

## LINE-BY-LINE INSTRUCTIONS FOR COMPLETING UMBC INTERNAL ROUTING FORM FOR PROPOSALS

For assistance in preparing proposals and forms, see the Principal Investigator's Manual on the OSP website at [www.umbc.edu/ospa/](http://www.umbc.edu/ospa/) or call (410) 455-3140.

A completed routing form is required for all proposals for external support of research, training or service projects. Incomplete forms will be returned without processing. Note: Proposal cover page must have signature block for the University's authorizing official.

Any sponsor **deadline dates** for proposals should be entered in the upper right hand corner.

1. **Proposal title** will be used on UMBC statistical reports.
2. For each **project investigator/principal director (PI/PD)** list social security number (SSN), name, department, extension and e-mail. All project directors and/or principal investigators must have an appointment with UMBC.
3. (a) **Sponsor** is the organization awarding the funds directly to UMBC. For joint proposals when the other organization is submitting the proposal to the funding agency sponsor, our sponsor is the other organization (University XYZ or Company Q), not the funding agency.  
(b) **ALWAYS** include the **sponsor's complete mailing address**.
4. Attach Request for Proposal and/or sponsor proposal guidelines. All certification forms required by the sponsor to be signed must be attached along with terms and conditions.
5. List person OSP should contact about budget and administrative questions.
6. If more than one department/unit is involved, name the **department** that will be **administering** this project. This will be the department used in the Financial Accounting System (FAS).
7. Although project may involve more than one PI/PD from more than one department/unit, the FAS account number established for any resulting award can reflect only one department. Entries will record a percentage of project "credit" for the unit of the Co-PI listed.
8. Check the **appropriate activity** proposed.

**Research** is directed toward 1) increasing knowledge in science, 2) designing, developing, or testing of specific items or processes, or 3) determining the potential of discoveries in technology, materials, processes, methods, devices or techniques.

**Training/Instruction** are projects that incorporate teaching as a main objective.

**Other (e.g., Service)** involves the performance of work other than instruction/training or research. Examples of such projects are health and community service projects.

**Award type** – self-explanatory.

9. **Type of application.** Routing Form is not required for noncompeting continuations. Revision/modification means any variation in scope or budget exceeding 25 % of the original proposal.
10. Enter **start date** and **end date**. This period should cover all budget periods.
11. Fill in all spaces. Funding information is for this proposal only.
12. Indicate **facilities and administration rate**, and its base; check appropriate box if other than the standard on-campus rate is used. Note: MTDC denotes Modified Total Direct Cost per UMBC's rate agreement with the Federal Government. See Rate Agreement on the OSP web site. If waiver is requested, separate approval form must be completed. See OSP web site for policy and form.

13. **Cost sharing.** Should only be included when mandatory. Stipulate value of UMBC contribution and third party contribution if any. Must be accounted for by PI and Department should award be received. Detailed supporting documentation must be included in budget justification, along with any separate commitment.
14. See Principal Investigator's Manual on the OSP website. The budget/justification may be brief, but should include information so that a reviewer would have no trouble understanding what was included in a particular category and why.
15. If **additional resources** are needed for this project, documentation of agreements with internal or external officials is required.
16. Indicate whether a part of this project is to be **subcontracted**. (The term **subcontractor**, as used here, refers to an entity that will perform a substantive technical portion of the project. This does not include consultants or contractual services.) The subcontractor's proposal, signed by its authorizing official, must be included as part of the proposal to the sponsor. The subcontractor's current A-133 audit report should be included with their proposal.
17. Fill in as appropriate.
18. Fill in as appropriate.
19. Equipment means property items having a unit cost of \$5,000 or more with useful life of more than one year.
20. See UMBC policies on Conflicts of Interest located in the UMBC Faculty Handbook.