

Electronic Proposal Signature Routing Sheet (ePSRS)

Policies

[Policy 27001 – Establishing an Award](#)

Forms

[Change in Personnel Form](#)

Overview

The Electronic Proposal Signature Routing Sheet (ePSRS) is an internal document that summarizes a sponsored project proposal, including period of performance, effort commitments of key personnel, budget, cost share, shared credit, related certifications, and other pertinent information. The principal investigator (PI) and other key personnel, deans, department chairs, and/or other required approvers must review and approve the ePSRS prior to proposal submission.

Approvals are obtained electronically within the PeopleSoft Grants Module (PeopleSoft). The DRA enters the proposal data to create the ePSRS, reviews for accuracy, and then submits for approvals. Approvers are determined by way of the Resources and Shared Credit panels in PeopleSoft and the Electronic Approvals Security Tree maintained by the Office of Sponsored Programs Administration (OSPA) and each division's fiscal officer.

PeopleSoft sends an email notification to the designated approvers with a direct link for access to the project's ePSRS. Each approver must log into PeopleSoft to review the ePSRS and indicate approval or disapproval by checking the appropriate box.

Once all approvals are obtained, the DRA sends the ePSRS with the proposal documents to the OSPA Senior Grants and Contracts Administrator (SGCA) for review and submission of the proposal to the sponsor.

Risk

While the ePSRS is an internal document and not a sponsor requirement, it is important to obtain appropriate approvals of commitments of effort, cost share, and other resources prior to proposal submission. The ePSRS is the document of record should questions arise at award or during the project's period of performance.

Procedure

Frequently Asked Questions and corresponding answers are provided in [Appendix 1](#) below.

Principal Investigator (PI) – The PI prepares the proposal in accordance with sponsor guidelines and provides the proposal and supporting information to the DRA. Once the ePSRS is routed through PeopleSoft, the PI reviews and indicates approval or disapproval.

Departmental Research Administrator (DRA) – The DRA enters the proposal data in PeopleSoft and routes the ePSRS for approval. The DRA monitors the PeopleSoft Electronic Approvals (EA) page or Global Queue to ensure all approvals are obtained timely.

OSPA Senior Grants and Contracts Administrator (SGCA) – The OSPA SGCA ensures all approvals are obtained and works with the Pre-Award Manager/Authorized Signer to submit the proposal. At the request of the DRA or approver, the SGCA resets the ePSRS, allowing the DRA to modify the PeopleSoft proposal, regenerate the EA page, and route for new approvals.

OSPA Compliance Team – The OSPA Compliance Team assists with training in the ePSRS module and serves as liaison between the campus and the Controller’s Office concerning technical issues.

OSPA Administrative Team – The Pre-Award Manager/Authorized Signer makes changes to the Electronic Approvals Security Tree as requested by the division fiscal officer/department administrator via the [ePSRS Security Changes form](#) on the OSPA website.

Responsibilities

Below is an outline of responsibilities as they relate to this process.

Principal Investigator (PI):

- Works with the DRA to complete internal documents and proposal application materials.
- Reviews the ePSRS in PeopleSoft using a direct link received by email.
- Indicates approval or disapproval.

Departmental Research Administrator (DRA):

- Works with the PI to complete internal documents and proposal application materials.
- Creates the ePSRS, reviews for accuracy, and submits for approvals.
- Monitors the PeopleSoft EA page or Global Queue to ensure timely approval.
- Routes the approved ePSRS to the OSPA SGCA along with the proposal documents.

ePSRS Approver:

- Reviews the ePSRS in PeopleSoft using a direct link received by email.
- Indicates approval or disapproval.

Fiscal Officer:

- Determines default and alternate approvers for the department/division for the Electronic Approvals Security Tree.
- Requests changes to the Electronic Approvals Security Tree as needed by completing the ePSRS Security Changes form on the OSPA website.

Office of Sponsored Programs Administration:

- Ensures all necessary approvals are obtained prior to proposal submission.
- Assists PI/Department with technical issues.
- Maintains the Electronic Approvals Security Tree.

Need Help?

