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.

---

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)