

Electronic Routing of the Proposal Routing Form

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Background and Overview

Sponsored Research Services (SRS) is responding to faculty requests for full electronic routing of the Proposal Routing Form (PRF) by implementing routing of the PRF via Adobe Sign.

Adobe Sign uses electronic signatures in place of handwritten signatures. Identity is verified using the signer's email and constitutes a legal electronic signature under the ESIGN Act. Working with your SRS pre-award representative (SRS Rep) to complete your PRF and using Adobe Sign for routing will save time, ease administrative burden, and accommodate remote working.

The Principal Investigator (PI) will download the current version of the PRF from the SRS website, fill it out, and then send it to their SRS Rep for review and/or corrections.

Please note that the PRF **must only be opened in Adobe Acrobat** in order to complete the form. Opening it in a browser or any other application may cause the file to be corrupted and it will not work as intended.

The PI and the SRS Rep will work together to address all issues that may require PRF approval, including cost share, including a postdoc in a proposal budget, whether or not to include a split of the college portion of the F&A return for cross college collaborations, and all other compliance issues.

Once the PRF is complete and the required supporting materials (i.e., budget, justification, draft SOW or proposal) are ready for review, the PRF can be routed to the senior personnel listed on the form for their approvals, and then to the appropriate administrative and academic personnel who must review and approve the PRF. The SRS Rep will manage the electronic routing to reviewers/approvers using Adobe Sign.

An added benefit of using Adobe Sign for electronic routing is that reviewers/approvers need not have Adobe on their computer to sign off.

Once the PRF has been approved by all senior personnel's academic/administrative units, SRS will confirm that all required documentation has been received. Then the PRF will be given a final review and approved by the Vice President for Research (VPR), who will also provide RIT's Authorized Organizational Representative (AOR) signature on any proposal documents under cover of the PRF. Such documents include institutional letters of commitment or intent, subrecipient commitments forms, or other institutional requirements.

Preparing the Proposal Routing Form

The following outlines the process for preparing the RIT Proposal Routing Form. You will need to have either Adobe Acrobat Reader DC or Adobe Acrobat Pro installed on your machine.

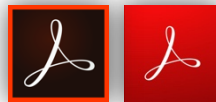
Adobe is available to Faculty and staff for home or office use through Software Center.

The PRF can be found using the following link:

<https://www.rit.edu/research/srs/formsagreements>

Please note that the PRF is modified periodically and that previous versions are obsolete.

1. Download and save the form on to your computer each time you route a proposal.
2. Be sure to open the form with Acrobat Reader DC or Acrobat Pro. Do not open with a viewer or browser; many of the features and tools will not work.



3. As you fill out the PRF, hovering over each field will provide instructions or definitions that will provide guidance on how each should be handled. If you still have questions, please contact your SRS Rep.

Submission Type New Award Supplement Pre-proposal Revised PRF*

Select Type of Proposal Submission

4. Please note the Special Distribution of College IDC found on page 4.

Special Distribution of College IDC	
College	Percent
Select College ▼	
Select College ▼	
Select College ▼	
Select College ▼	

- a. If your project involves Co-PI's from other colleges, you may need to include the percentage of distribution of F&A that each college will receive if the proposal is awarded. The split should be agreed upon before you begin routing the PRF. Be aware that some Deans or equivalents will want to understand the rationale for the distribution. SRS relies

on the investigators involved to propose a reasonable distribution across colleges based on intellectual and other contributions to the project, and SRS Reps can advise when necessary.

5. If the project is required to include cost share, please work with your SRS Rep to ensure that the appropriate signatory is designated to approve the commitment. Include the signatory's name, department and detail the costs as requested.
6. Once you have fully completed the PRF, email the form to your SRS Rep for review. Once she/he has reviewed the form, it can now be routed for signature.
7. Your SRS Rep will use Adobe Sign to begin the signature routing process. Please be sure to alert your SRS Rep if any of the signatories assigned have changed or been delegated temporarily due to travel, vacations or other reasons.
8. Please NOTE that:
 - a. PI signatures are required on Page 3 (Export Control Form) and Page 4.
 - b. Co-PIs, Senior Personnel, Department Head/Director and Dean or Equivalent signatures are required on Page 4.
 - c. If Cost Share is being requested, those with authority to approve the cost share must also sign the Cost Share Approval form.

