MOU Routing Request (EPM)

The MOU Routing Request form is used to route MOUs for processing and signatures. MOUs are generated by the client agencies and the routing request form is to be completed and submitted by the EPM responsible for the DGS Program under which the project funded by the MOU falls.

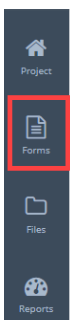
The form is submitted to the BDI group for processing via workflow within ProjectTeam. The BDI group will create the routing slip, route the documents for signatures, and update the record in ProjectTeam with the routing and tracking information as required.

MOU routing request progress can be viewed at any time by opening the submitted request, viewing the Workflow progress section, and viewing the tracing information. You can also configure your Log View for the MOU Routing Requests and view/sort/filter tracking information for one or more requests there.

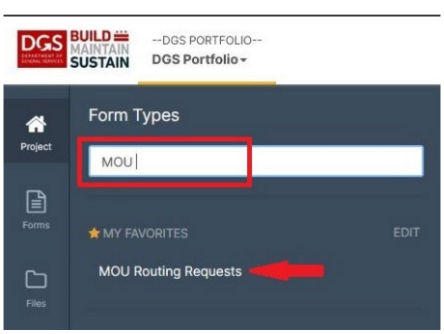
NOTE: The submitting EPM is responsible for obtaining and attaching a copy of the signed MOU from the client agency and any other required supporting documentation from the appropriate source prior to submitting the routing request.

Creating and Submitting an MOU Routing Request

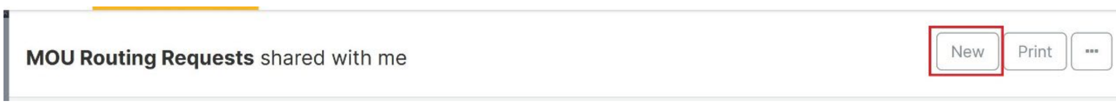
1. Open the **DGS Portfolio** project and click on **Forms** in the navigation menu**.**



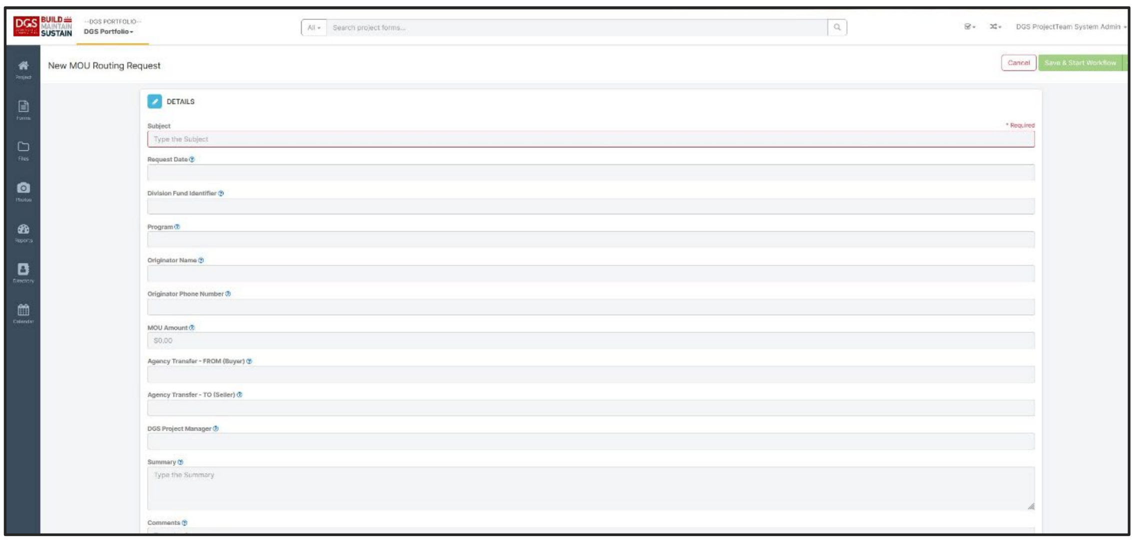
2. In the search field, begin typing **MOU** and the form will appear in the forms list. Click **MOU Routing Requests** to open the log.



