EPaws institutional record requirements:

1. **Minimum requirements:**
   a. Minimum fields: Research Theme, Title, FOA (or “none”), Lead Unit, Principal Investigator Name, Role
   b. All questions answered
   c. Attachments for institutional records required to approve college commitments include the budget, budget justification, and abstract, or alternatively, an export of the full proposal, as well as documentation supporting financial commitments (e.g. reduced F&A, tuition waivers, etc.)

2. **For Subawards (incoming and outgoing):**
   a. On incoming Subawards, list Prime PI name and admin contacts in the comments box
   b. On outgoing Subawards, list the names of the Subawardee(s) in the comments box

3. **Required fields must be completed before the ePaws institutional record can be submitted for routing.**

EPaws Best Practice Process:

1. **Twice daily, Grant Officers (GOs) check ePaws for any institutional records associated with their portfolio:**
   a. On tab “In Progress” they select “Assign to me;” As a result of “Assigning to GO”, the GO will be alerted via email when an institutional record, with all requirements listed above, has been routed to the GO for review
   b. On tab “Pending Reviews” they select “Edit” and assign the record to themselves; they receive a confirming email that the record has been assigned to them

2. **Within 2 business days of an institutional record being routed for review, the GO will review the institutional record, and provide a general review comments memo to the PI and department (which will be attached to the ePaws record):**
   a. Institutional records may be returned for substantive changes
   b. When changes have been incorporated, or if there are no changes, GO will route the institutional record for college and PI approval

3. **The department will alert the GO by email when the proposal application is ready for review (e.g. in Fastlane, ASSIST, or other method); GO will provide comments/corrections by return email to PI and college admin; GO will insert comment in ePaws when feedback is provided**

4. **Proposals applications will be submitted in accordance with the funding agency deadline, which if necessary, may be prior to obtaining all department/college approvals.**

5. **At the end of the workflow, when a final stamped version of the application from the sponsor system is available, the GO will upload it to the institutional record as an ‘other attachment’ with the description that tells what it is (e.g. the final submitted version), and will complete the record in the system.**

6. **Weekly, the GOs or GMAs will follow up on institutional records submitted the prior week and which have not been finalized in ePaws; escalate to Director after 1 week of follow up.**