

## IT Manger Sign Technology Control Plan (TCP)

After the Export Control Office (ECO) reviews the Technology Control Plan (TCP), they will send an email notification to request signatures. This procedure contains instructions for Signing the TCP. See [Technology Control Plans & Licenses](#) for more information about TCPs.

### Signing the TCP

Anyone specified as an IT Manager in the Technology Control Plan will be required to Sign the TCP. Signing in eResearch Proposal Management (eRPM):

- Records your approval in the **Recent Activity** list.
- Once all IT Managers have signed, the TCP is automatically routed for Unit Review.

### Technology Control Plan Notification Email

This email displays basic TCP information, such as the ID, title, who received the email, etc.

- Click the email link to access the TCP in eRPM (not shown here).

**Note:** If you are not authenticated to the eRPM system when you click the link in the email, you may need to log in using your username and password.

OR

### Home Workspace

The screenshot shows the eResearch Proposal Management Home Workspace. On the left sidebar, under 'Roles', 'PI & Project Team' is selected (labeled 1). Under 'Support Links', 'Request Admin Personnel Change' is highlighted. The main content area has tabs for PAFs, SUBGs, UFAs, In Progress, Finalized Proposals, Submitted to Sponsor, and Award R. The 'UFAs' tab is selected (labeled 2). Below the tabs, there are sections for 'UFAs With Required Action', 'UFAs Not Yet Signed by PI', 'UFAs Assigned to You for Ad Hoc Review', and 'UFAs Assigned to You for IT Manager Review'. The 'UFAs Assigned to You for IT Manager Review' section contains a table with one item: 'Sample TCP' with ID '17- UFA00092' (labeled 3).

If you're already logged into eRPM,

- Verify that the **PI & Project Team** role is selected.
- Click the **UFAs** tab.
- Click the name of the agreement in the **UFAs Assigned to You for IT Manager Review** list.

## UFA Workspace

**Note:** The UFA will be in the state of **IT Manager Review**.

- Click **Display TCP Summary**. (Or click **View UFA Worksheet** to open and review the TCP).

## TCP Summary

- After reviewing the information in the summary, click **OK**.

If you agree to the terms in the TCP, continue to step 6.

If you need to request changes, skip to step 9.

## UFA Workspace

- Click **IT Manager Sign TCP** from the Activities menu



## Monitoring the TCP

You can access and follow the progress or status of TCPs that you have reviewed from different tabs in your Home Workspace.

TCPs can be accessed from the **In Progress** tab in the states of:

- IT Manager Review - Personnel Making changes
- Unit Review TCP
- Unit Review - TCP Making Changes
- ECO Review Changes
- ECO Finalizing

## Home Workspace

The screenshot shows the eResearch Proposal Management interface. The top navigation bar includes tabs for PAFs, SUBGs, UFAs, In Progress, Finalized Proposals, Submitted to Sponsor, and Award Received. The 'In Progress' tab is selected. Below the navigation bar, there are sections for PAFs, Hardships, UFAs, and IT Manager UFAs. The IT Manager UFAs section contains a table with columns for ID, Name, ID Date Modified, State, PI, Dept, and Deadline. The table lists two items: '17- UFA00122 Idryden Unit Approve test TCP' and '17- UFA00094 Sample TCP'. A red box labeled '1' is placed over the 'In Progress' tab, and a red box labeled '2' is placed over the 'IT Manager UFAs' section.

1. From the Home Workspace, click the **In Progress** tab.
2. Click on the Name in the **IT Manager UFAs** list.

### Notes:

- If you have requested changes, the UFA will be in the state of **IT Manager Review – Personnel Making Changes** until the Key Personnel submits or declines changes.
- An email will be sent notifying you of any required action.
- Once all have signed, the state will change to **Unit Review TCP**.
- Once a TCP gets final approval, its state becomes **Active**. It can be accessed from the **Active** tab under the **IT Manger UFAs** list.

The screenshot shows the navigation bar with tabs for In Progress, Finalized Proposals, Submitted to Sponsor, Award Received, and Active. The 'Active' tab is highlighted with a red box.