

Basic Instructions

1) Starting a new transmittal form:

- **Login to the Online Transmittal website located at the address above using your UGA MyID and password**
- **Click the “Create a New Transmittal” button located at both the top and bottom of the Transmittal Form home page.**
- **Complete the form fields as necessary. Fields with a red border are required to continue.**
 - **In the Principal Investigator box, click the “Select PI” button to search for and add the PI’s name.**
 - **Once the PI is selected be sure to enter the appropriate “Budgetary Unit” number in the red “Budgetary Unit” field. This number will determine to which department the account is assigned.**
 - **If you are completing a “non-competing continuation” transmittal form you DO NOT need to add the names for the department head and dean.**
 - **For all other transmittal types, add names to the Department Head/Director and Dean fields. If you are submitting from a center or institute only the Department Head/Director field needs to be filled.**
 - **If someone in the department has signatory authority for the Department Head or Director, put their name in this slot so that the transmittal will be routed to them for approval.**
 - **If your college has a Research Dean sign the form, enter their name instead of the College Dean. If Dean signatory authority has been provided to another person, select the name of the person who will actually be signing the form.**
 - **Add Co-PI and Key Persons as necessary and add Department Head/Director and Dean information as was done for the PI.**
- **Click the “Save Transmittal” button.**
- **The transmittal will now be in the “Saved Transmittals” queue. Click the “Route” button to the right of the appropriate form to route to the PI.**
- **The application separates the roles of “form creator” from that of PI. If you are also the PI on the project, clicking “Route” will send the form to your “Transmittals Routed to You” queue, where you will need to click the “Approve” button.**
- **A PI certification screen will display. Complete the provided fields as necessary. The form will then be routed to the people selected as “Department Head” as well as the Co-PI’s if present.**
- **The form will then be approved by all personnel in turn. You can track the status of the approval from the Transmittal form home page.**

The Queues

1) Individuals working in Sponsored Programs or termed “Departmental Contacts” by OSP will see the queue pictures by #1. All OSP personnel will be able to see transmittals for departments. Departmental Contacts will be able to view and search for transmittals where a named researcher is associated with their department. Others not associated with either of these two groups will not see this queue.

2) The “Transmittals Routed to You” queue (#2) will display the forms that require your approval. If you are named as PI, Co-PI, Department Head, Dean, or Key Personnel, you will be required to approve the form before it is forwarded to OSP. This queue is fully searchable and provides two task options: “Approve” and “Reject”. The “approve” task moves the form on to the next reviewer while the “Reject” task will require you to enter a reason for the rejection and return the form to its original author.

3) The “Transmittals You Routed” queue (#3) will display the forms for which you are the original author and which you have routed for approval. The queue is fully searchable and provides the status of the form, including information regarding whose approval is required next. The “Approval Progress Chart” provides an overview and status of the entire approval process. There are four possible tasks within this queue. The “Recall” task removes the form from workflow, removes any applied approvals, and makes the form completely editable by the original author and the named PI. The “Recall Edit” task pauses the form workflow and enables the “Edit Approval Chain” task. The “Edit Approval Chain” task allows the author or PI to edit the approval routing specified on the form while maintaining all other form fields as read-only. Co-PIs, Department Heads, Deans, and Key Personnel can be changed as needed using this task. If the person being removed has already approved the form, this approval is simply deleted, requiring that

his/her replacement approve the form. All other approvals remain intact and the form will not need to be “re-signed” due to this type of change. The “Resume Routing” task allows a form with an edited approval chain to be restarted within workflow using the new approval pathway.

OSP Transmittal Form

OnLine Transmittal Form (logged in as: Gary Rachel) (Logout)

Transmittals Received by Sponsored Programs:

ID#	PI	Bud. Unit	Title	Status	Showing Last 5
Last Name Only					SEARCH
Not Yet Accepted					SHOW ALL RESET
No transmittals have reached OSP or no transmittals match search criteria.					

Transmittals Routed to You:

ID#	Type	PI	Bud. Unit	Title	Status	Showing Last 5
Last Name Only					Awaiting Your Approval	SEARCH SHOW ALL RESET
OTF46	PI Approval, Dean Approval	Rachel, Gary	005	Test 7/10/10	Awaiting Your Approval	APPROVE... REJECT...
OTF37	PI Approval, Dept. Head Approval, Dean Approval	Rachel, Gary	005	Test 3/16/10 GCR #1	Awaiting Your Approval	APPROVE... REJECT...

