditions is met, the form will enter **Awaiting PI** status. The PI will be notified via email to review and sign the conflict of interest form embedded in the Proposal Routing form.

**NOTE:** PIs must be full-time employees of UNO. See [IMD 85.003 on PI Eligibility](#) for more information.

### Awaiting Chair

Once the PI and all listed Co-PIs have signed their conflict of interest statements and the final signer clicks the **Submit for Chair Approval** button, the Proposal Routing form will enter **Awaiting Chair** status.

The department head/chair/director listed for the PI will be notified via email that a new Proposal Routing form requires their review and approval.

The form will remain in this status until the department head/chair/director enters their signature and clicks the **Submit for Dean Approval** button.

### Awaiting Dean

Once the PI’s department head/chair/director has submitted the form with their signature and clicked the **Submit for Dean Approval** button, the form will enter **Awaiting Dean** status.

The dean/VP listed for the PI will be notified via email that a new Proposal Routing form requires their review and approval.

The form will remain in this status until the dean/VP submits the form with their signature and clicks either the **Submit for Chair Approval** button (if there are Co-PIs in other departments) or clicks the **Submit to Research** button.

### Awaiting Chair #

If no Co-PIs are listed, the form will not enter this status.

If all the Co-PIs listed are in the same department as the PI, the form will not enter this status.

If Co-PIs are listed on the proposal and any Co-PIs are not in the same department as the PI, then multiple sets of supervisory approvals will be necessary.

After obtaining the approval of the PI’s dean/VP, the form will enter **Awaiting Chair 1** status. This indicates that the form is seeking approval from the department head/chair/director associated with the first Co-PI who is listed in a different department than the PI.
The department head/chair/director listed for the Co-PI will be notified via email that a new Proposal Routing form requires their review and approval.

The form will remain in this status until the department head/chair/director submits the form with their signature and clicks the Submit for Dean Approval button.

If multiple Co-PIs are listed in different departments than the PI, then, once the first Co-PI’s supervisors have signed the form to indicate their approval, the Proposal Routing form will proceed from Awaiting Dean 1 to Awaiting Chair 2 status.

Up to four Co-PIs’ supervisors, if different than the PI’s, may be asked to sign the Proposal Routing form.

**Awaiting Dean #**

If no Co-PIs are listed, the form will not enter this status.

If all listed Co-PIs are in the same department as the PI, the form will not enter this status.

If Co-PIs are listed on the proposal, and if any Co-PIs are not in the same department as the PI, then multiple sets of supervisory approvals will be necessary.

After obtaining the approval of the Co-PI’s department head/chair/director, the form will enter Awaiting Dean 1 status. This indicates that the form is seeking approval from the dean/VP associated with the first Co-PI who is listed in a different department than the PI.

The dean/VP listed for the Co-PI will be notified via email that a new Proposal Routing form requires their review and approval.

The form will remain in this status until the dean/VP submits the form with their signature and clicks the Submit for Chair Approval button (if there are other Co-PIs in other departments) or clicks the Submit to Research button.

If multiple Co-PIs are listed in different departments than the PI, then once the first Co-PI’s supervisors have signed the form to indicate their approval, the Proposal Routing form will proceed from Awaiting Chair 2 to Awaiting Dean 2 status.

Up to four Co-PIs’ supervisors, if different than the PI’s, may be asked to sign the Proposal Routing form.

**Submitted**

If the form has collected signatures from the PI, all listed Co-PIs, and all listed supervising approvers and the Submit to Research button is clicked, the form will enter Submitted status.

The initiator (and the PI, if different) will receive an email confirming submission of the form to the Office of Research. The form will forward to the appropriate Pre-Award Research Administrator for processing or to any other Office of Research reviewers necessary.

**Awaiting Approval**

If the form has collected the signature of a Research Administrator in the Office of Research and the Request Final Approval button is clicked, the form will enter Awaiting Approval status.

The form will forward to the Executive Director for Research & Economic Development or their designee to review.

**Rejected**

If a form is rejected by any party, the form will enter Rejected status. The initiator (and the PI, if different) will receive notification of the rejected form via email.
**Completed**

If a form is approved by the Executive Director for Research & Economic Development or their designee, the form will enter **Completed** status. The initiator (and the PI, if different) will receive notification of the approved form via email.

