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Clinical Trial Routing Form Quick Reference Card for PI/Project Team

Need Help?

ITS Service Center: Technical support (e.g., navigation)

Phone: (734) 764-4957

Hours: Monday—Friday 7 AM—6 PM

ORSP Project Representatives

<http://orsp.umich.edu/contacts/orsp/staff.html>

Phone: (734) 764-5500

The **Clinical Trial Routing Form (CTRF)** is a PAF with a limited set of questions. A completed CTRF is used to notify ORSP to begin proposal negotiations while the Project Team completes the full PAF.

You can enter a CTRF if:

- the project is a Clinical Trial Site Activity (Class Code 31200) **or**,
- the project is an investigator-initiated, non-federal clinical trial with a draft agreement

The CTRF can be created in one of two ways:

- from your Home Workspace using the **Create New Clinical Trial Routing Form** button, **or**
- if the CTRF is tied to an **active** Unfunded Agreement (UFA), it can be created using the **Create Clinical Trial Routing Form** activity in the UFA Workspace. The system copies relevant UFA information into the CTRF.

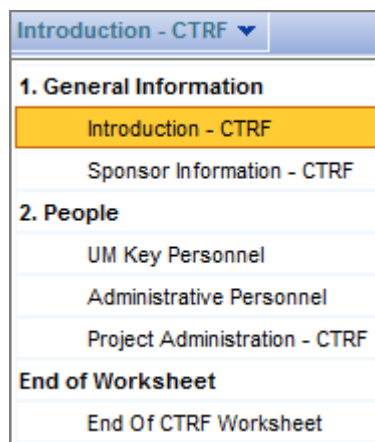
This procedure shows how to create a CTRF from your Home Workspace.

Home Workspace

1. From your Home Workspace, click **Create New Clinical Trial Routing Form**.



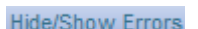
2. Complete the required fields (indicated with a red asterisk *****) in the **Introduction** section of the CTRF.
3. Click **Continue**.
4. Complete the remaining sections of the CTRF.




The screenshot shows a navigation menu for the CTRF. The menu is titled "Introduction - CTRF" and has a dropdown arrow. The menu items are: "1. General Information" (highlighted in yellow), "Introduction - CTRF", "Sponsor Information - CTRF", "2. People", "UM Key Personnel", "Administrative Personnel", "Project Administration - CTRF", "End of Worksheet", and "End Of CTRF Worksheet".

End of CTRF Worksheet

Review this page to identify your next steps.

Click **Hide/Show Errors** to verify if  any corrections need to be made.

Click **Finish** to go to the PAF Workspace. 
The state of the PAF is **CTRF Preparation**.

Project Team: Notify ORSP Activity

1. Click the **Notify ORSP CTRF is Complete** activity to alert ORSP to begin contract negotiation.
2. Enter **Comments**, if applicable.
3. Click **OK**.

Completing this activity opens the full PAF. The PAF state changes to **Proposal Preparation**.

Finish the PAF, as applicable, to route the proposal for unit review.