If you have questions or comments about this procedure or the required form, contact OSPA at muresearchospa@missouri.edu or 573-882-7560.

Related Topics

[Cost Share](#)

Creation Date

11/01/2013

Last Revision Date

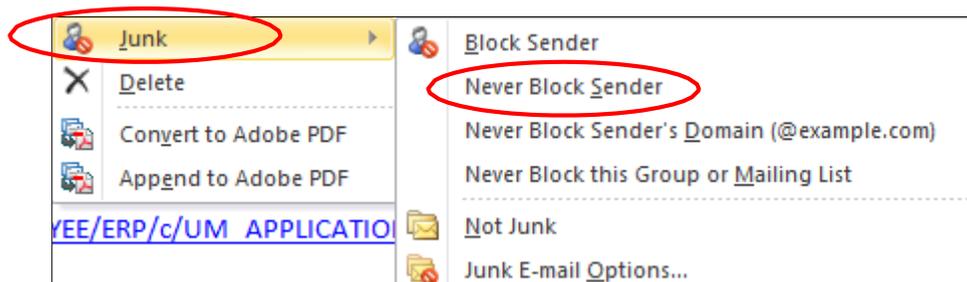
05/12/2022

APPENDIX 1. FREQUENTLY ASKED QUESTIONS

1. [I submitted an Electronic Approval \(EA\), but PeopleSoft did not generate an email notification or a blank email was generated. What do I do?](#)
2. [My Principal Investigator \(PI\) clicked on the link in the notification email and got a message indicating that \(s\)he does not have access. What do I need to do to get access for my PI?](#)
3. [One of my approvers clicked on the link in the notification email and got a message indicating that s\(he\) does not have access. What do I need to do to get access for this individual?](#)
4. [We have a new Department Chair. How do we update our departmental security settings so the new Chair pulls in as a required approver?](#)
5. [Can I request updates to another department or division's security settings?](#)
6. [I entered a key person in the Resources panel. Why aren't the dean and department chair approval lines appearing on the EA page for that individual?](#)
7. [I didn't get a PSRS \(.pdf file\) by email when I clicked the Print button at the bottom of the EA page. Why not?](#)
8. [Nothing comes up when I try to access the EA page by entering a proposal number. Why not?](#)
9. [I received an error message that says " Page Data is Inconsistent with Database " when I tried to save the EA page. What is causing this error and how can I resolve the issue?](#)
10. [How can I remove an unapproved proposal from My EA Queue or the Global Queue?](#)
11. [Which roles on the Resources Panel pull into the EA page as approvers?](#)

1. I submitted an Electronic Approval (EA), but PeopleSoft did not generate an email notification or a blank email was generated. What do I do?

If the user who entered the proposal did not receive an email or if an approver did not receive an email, first check the junk mail folder. If the email is in junk mail, right click on the email to adjust mail filter options.



If the email is not in the junk email folder or if a blank email was generated, there is a problem with one of the approver lines. Make sure that there are names on all of the lines. Contact your OSPA

Senior Grants and Contracts Administrator (SGCA) if there is a line with no name.

If there are names on each approval line and a blank email is received, the problem has to do with a known issue. Contact your OSPA SGCA. OSPA will work with the Controller's Office to create an email that can be routed to the approvers.

2. My Principal Investigator (PI) clicked on the link in the notification email and got a message indicating that (s)he does not have access. What do I need to do to get access for my PI?

Individuals holding a faculty title are automatically "PI eligible." If the PI does not have a faculty title, he or she may not yet be "PI eligible."

To request PI eligibility access, complete the Request PI Eligibility Access form on OSPA's website: https://missouri.qualtrics.com/jfe/form/SV_5yE1G3kWuxYIUuy. An email is sent to OSPA when you "Click to Submit" at the bottom of the page. OSPA will set up the appropriate access and notify the requestor by email when the process is complete. *Note:* Any individual who is "PI eligible" is automatically granted PeopleSoft Grants Module access.

If the individual is "PI eligible" and is unable to sign in, check his or her Human Resources (HR) Record. If the Employee Status is "inactive" (e.g., from a prior leave of absence), the HR Record must be updated before the PI can sign in to approve.

