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## Clinical Trial Routing Form

Quick Reference Card  
for PI/Project Team

### Need Help?

**ITS Service Center:** Technical support <http://its.umich.edu/help/>  
**Phone:** (734) 764-4357 **Email:** [4help@umich.edu](mailto:4help@umich.edu)

### ORSP Project Representatives

<http://orsp.umich.edu/orsp-staff>

**Phone:** (734) 764-5500 **Fax:** (734) 763-4053, 764-8510

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

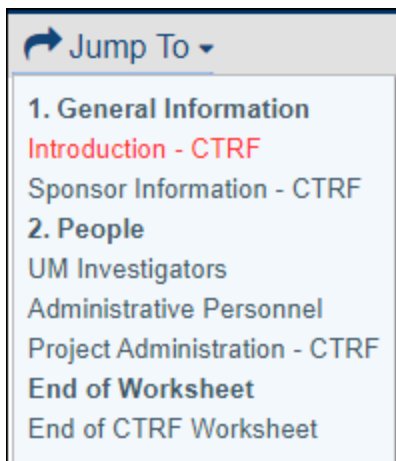
The CTRF can be created in one of two ways:

- 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 CTRF**.  

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.




### 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.