

## Emory Proposal Express (EPEX) Procedure for Industry and Cooperative Group Funded Studies<sup>1</sup>

EPEX will be used for routing new and budget amendment<sup>2</sup> 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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<sup>1</sup> Federal and foundation funded studies will follow the steps/workflow process for grant proposals. The exceptions are federal flow through studies that have not previously routed at the proposal stage-- these should route via the above process.

<sup>2</sup> Budget Amendments requiring OCR review will follow the above process.

## EPEX Flowchart for Corporate/Industry Funded Studies