**Recipients**

- **Incomplete**
  - An email address can be entered after clicking the **Save** button; the saved form will be emailed to this address

- **Awaiting Co-PI #**
  - Initiator
  - PI (if different)
  - Co-PI(s)

- **Awaiting PI**
  - Initiator
  - PI (if different)

- **Awaiting Chair**
  - Department head/chair/director listed for PI

- **Awaiting Dean**
  - Dean/VP listed for PI

- **Awaiting Chair #**
  - Department head/chair/director listed for Co-PI(s), if different than PI’s

- **Awaiting Dean #**
  - Dean/VP listed for Co-PI(s), if different than PI’s

- **Submitted**
  - Initiator
  - PI (if different)
  - Research Administrator
  - Director of External Collaboration (if necessary)
  - Assistant Vice President for Research & Economic Development (if necessary)
  - Contracts Specialist (if necessary)

- **Awaiting Approval**
  - Executive Director for Research & Economic Development or their designee

- **Rejected**
  - Initiator
  - PI (if different)

- **Completed**
  - Initiator
  - PI (if different)

**Sharing Forms with Persons Outside Defined Routing**

If the form needs to be sent to any recipients other than those listed above, contact Julie Landry at jelandr1@uno.edu. Do not share any custom Cognito Forms links with other users.
Initiator Instructions by Section

Principal Investigator

1. **Select the PI to AUTO-POPULATE contact information:** If we have a faculty/staff profile on file for a PI, you may search for and select the PI’s name from the dropdown list. Their name, email address, phone number, college, department, and Workday ID will all auto-populate.

2. **First Name:** Enter the first name of the UNO PI (if not auto-populated).

3. **Last Name:** Enter the last name of the UNO PI (if not auto-populated).

4. **UNO Email Address:** Enter the UNO email address for the UNO PI (if not auto-populated).

5. **Phone Number:** Enter a phone number for the UNO PI (if not auto-populated).

6. **College:** Select the PI’s college from the dropdown menu (if not auto-populated); the college selected will determine which options are available in the Department dropdown.

7. **Department:** Select the PI’s department from the dropdown menu (if not auto-populated); the options will be filtered based on the College selected.

8. **Workday Employee ID:** Enter the Workday employee ID for the principal investigator (if not auto-populated).

9. **If you are NOT the PI, provide your email address:** Enter the UNO email address of the initiator, if different than the principal investigator.

10. **Are there any Co-PIs:** Select Yes to add Co-PIs to the proposal routing form.
Co-Principal Investigators

This section only appears if the user selects Yes to the question Are there any Co-PIs?

1. Select the Co-PI to AUTO-POPULATE contact information: If we have a faculty/staff profile on file for a Co-PI, you may search for and select the Co-PI’s name from the dropdown list. Their name, email address, phone number, college, and department will all auto-populate.

2. First Name: Enter the first name of the co-principal investigator (if not auto-populated).

3. Last Name: Enter the last name of the co-principal investigator (if not auto-populated).

4. UNO Email Address: Enter the UNO email address for the co-principal investigator (if not auto-populated).

5. Phone Number: Enter a phone number for the co-principal investigator (if not auto-populated).

6. College: Select the Co-PI’s college from the dropdown menu (if not auto-populated); the college selected will determine which options are available in the Department dropdown.

7. Department: Select the Co-PI’s department from the dropdown menu (if not auto-populated); the options will be filtered based on the College selected.

8. Add Co-PI: Click the button to add another Co-PI; repeat steps 1-7 as necessary. Up to four Co-PIs may be added.
Sponsor

NOTE: Proposals may have both a “Sponsor” and a “Prime Sponsor.” If funds are coming to UNO from the Louisiana Board of Regents, the sponsor is the Board of Regents. If the Board of Regents’ funds originated from the National Science Foundation, then NSF is the prime sponsor. The funds originated at NSF (prime sponsor) and were issued to Board of Regents (sponsor), who will give UNO an award.

1. **Select UNO’s sponsor:**
   Search for and select the UNO sponsor from the dropdown menu.
   
   NOTE: If the funding agency is not listed, select “(New/Unlisted Sponsor)” from the top of the menu. Then, enter the name of the sponsor organization in the text field that appears.

