McCormick Research Administration Job Aid: Completing the Proposal Routing Form/OSR-1

- **You can ignore these options unless you need to print the form to pdf or see the Form History.**
- **If you choose one of the other answers here, you don’t need to complete the rest of the form and it won’t appear.**
- **This information will be in the program announcement/solicitation.**
- **Once you have completed the form by checking this box, it’s locked to editing until you un-Complete it.**

Optional. If using, enter “New,” “Supplement,” “Renewal,” etc.

You can always edit the title on this form. For S2S proposals, you can also edit it from the SF 424 tab.

Enter the F&A Rate manually. If multiple rates, enter the one for the majority of the budget.

“Sponsor Contact Information” and “Key Words” should be left blank.

The PI, sponsor names, Proposal #, and Opportunity # (if S2S) populate automatically.

The department populates automatically from the Setup Questions tab.

If you choose one of the other answers here, you don’t need to complete the rest of the form and it won’t appear.

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If you answer No, a table with the direct and indirect costs will appear and populate automatically.

Enter a description of the proposal type. If non-S2S and there is an Opportunity # (e.g. NSF PD 12-345), include it here.
Manually type Project Role and select Appointment Type. If multiple appointments, use primary Appt Type.

You must type a number into each of the effort fields, even if it’s “0.”

Use these checkboxes if any outyear effort is different from the first year’s.

There’s only one VA appointment on the Evanston campus, but it’s more common in Feinberg. Check with your FSM collaborators’ RA.

Even when you check No to the appointment, these will appear. Check No again and then ignore the upload prompt.

This is very rare. You would know if this happened because it means that the investigator got in a lot of trouble.

Shared F&A Agreements mostly exist in Feinberg. This field is not to be used when subprojects or F&A sharing is requested on a case-by-case basis.

Usually only needed for new faculty members.

See eligibility guidelines and process to request PI status for ineligible investigators [here](#).

Whole numbers only.

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**RAS/RAS-E vs. non-RAS:**

Ability to use the RAS (Research Assistant Scholarship) rate depends on whether the sponsor will pay this rate, which is reduced from the [full NU tuition rate](#).

If the sponsor will pay for tuition at this rate, TGS approval is not needed and you can select Yes to the RAS/RAS-E question and fill in the number of students.

If the sponsor will not provide tuition support at all, or the amount is capped at less than the RAS rate, select Yes to the Other Tuition Support question. You should then submit a request to Pat Mann for tuition coverage, and upload her confirmation to Internal Documents.

Click [here](#) for the complete FY12-13 RAS policies and procedures.
The PI should provide this information. Feinberg faculty often use resources of NMH and/or NMFF.

This is very unusual unless you have a PI who does extended field work (uncommon in McCormick).

Rare and usually unallowable as project cost unless it’s specifically a construction award. If checked Yes, Dean Lueptow must approve.

Ignore the wording of this question. If cluster(s) will be purchased, check Yes and always confirm space with Dean Lueptow’s office. Otherwise, check No.

The PI should provide this information.

Check Yes if either the sponsor or specific program requires NU to collect COI disclosures.

If the lab already does this type of work, they should have a plan on file in ISIS. No need to have a separate plan for each proposal/award.

The PI should provide this information.

The PI should provide this information. OSR may contact INVO based on responses.

Check No unless OSR tells you to use this. Unclear whether this has ever happened.
This should be just a high-level overview. Details about cost-sharing sources and requirements should be included in Comments section (below) and Internal Documents.

If the only cost-sharing is voluntary cost-shared academic salary (e.g. 1% mandatory PI commitment), check No.

PI should provide this information. May not be clear from the budget. If Yes, this opens the section below.

PI should provide this information. If no submission required (e.g. proposal already approved), clarify in notes.

Choose best option(s). If electronic, list system. If email, list contact name/email address. If mailing, list physical address.

If electronic, list system. If email, list contact name/email address. If mailing, list physical address.

This is for your contact information. Ignore Chart String lines.

Provide detailed notes in this section, including important information for reviewers, OSR, and your own reference. See “InfoEd Proposal Routing Notes” Job Aid for details.