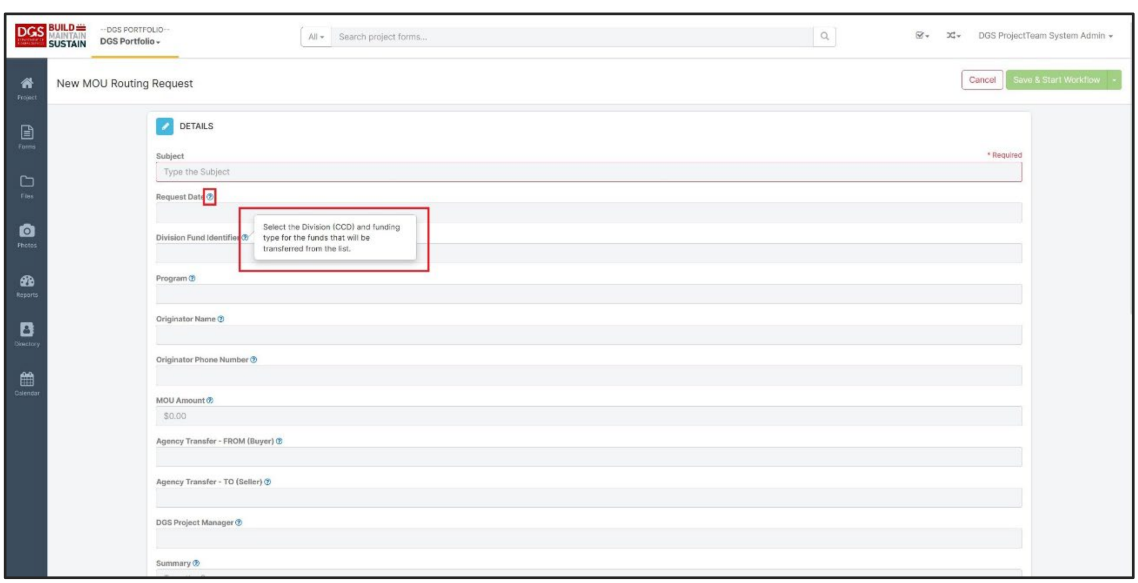
3. Click the **New** button in the upper right corner to create a new MOU Routing Request. The **New MOU Routing Request** details window will open.



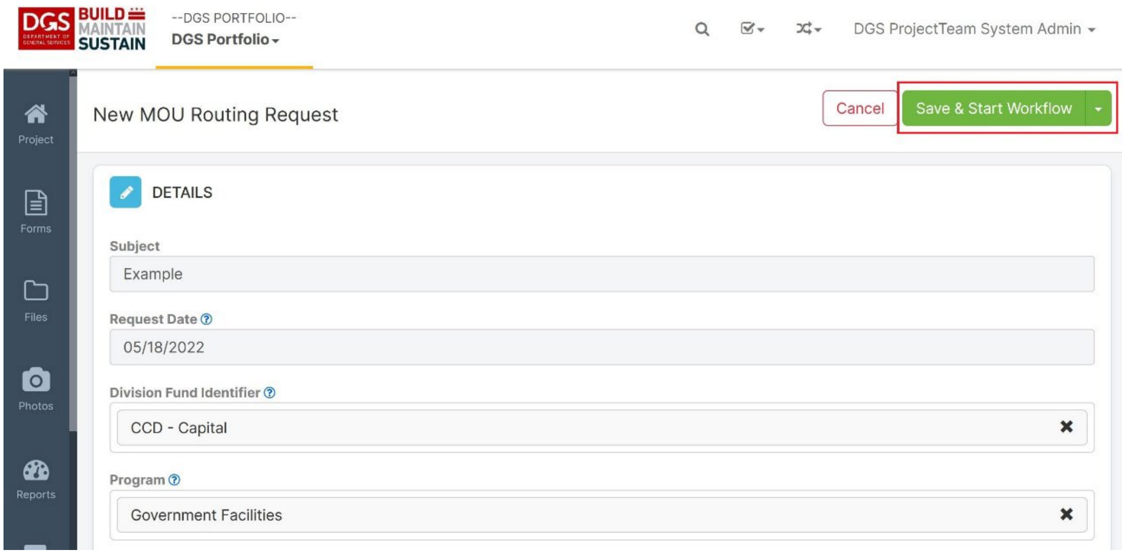
4. Enter the appropriate information in all fields accessible to you on the form. Do not leave blank fields.



