**Emory Proposal Express (EPEX) Procedure for Industry and Cooperative Group Funded Studies**

EPEX will be used for routing new and budget amendment Industry and Cooperative group funded studies. Below are EPEX routing instructions/steps as illustrated in the workflow diagram:

- Principal Investigator (PI) or designee enters study information in EPEX and attaches documents required by OSP. At minimum, the attachments for OSP should include:
  - Proposed Agreement (CTA)
  - Protocol
  - IRB approval (if available)
  - Conflict of Interest Disclosure Form

- By answering question #15 affirmatively, workflow will trigger for OCR and for Teresa Graves in OSP (reviewer only) once the proposal is Saved and Routed.

- PI certifies the information entered in EPEX which will electronically route the proposal to his/her department for approval.

- Department then reviews the study information in EPEX, sets up the F&A and selects the budget category of Direct with F&A (leave the $$ amount zero) and approves, which routes the proposal to OCR and OSP.

- OSP will begin the contract negotiation and OCR will begin budget negotiation with Sponsor.

- Upon completion of budget negotiation, OCR will update the Direct and Indirect Cost totals in EPEX, attach the budget in EPEX and electronically route to School of Medicine’s Business & Finance Office (B&F) or applicable School for approval.

- B&F/School reviews and approves the budget electronically which routes the proposal to OSP for final approval.

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1 Federal and foundation funded studies will follow the steps/workflow process for grant proposals. The exceptions are federal flow though studies that have not previously routed at the proposal stage-- these should route via the above process.

2 Budget Amendments requiring OCR review will follow the above process.
EPEX Flowchart for Corporate/Industry Funded Studies

CRC / PI enters CT information in EPEX
Attach documents required by OSP (CTA, protocol, COI, IRB, etc.) & OCR

PI Certifies

Dept Approves

OSP
Teresa Graves (review only)

OCR

School Approval

OSP
(Contract execution)