Signing the Proposal Routing Form Using Adobe Sign

1. Once your SRS Rep has initiated approvals through Adobe Sign, each signatory will receive an email alerting them that their signature is being requested.
2. Note: You can sign via your smartphone. Click on the link from your Adobe Sign email. It will open the Adobe Sign Online Portal in a web browser where you can sign with a saved signature or sign directly on your smartphone screen in minutes. No Adobe app required. (steps below apply to smartphones as well)
3. Click on the link.



Adobe Sign

R-I-T PROPOSAL ROUTING FORM

Project Name: [Field] Location: [Field] Department: [Field]

Routing Table:

Stakeholder	Initials	Date
Stakeholder 1		
Stakeholder 2		
Stakeholder 3		
Stakeholder 4		
Stakeholder 5		
Stakeholder 6		
Stakeholder 7		
Stakeholder 8		
Stakeholder 9		
Stakeholder 10		

Please sign
PRF

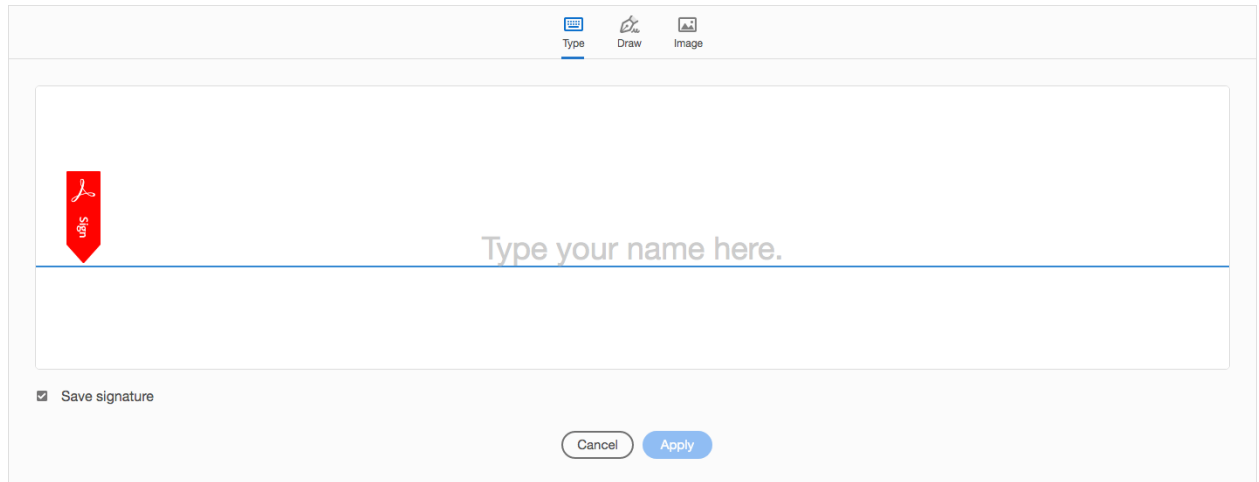


[Click here to review and sign PRF](#)

After you sign agreement will be sent to
Then, all parties will receive a final PDF copy by email.

If you need to delegate this document to an authorized party for signature, **please do not forward this email**. Instead, [click here](#) to delegate.

4. The link will open the document via the Adobe Sign Online portal. You will need to review all of the documents before completing the signing process.
5. If you have questions or concerns that may prevent you from approving, please contact the SRS Rep.
6. Scroll through the document to find your highlighted signature box. Click on “Click here to sign.”
7. You will now be able to either type in, draw with your mouse or use an image of your signature.



8. Now scroll to the bottom of the document and click on the blue “Click to Sign” icon.
9. The signing process will now continue on to the next signatory.