Transmittals you Routed:

ID#	PI	Title	Status	Showing Last 5
Last Name Only			Awaiting Approval	SEARCH SHOW ALL RESET
OTF46	Rachel, Gary	Test 7/10/10	Awaiting approval from: Rachel, Gary [Approval Progress Chart]	RECALL RECALL EDIT
OTF39	Rachel, Gary	Test 4/8/10	Awaiting approval from: Rachel, Gary [Approval Progress Chart]	RECALL RESUME ROUTING EDIT APPROVAL CHAIN
OTF37	Rachel, Gary	Test 3/16/10 GCR #1	Awaiting approval from: Rachel, Gary [Approval Progress Chart]	RECALL RECALL EDIT
OTF36	Rachel, Gary	Test 3/11/10 GCR #2	Awaiting approval from: Owens, Glenn [Approval Progress Chart]	RECALL RECALL EDIT

Saved Transmittals:

ID#	PI	Title	Date Created	Status	Showing Last 5	
Last Name Only					Not Routed	SEARCH SHOW ALL RESET
OTF42	Rachel, Gary	GCR Testing #1 6/23/10 [Transmittal Rejected]	06/23/2010	Not routed	ROUTE EDIT DELETE	

Transmittals on Which You Are the PI / Co-PI:

ID#	Title	Date Created	Status	Showing Last 5
Last Name Only				SEARCH SHOW ALL RESET
OTF46	Test 7/10/10	07/09/2010	Awaiting approval from: Rachel, Gary [Approval Progress Chart]	EDIT RECALL RECALL EDIT
OTF42	GCR Testing #1 6/23/10	06/23/2010	Transmittal Rejected	
OTF41	June 18 Test 1	06/18/2010	Not Yet Routed	
OTF39	Test 4/8/10	04/08/2010	Awaiting approval from: Rachel, Gary [Approval Progress Chart]	EDIT RECALL RESUME ROUTING EDIT APPROVAL CHAIN
OTF38	Test 4/8/10	04/08/2010	Received by Sponsored Programs	

CREATE A NEW TRANSMITTAL

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4) The “Saved Transmittals” queue will display the forms that you have authored but not yet routed for approval. This queue is fully searchable. The tasks available are “Route”, “Edit”, and “Delete”.

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5) The “Transmittals on which you are PI/Co-PI” queue ensures that PIs and Co-PIs can see all forms on which they are named as well as the status of the form. Individuals named as PI on a form will have the same functionality as described for queue #3.

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6) The “Create a New Transmittal” button opens a blank form for data entry.

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The Form

Most of the form fields are identical to the previous paper version of the transmittal form. For questions related to these fields, please contact your departmental administrator or your OSP representative. A few fields have special functionality or are particularly important for the webform to work. We review these fields below:

1) At the top of the webform is a “Copy Data from an Existing Form” button. If selected, you will be prompted to select one of the previous forms for which you are the author. The application will copy all form fields from this previous form into the current form.

2) Within the “Principal Investigator” box are placeholders for the names of three individuals (PI, Department Head, and Dean). Fill in these fields by clicking the appropriate Select button and navigating the subsequent search window. Once the correct PI is selected, please check the autofilled “Budgetary Unit” number to ensure this is correct. The Budgetary Unit numbers associated with the PI will be the department responsible for administering the account.

3) Co-Principal Investigators can be added by selecting the “Add a Co-PI” button. The functionality presented is identical to that of the Principal Investigator box.

4) The Academic Credit and F&A Return fields are summed from each associated field within the PI and Co-PI sections. The totals of all associated fields must equal 100% for the both Academic Credit and F&A Return.

5) Each of the Center and Institute Credit fields must both sum to 100% or 0%.

6) To include Other Key Personnel on the form, select the “Add a Key Person” button. The key person entered will become part of the approval chain in order to acquire the required certifications. The approval of the Key Persons’ Department Head and Dean are not needed.

7) To save the form and all of your entered data, select the “Save Transmittal” button at the bottom of the form. Once selected, the form data is saved and you are returned to the Queue Screen. You may then reopen and edit the form from the “Saved Transmittals” queue. Once a form has been populated and saved, it may be re-opened and exported to PDF format

OSP Transmittal Form

OnLine Transmittal Form
(logged in as: Gary Rachel)
(Logout)

<< Back to home page <<

Create New Transmittal COPY DATA FROM AN EXISTING FORM

Proposal Type

Proposal Type: ?

New Proposal
 Supplement to:
 Resubmission of:
 Non-Competing Continuation of:
 Competitive Renewal of:
 Pre-Proposal

Proposal or Account Number: ?

Project Information

Project Type: ?

Research (non-CAES)
 Instruction
 Public Service and Outreach
 Cooperative Extension
 CAES Experiment Station

Sponsor: ?

Due Date:

RFPIRFA#: ?