2. **Will UNO’s Sponsor be funded by a Prime Sponsor:**
   Select “Yes,” “No,” or “Unsure.” A Prime Sponsor is a top-level organization where funding originates. If UNO’s sponsor will be issuing funds received from any other entity, select “Yes.” If yes:
   - **Select the Prime Sponsor:** Search for and select the Prime Sponsor from the dropdown menu.
   
   NOTE: If the funding agency is not listed, select “(New/Unlisted Sponsor)” from the top of the menu. Then, enter the name of the prime sponsor in the text field that appears.

3. **Date Due to Sponsor:** Enter or select the date when the proposal will be due to the sponsor.

4. **Time Due to Sponsor:** Enter or select the time when the proposal will be due to the sponsor on the due date. If unknown, select 4:30 PM.

5. **Time Zone:** Select the time zone applicable to the sponsor’s due date/time.

6. If no due date is applicable for this proposal, you may check the box to remove the due date/time requirements.

7. Select the proposal submission method from the dropdown menu; options include:
   - Office of Research will submit electronically
   - PI will submit electronically
   - Office of Research will send through U.S. Mail
   - Department will retrieve physical packet

8. Provide a website link or attachment that provides the sponsor’s program guidelines or request-for-proposals (RFP); if no program description is available, select “N/A” and explain.
Proposal

1. **Title:** Enter the full proposal title as it will appear on your application.

2. **Type:** Select the proposal type from the dropdown menu; options include:
   - New
   - Internal
   - Non-competing Renewal
   - Pre-proposal / Notice of Intent
   - Supplemental
   - Resubmission
   - Transfer In

3. **Start Date:** Enter or select the date when work on the funded project will begin.

4. **End Date:** Enter or select the date when work on the funded project will conclude.

5. **Sponsor Amount:** Enter the amount of funding being requested from the sponsor for the project.

6. **Is this a proposal for a limited submission funding opportunity:** Select “Yes,” “No,” or “Unsure.” A limited submission funding opportunity means that the sponsor will only accept a limited number of proposals from a university/region.

Project Information & Requirements

1. Answer each question by clicking the radio button for **Yes**, **No**, or **Unsure** as appropriate.
   NOTE: The form is responsive; your answers may prompt more on-screen instructions.

2. Click the **Definitions & Explanations** link for more information about each question.
Submission Documents

1. To attach files, click the corresponding **Upload** button and navigate to where the file is saved on your computer. You may also drag and drop files from your computer.

   **NOTES:**
   - The maximum file size allowed for a single uploaded file is 250 MB—about the size of a Blu-Ray movie!
   - All uploaded files will be included on automated routing emails sent to reviewers—unless the total size of all uploaded files exceeds 17 MB. The uploaded files will always be accessible when viewing the form, regardless of size.

2. **Budget:** Attach the project budget created using one of our **UNO budget templates**—download a fresh copy of the template for every project!

3. **Budget Justification:** Attach the budget justification for the project. We recommend using our **templates**.

4. **Proposal Narrative/Statement of Work:** Attach the proposal narrative or statement of work for the project. You may upload a working draft.

5. **Does the Office of Research need to sign any documents for the sponsor or submitting agency:** If the Office of Research needs to sign a cover letter, letter of commitment, subrecipient form, or otherwise, select “Yes.” A new section will appear allowing you to list the documents that need to be signed and to upload them as necessary.

6. **Additional Documents:** If you need to upload any additional documents, click the “Add Attachment” button. Enter a description of the attachment into the text box. Then, upload the file from where it is saved on your computer. You may add more attachments by clicking the “Add Attachment” button again.

F&A Distribution

**F&A Distribution**

Complete this section to request how the Facility & Administrative (F&A) costs should be split among departments, centers, institutes, etc. Refer to **IMD 05.002** regarding how F&A is allocated.

The distribution percentages must total to 100%. If the F&A will not be split, select the single department/center/institute and enter 100%.

<table>
<thead>
<tr>
<th>Department/Center/Institute</th>
<th>Distribution %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Total: 100.00%</td>
<td></td>
</tr>
</tbody>
</table>

**F&A Distribution**
To Charge F&A Costs to One Department/Center/Institute

1. **Department/Center/Institute:** Will auto-populate with the PI's department as selected in the Principal Investigator section; you may update this row as necessary.

