



Learning with Purpose

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**OFFICE OF RESEARCH ADMINISTRATION**

**Application for Proposal Routing and Approval (APRA)**  
**Co-PI Instructions**

As the first step in the proposal process, the Principal Investigator must complete and submit the Proposal Routing Form (PRF) through APRA. This application will not only be used to notify the Office of Research Administration (ORA) of the proposal submission, but also route to the appropriate signatories for their required approvals prior to ORA’s proposal review and submission. The application replaces the former Proposal Intake Form and Proposal Routing Form generated in PeopleSoft, combining them into one, easy-to-use package.

This document provides step-by-step instructions for Co-PIs to confirm participation in an upcoming proposal.

**1. Once the PI submits the PRF and all signatories have approved, the Co-PI(s) will receive an email**

The email will come from Microsoft Flow (email domain will be @microsoft.com) and the subject will always be “Co-PI Designated: Proposal – \*PI Name\* – \*Sponsor\*”

**Please note:** At the top of the email it states “Requested by Ourique, Sonia” as she is the creator of APRA. Sonia should not be contacted with questions regarding APRA or the proposal. Such questions are to be directed to the ORA contact assisting with the proposal.

**2. Review email attachments**

The Co-PI designation email will always contain attachments for the Co-PI to review. These include the submitted PRF, budget, project summary, and any other documents the PI attached in APRA. If the PI was required to revise and resubmit the PRF by one of the signatories, multiple PRFs will be attached and contain version numbers (i.e. V1, V2, V3, and so on). Be sure to review the highest version number, as that is the PRF approved by the signatories.



**IMPORTANT:** Should you have any concerns regarding the information attached, please contact the PI of the project, not ORA.

**3. Review assurances in body of email**

As a Co-PI it is critical to thoroughly review all information as clicking the Accept button (Step 4), you affirm:

- Assurance that the information submitted within the application is true, complete and accurate to the best of the CPIs knowledge.
- Certification that they are not currently suspended, debarred, or proposed for debarment or suspension for doing business with the Federal Government.
- Compliance of the proposal with applicable, institution, sponsor, federal, and state rules, regulations and guidelines
- Acceptance of responsibility to conduct and judiciously manage the project in accordance with the terms and conditions of the sponsoring agency and the institution in the event that this proposal is funded and accepted by the University.
- UMASS resources necessary to complete the project are available or provisions have been arranged with the appropriate personnel to make such resources available in the event that this proposal is funded
- Assurance that they are in compliance with the Institutions Patent Policy and Conflict of Interest Policy.



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4. Click Accept at the bottom of the email (pending acceptance)

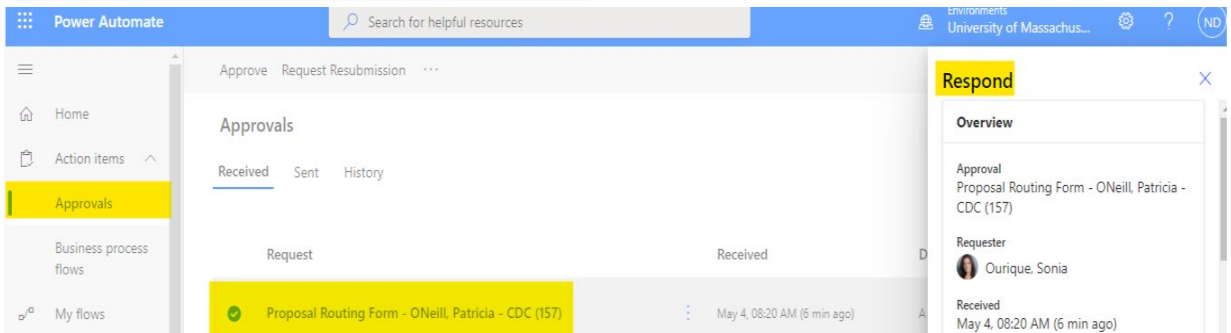


*Please note: If the Co-PI does not click Accept at the bottom of the email within the day, a reminder email will be sent daily to ensure timely processing.*

The reminder email will no longer contain the Accept button. At that point the Co-PI can do one of two things:

- Click the Accept button through the original email; or
- Click the link provided in the reminder email. This will bring up a Microsoft Flow-Approvals Dashboard where all pending PRFs requiring response can be found. By clicking the desired PRF a Respond window will appear on the right side. Scroll down the Respond window to review all attachments, confirm assurances, and respond using the available options.

**Please respond via this link:** <https://flow.microsoft.com/manage/environments/Default-4c25b8a6-17f7-46f9-83f0-54734ab81fb1/approvals/received/70695a10-97dc-4f5c-9fa2-8885fadf92ca?loginTenant=4c25b8a6-17f7-46f9-83f0-54734ab81fb1>



**IMPORTANT:** PRF requests will also appear in the Microsoft Teams Approval App. Although this shows a list of all PRFs and allows you to accept or decline the request, please use one of the two review/approval methods listed above. Reason being, the attachments required for review are not accessible through this option. Again, it is critical to review all attachments for accuracy before accepting the Co-PI responsibilities and confirming approval of the information provided by the PI.

**Once the Proposal Routing Form has been fully signed it will route to ORA for review and approval. Since an FCOI is required for all personnel responsible for the design, conduct, and/or reporting of a project, Co-PIs should monitor their email for a DocuSign FCOI signature request and respond to it promptly as proposals cannot be submitted without a fully executed FCOI on file.**