Title:

If this research originated from an OVPR/UGARF seed grant, provide seed grant number:

Budgetary and Project Period

Initial or Current Budget Period		Cumulative Project Period	
Start Date	End Date	Start Date	End Date
<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>

Budget Information

	Sponsoring Agencies Cost		UGA Cost Sharing	
	Direct Costs	F&A Costs	PI Dept./College Cost Sharing*	OVPR or VPAA Matching Funds*
Initial or Current Period	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Total Project Period	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>

* Attach a separate detailed budget for any cost sharing and/or matching funds proposed and an approval letter from each appropriate institutional official authorizing the cost-shared funds.

Compliances / Other Reviews (Approvals NOT required for proposal submission)

Does your project involve: ?

Animal Use (Research) - Please contact UGA Animal Care and Use, 542-5938, www.ovpr.uga.edu/acu/
 Animal Use (Client Owned - CVM Only) - 296-7819.
 Human Subjects - Contact the UGA Human Subjects Office, 542-3199, www.ovpr.uga.edu/huhs/
 Biohazards - Contact UGA Biosafety, 542-9347, www.ovpr.uga.edu/biosafety/bio/
 Research Computing - Contact the UGA Research Computing Center, 542-0188
 Material Transfers - Contact the Tech Commercialization Office, 542-5929, www.ovpr.uga.edu/cto/
 Export Controls - Project involves activities outside U.S. or foreign nationals.
 Program Income - Please check if you anticipate program income from the project.

Sponsor's Contact Information

Website:

Administrative Contact	Financial Contact
Name: <input style="width: 100%;" type="text"/>	Name: <input style="width: 100%;" type="text"/>
Email: <input style="width: 100%;" type="text"/>	Email: <input style="width: 100%;" type="text"/>
Phone: <input style="width: 100%;" type="text"/>	Phone: <input style="width: 100%;" type="text"/>
Address: <input style="width: 100%; height: 40px;" type="text"/>	Address: <input style="width: 100%; height: 40px;" type="text"/>

Principal Investigator

Principal Investigator	Phone No.	Email	Budgetary Unit ?	SELECT PI
PI's Department Head / Director	Phone No.	Email	Budgetary Unit	SELECT DEPT. HEAD / DIRECTOR
PI's Dean	Phone No.	Email	Budgetary Unit	SELECT DEAN

	Academic Credit ?	F&A Return Alloc. ?
ADD ROW	Budgetary Unit	Budgetary Unit
	%	%
<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>

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via a "Export to PDF" link located at the top of the form. This function will populate the traditional fillable PDF form with the webform data for subsequent printing or simply for ease of review.

If you have any questions, comments, or suggestions for improvements to the form or to this document, please contact Gary Rachel at gcrachel@uga.edu or 706-542-5905.

Co-Principal Investigators

[ADD A CO-PI](#)

The Academic Credit and F&A Return columns must each total to 100%

Academic Credit	F&A Return Alloc.
<input type="text" value="0"/>	<input type="text" value="0"/>

Center / Institute Credit

	Budgetary Unit	%	Budgetary Unit	%	Budgetary Unit	%	Budgetary Unit	%	Total
Center Credit (must equal 100%):	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
Institute Credit (must equal 100%):	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>

Other Key Personnel

[?](#)

[ADD A KEY PERSON](#)

Franklin College of Arts and Sciences -- Grant Proposal Commitments Checklist

1. Matching Funds:
 No commitments for matching funds are requested from Franklin College. Amount: \$
 Matching funds were requested from Franklin College and approved.
Comments:

2. Reduction in Teaching Load:
 No reduction in teaching load is requested in this proposal.
 A commitment of faculty time resulting in a reduction of teaching load was requested for this proposal and was approved.
Comments:

3. Research Time Buyout:
 No research time buyout is requested from Franklin College.
 A research time buyout was requested for this proposal and was approved.
Comments:

4. Additional Space:
 No commitment of additional institutional space is requested from Franklin College.
 A commitment of additional institutional space was requested for this proposal and was approved.
Comments:

College of Agricultural and Environmental Sciences (For CAES Only)

	AES (Must total 100%)	CES (Must total 100%)	Governor's Goals (Must total 100%)
Instruction Funding: \$ <input type="text"/>	Plants (%) <input type="text"/>	ANR (%) <input type="text"/>	Growing Georgia (%) <input type="text"/>
AES/Research Funding: \$ <input type="text"/>	Animals/Humans (%) <input type="text"/>	4-H/Youth (%) <input type="text"/>	Healthy Georgia (%) <input type="text"/>
CES/Extension Funding: \$ <input type="text"/>	Environment (%) <input type="text"/>	FACS (%) <input type="text"/>	Educated Georgia (%) <input type="text"/>
			Safe Georgia (%) <input type="text"/>

[SAVE TRANSMITTAL](#)

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