

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 <u>Technology</u> 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 uniqname and password.

OR

Home Workspace

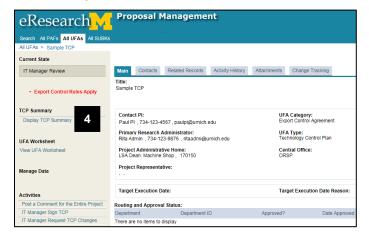


If you're already logged into eRPM,

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



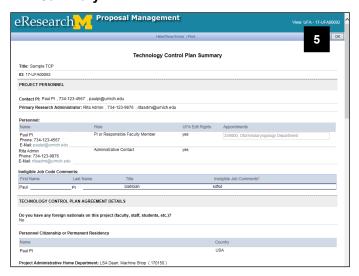
UFA Workspace



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

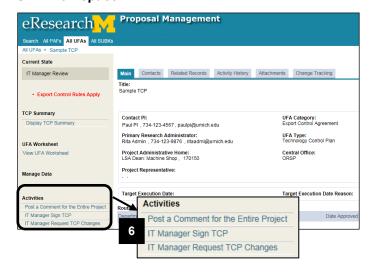


5. After reviewing the information in the summary, click **OK**.

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



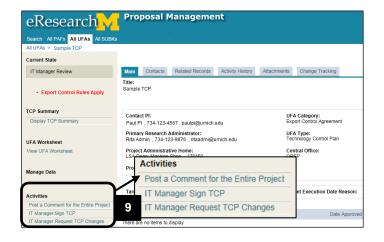
6. Click **IT Manager Sign TCP** from the Activities menu



IT Manager Sign TCP Window



UFA Workspace



7. Enter or click Add to specify Country of Citizenship or Permanent Residency.

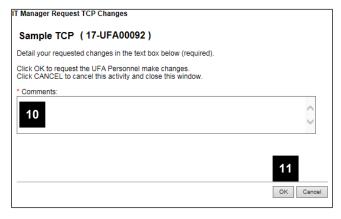
8. Click **OK** to certify that the TCP protects the export controlled information to your satisfaction.

Note: The TCP state will remain IT Manager Review until all IT Managers have signed ("Contact PI" and "Other Investigator or Participant"). Once all have signed, the state will change to Unit Review TCP.

If you need to request changes to the TCP before you sign:

 Click IT Manager Request TCP Changes from the Activities menu.

IT Manager Request Changes Window



- Enter Comments describing the requested changes.
- 11. Click **OK**.

Note: The TCP is routed to the Project Team
Personnel so they can update it, and the
state changes to IT Manager Review –
Personnel Making Changes.



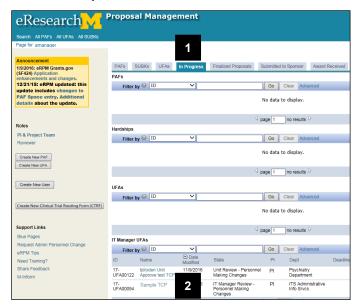
Monitoring the TCP

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



- 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.

