CONTRACT ROUTING IN PD – GUIDANCE DOCUMENT FOR BUSINESS OFFICES

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BUILDING THE PD RECORD

Start by following instructions in the PD Quick Guide section: Initiating a proposal (Non-S2S), complete steps 1 through 10

SETUP QUESTIONS TAB

1. Change the submission mechanism/screen template to Contract Routing – Contract Template and click OK in the pop up box.
2. Change the Associated Department as appropriate
3. Select the Program Type from the drop down
4. Designate if the majority of research will be conducted on or off campus
5. Click Save
6. Click Completed check box
BUDGET TAB

1. Enter budget items as needed, including salary for personnel
2. Enter the appropriate F&A charge
3. Click Complete Budget button
4. Click Done to close budget window

PERSONNEL TAB

1. Add appropriate personnel.
2. Click Completed check box

INTERNAL DOCUMENTS

1. Add and complete Regulatory Form. Be sure to choose “Contract” under the Instrument Type
2. Upload Statement of Work
3. Add the contract as an Internal Document and label as “Draft Contract”
4. Upload the contact information of the sponsor (name, email address and phone number)
5. If there are other documents related to the contract, upload into the record and label appropriately
6. Click Completed check box

FINALIZE TAB

1. Click Thumbs-Up next to Submit Final Review
2. The route will include, by default, the PI and the TA who supports the department associated with the record
3. Insert any additional people such as department administrators
4. Click Submit to begin route
5. The TA will route the record to the appropriate contract manager, who will review the record and inform the departments if more information is needed

AMENDMENTS TO CONTRACTS

1. Any amendments to the contract will NOT come through PD (no child records), but rather an amendment and any supporting documents must be sent to your GCAT mailbox via email.
2. The TA will open an Activity Log to your Contract Manager to review, negotiate and process the amendment.