2. **Distribution %:** The first row will auto-populate with 100; do not update this row.

To Split F&A Costs Among Departments/Centers/Institutes

1. **Department/Center/Institute:** The first row will auto-populate with the PI’s department as selected in the Principal Investigator section above; you may update this row as necessary.

2. **Distribution %:** The first row will auto-populate with 100; you may update this row as necessary.

   NOTE: The distribution percentages from all rows must total to 100%.

3. **Add Department:** Click this button to add another row.

Budget Notes & Exceptions

1. Answer each question by clicking the radio button for **Yes** or **No** as appropriate.

2. Click the Definitions & Explanations link for more information about each question.

Subaward/Contractual Services

1. Report whether your project will involve a subaward or contractual services agreement.

2. If you select “Yes,” a new section will appear.

3. Fill out the **Subrecipient vs. Vendor/Contractual Services** interactive tool to determine the classification of the outside entity and generate a PDF.

4. **Subrecipient or Vendor Name:** Enter the name of the Subrecipient or Vendor.

5. **Classification Form:** Attach a PDF of the results from the Subrecipient vs. Vendor/Contractual Services interactive tool.
Cost Share

1. Report whether or not the proposal involves cost share. Cost share might include course releases, GA tuition, etc.

2. If you select “Yes,” a new section will appear.

3. Report whether cost share is required by the sponsor; if it is, reference documentation from the sponsor as evidence.

4. **Cost Share Lines:** Add a cost share line for each instance of cost share included on the grant.
   - Explain what is being paid for as cost share.
   - Select the source of the cost share—where the funds are coming from.
   - Provide the Cost Center, Function, Fund, and other relevant worktags. Worktags may be found in Workday or provided by your chair/business manager.
   - Worktags for Office of Research cost share will auto-populate. Do not alter these worktags.
   - Add as many lines as necessary.

Off-Campus F&A Rate

1. Report whether more than 50% of the work will be conducted off campus; exclude subawards in this calculation. *The radio button for “No” is auto-populated.*

2. If you select “Yes,” a new section will appear.

3. Provide the location for the off-campus work.

4. Provide a justification for the off-campus work.
Adjusted F&A Rate

1. Report whether or not the proposal requires adjustments to the required F&A rate. The radio button for “No” is auto-populated.

2. If you select “Yes,” a new section will appear.

3. Provide the adjusted F&A rate.

4. Justify the adjustment to the F&A rate. Alternatively, link to or attach documentation from the sponsor.

Intellectual Property

1. Answer each question by clicking the radio button for Yes, No, or Unsure as appropriate.

2. Click the Definitions & Explanations link for more information about each question.

NOTE: We are only asking these questions for the purposes of internal review and tracking; your answers will not affect IP ownership.

Lab Safety

1. Answer each question by clicking the radio button for Yes or No as appropriate.

2. Click the Definitions & Explanations link for more information about each question.
Mandatory Certifications

1. Agree to each of the mandatory certifications:
   a. **Debarment/Suspension:** Check “PI and Co-PIs agree.”
   b. **Scientific Commitment:** Check “PI and Co-PIs agree.”
   c. **Award Commitment:** Check “PI and Co-PIs agree.”
   d. **Legal Applicant:** Check “PI and Co-PIs agree.”
   e. **Plagiarism:** Check “PI and Co-PIs agree.”

   NOTE: All investigators will sign below to affirm their individual agreements.

2. Click the **Definitions & Explanations** link for more information about each certification.

Form Routing

**Form Routing**

Enter the email addresses for the department head/chair/director and the dean/VP who supervise the PI. If they have already filled out a faculty/staff profile, you may select them from the list.

Contact your supervisors to learn what policies dictate approvals for your department/college.

If your department head/chair/director or dean/VP delegates signatures to a business manager or to a departmental email inbox, enter that email address in place of the approver's.

The form will route to whatever email address is entered.

Never forward a Cognito Forms email or link to another individual. Enter the correct UNO email address below to include it in the routing.

1. **Department Head/Chair/Director Name:** If we have a faculty/staff profile on file for the PI’s department head/chair/director, you may search for and select their name from the dropdown list. Their email address will auto-populate.