If the PI is "PI eligible" and there are no issues with the HR Record, try a different browser (e.g., Internet Explorer, Google Chrome, Mozilla Firefox) than your default. If the problem persists, contact your departmental IT administrator. If the issue is not IT-related and thus still not resolved, contact your OSPA SGCA.

3. One of my approvers clicked on the link in the notification email and got a message indicating that (s)he does not have access. What do I need to do to get access for this individual?

Complete the Request Grants Module Access form on OSPA's website:

https://missouri.qualtrics.com/jfe/form/SV_4NqtpbLXGqNPRWK. An email is sent to OSPA when you "Click to Submit" at the bottom of the page. OSPA will set up the appropriate access and notify the requestor by email when the process is complete.

4. We have a new Department Chair. How do we update our departmental security settings so the new Chair pulls in as a required approver?

Complete the ePSRS Electronic Approvals Security Additions and Changes form on OSPA's website: https://missouri.qualtrics.com/jfe/form/SV_6hcb4DNlxGolzAW. An email is sent to OSPA when you "Click to Submit" at the bottom of the page. OSPA will make the change and notify the requestor by email when the process is complete.

5. Can I request updates to another department or division's security settings?

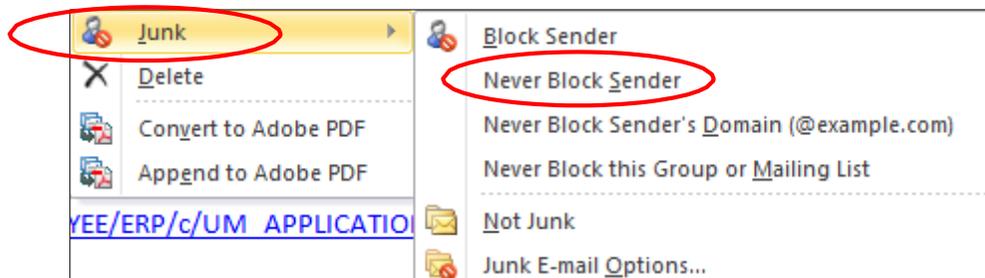
If changes are needed to another department or division's security, please work with the departmental research administrator (DRA) in that department or division. Requests to modify security settings must be initiated by the affected department or division.

6. I entered a key person in the Resources panel. Why aren't the Dean and Department Chair approval lines appearing on the EA page for that individual?

An individual entered in the Resources panel will show up as an approver. In order to pull in the Department Chair and Dean for that individual, the appropriate DeptID must be entered in UM Shared Credit panel even if that individual is not to receive any shared credit (enter 0% if this is the case).

7. I didn't get a PSRS (.pdf file) by email when I clicked the Print button at the bottom of the EA page. Why not?

First check the junk mail folder. If the email is in junk mail, right click on the email to adjust mail filter options.



If the email is not in the junk email folder or a blank email was generated, contact your OSPA SGCA.

8. Nothing comes up when I try to access the EA page by entering a proposal number. Why not?

Wait a few minutes and try again. Generating the EA page is a PeopleSoft process that may take a bit of time. If you are still unable to access the page after a few minutes, go to Maintain Proposal and click the "Electronic Approvals" button again. If after another few minutes you are still unable to access the EA page, contact your OSPA SGCA.

9. I received an error message that says "Page Data is Inconsistent with Database" when I tried to save the EA page. What is causing this error and how can I resolve the issue?

The error occurs when the page is saved, subsequent changes are made, and then the user attempts to resave. If changes are needed after the EA page has been saved once, navigate away from the EA page. Return to it to make changes and then save again.

10. How can I remove an unapproved proposal from My EA Queue or the Global Queue?

Email [your OSPASGCA](#) with the proposal number(s). The status will be updated to “discontinued” and the proposals will drop off of the queue.

11. Which roles on the Resources Panel pull into the EA page as approvers?

The following roles will appear on the EA page if selected in Maintain Proposal→Resources: Co-I, Co-PI, Key Personnel, Principal Investigator, and Signature EA. An individual with the role Notification of EA will receive a notification email but will not be required to approve.