2. **Department Head/Chair/Director Email:** Enter the UNO email address for the PI’s department head/chair/director (if not auto-populated).
3. **Dean/VP Name:** If we have a faculty/staff profile on file for the PI’s dean/vice president, you may search for and select their name from the dropdown list. Their email address will auto-populate.

4. **Dean/VP Email:** Enter the UNO email address for the PI’s dean/vice president (if not auto-populated).

   NOTE: If Co-PIs listed on the proposal are from different departments than the PI, the form will ask for the email addresses for the Co-PI(s)’ supervisors as well.

**Submit for PI Signature**

If you are initiating the form for the PI, click the **Submit for PI Signature** button. This button appears if an email address is entered in the “If you are NOT the PI, provide your email address” box under the Principal Investigator section.

The form will proceed through the **Form Routing**.

If you are the PI and initiating your own form, proceed to the next section.

**Comments**

1. **Add Comment:** If relevant, click the **Add Comment** button to add a comment to the form.

2. Type your comment in the box that appears. Your username and the date may auto-populate above the comment. If your name does not auto-populate, enter it.

3. If necessary, click the **Add Comment** button again to add more comments.

**Conflicts of Interest & Research Team Signatures**

**Notes on Signing the Proposal Routing Form**

- Once the PI signs the **Conflict of Interest (COI)** form, the **Proposal Routing** form will lock.
- The PI will not be able to sign the form until all listed Co-PIs have signed the form.

**Accessing the Signature Area**

1. When you receive an email requesting your signature as a PI or Co-PI on a Proposal Routing form, click the link in the email to open the form.

2. Review all the information reported in the form.

3. Scroll to the bottom of the form to the **Conflict of Interest** section.
Conflict of Interest: Report of Financial Interest in Research

NOTE: Depending on your project information and requirements, the language in your conflicts of interest form may differ from what is shown below.

Screening Questions

1. Answer each question by clicking the radio button for Yes or No as appropriate.
2. If you answer Yes to any of these questions, provide an explanation.

Notes on Signing the Conflict of Interest Form

- By signing the Conflict of Interest form, you are agreeing to all information listed in the Proposal Routing form.
- Once signed, the Conflict of Interest form will lock.
- Once the PI signs the Conflict of Interest form, all submitted information in the Proposal Routing form will lock.

How to Sign

1. Read the certification language.
2. Signature: Enter your full name. Your username and the date will auto-populate.
3. Your signature will be recorded in the Research Team Signatures section. If you reported a conflict of interest, this will be noted.
4. Click the blue button in the bottom-left corner of the form to submit the form to the next signer.
5. The form will automatically proceed through the Form Routing.
Supervisory Review

Approve

1. To approve the Proposal Routing form, scroll down to the Approval Signatures section, reviewing the form as you do. Read the certification.

2. Scroll down to where your department and position are listed.

3. **Signature:** Enter your name in the appropriate place. Your username and the date will auto-populate.

4. Click the blue button in the bottom-left corner of the form to submit the form to the next signer.

5. The form will automatically proceed through the Form Routing.

Reject

1. To reject the Proposal Routing form, scroll to the bottom of the form and click the blue Reject button.

2. You may need to check the box beneath Save or Reject Form in order to ignore required fields.

3. The PI (and the initiator, if different) will receive an email.

Conflict of Interest Review

Process

1. Scroll down to the section where an investigator reported a conflict of interest. Review the information and contact the PI as necessary.

2. You may:
   a. Remove the conflict of interest, if it was reported in error, then approve the proposal.
   b. Address the conflict of interest, then approve the proposal.
   c. Reject the proposal.

Remove Conflict

1. If a conflict of interest was reported in error, scroll down to where the investigator reported the conflict.

2. Change their answer to the question from “Yes” to “No.”

3. Scroll to the bottom of the form and click the blue Submit to Research button.
Address Conflict

1. Leave a comment in the **Comments** section explaining how we have addressed the conflict of interest.
2. Scroll down to the **Proposal Processing (Office of Research Only)** section.
3. Change **Have conflicts of interest been appropriately addressed?** from “No” to “Yes.”
4. Type your name in the **Signature** field.
5. Scroll to the bottom of the form and click the blue **Submit to Research** button.

### Proposal Processing (Office of Research Only)

```
Have conflicts of interest been appropriately addressed?  
☐ Yes  ☐ No  ☐ N/A

Signature *

```  

Reject

4. To reject the Proposal Routing form, scroll to the bottom of the form and click the blue **Reject** button.
5. You may need to check the box beneath **Save or Reject Form** in order to ignore required fields.
6. The PI (and the initiator, if different) will receive an email.

Save Work

You may save your work at any time without signing the form or sending it forward. For example, if you need more time or have a question, you can save your work without completing all required fields.

1. Scroll to the bottom of the form and click the blue **Save Work** button.
2. You may need to check the box beneath **Save or Reject Form** in order to ignore required fields.

Sub/Vendor Review

Process

1. Scroll down to the **Subaward/Contractual Services** section. Review the information and contact the PI as necessary.
2. You may:
   a. Update information, then approve the proposal.
   b. Approve the proposal.
   c. Reject the proposal.
Update Information

1. Scroll to the Subaward/Contractual Services section.
2. You may update the name of a subrecipient/vendor.
3. You may remove a subrecipient/vendor.
4. You may upload a new classification form for a subrecipient/vendor.

Approve

1. Once you have confirmed that all entered information about subrecipients/vendors is correct, scroll down to the Proposal Processing (Office of Research Only) section.
2. Change Has information about subrecipients/vendors been confirmed? from “No” to “Yes.”
3. Type your name in the Signature field.
4. Scroll to the bottom of the form and click the blue Submit to Research button.

Reject

1. To reject the Proposal Routing form, scroll to the bottom of the form and click the blue Reject button.
2. You may need to check the box beneath Save or Reject Form in order to ignore required fields.
3. The PI (and the initiator, if different) will receive an email.

Save Work

You may save your work at any time without signing the form or sending it forward. For example, if you need more time or have a question, you can save your work without completing all required fields.

1. Scroll to the bottom of the form and click the blue Save Work button.
2. You may need to check the box beneath Save or Reject Form in order to ignore required fields.
Proposal Review
Process & Approve

1. To process and approve the Proposal Routing form, scroll down to the Proposal Processing (Office of Research Only) section.

2. **Purpose Code**: Select the purpose code from the drop-down menu.

3. Report whether there are any federal funds involved in the proposal.
   - If federal funds are involved in the proposal, either provide a PDF of the assistance listing/CFDA number description or indicate that the number is currently unknown.

4. Confirm that the pre-award team reviewed the proposal for plagiarism by checking the box.

5. If the PI provided a website link for the sponsor guidelines, convert the website to a PDF and upload it in place of the website.

6. Scroll down to the Approval Signatures section under Office of Research.

7. **Research Administrator**: Enter your full name in the signature box. Your username and the date will auto-populate.

8. **Request Final Approval**: Once you have signed your name, click the blue Request Final Approval button in the bottom-left corner of the form.

9. The form will automatically proceed through the Form Routing.

Reject

1. To reject the Proposal Routing form, scroll to the bottom of the form and click the blue Reject button.

2. You may need to check the box beneath Save or Reject Form in order to ignore required fields.

3. The PI (and the initiator, if different) will receive an email.
Save Work

You may save your work at any time without signing the form or sending it forward. For example, if you need more time or have a question, you can save your work without completing all required fields.

1. Scroll to the bottom of the form and click the blue Save Work button.
2. You may need to check the box beneath Save or Reject Form in order to ignore required fields.

Final Review

Approve

1. To approve the Proposal Routing form, scroll down to the Approval Signatures section, reviewing the form as you do.
2. Scroll down to the Office of Research section at the bottom of the form.
3. **Final Approval:** Enter your full name in the signature box. Your username and the date will auto-populate.
4. Click the blue Approve button in the bottom-left corner of the form.
5. The form will automatically proceed through the Form Routing.

Reject

1. To reject the Proposal Routing form, scroll to the bottom of the form and click the blue Reject button.
2. You may need to check the box beneath Save or Reject Form in order to ignore required fields.
3. The PI (and the initiator, if different) will receive an email.

Contacts

Technical Issues

If you encounter a technical issue with the Cognito Form, contact Julie Landry at jelandr1@uno.edu.

Research Policy/Scenario Questions

If you have a question about your submission or its results, contact the appropriate member of your service team as indicated on the Office of Research website.