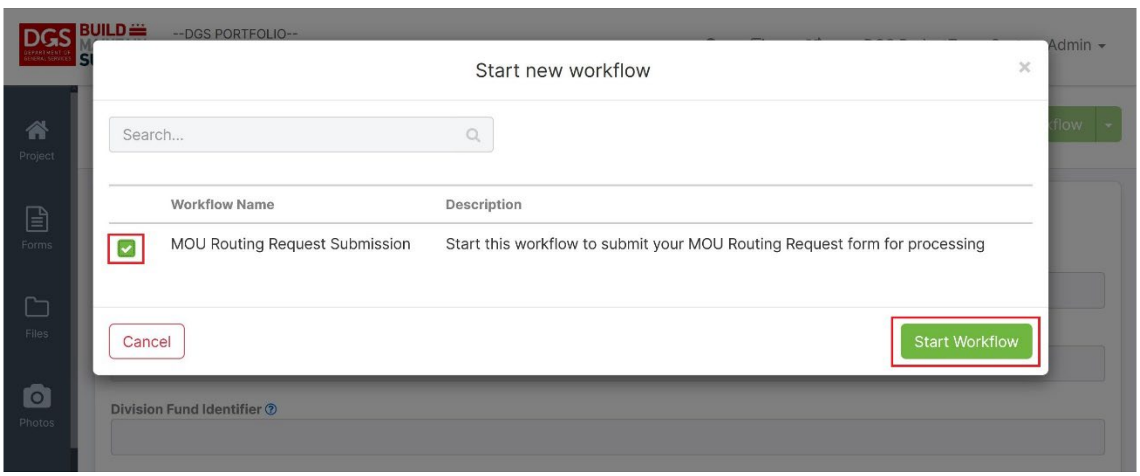
5. Use the **Tool Tips** for information regarding the specific requirements and expected data for each field. Click on the blue circled question mark next to each field name to see the **Tool Tip** for that field.



6. Click on the **Save & Start Workflow** button at the top-right of the form when all the fields have been completed.



7. Select the **MOU Routing Request Submission** workflow with the checkbox and then click the **Start Workflow** button.

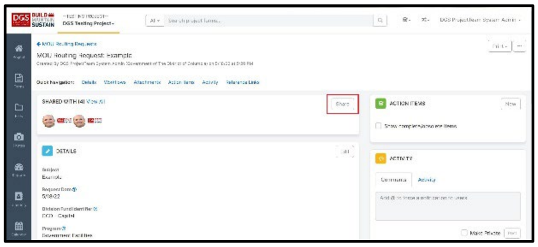


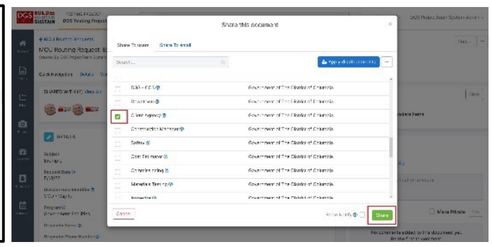
8. Click **Share** and share the record with all applicable share groups that were not included in the autoshare from the workflow. At minimum, share with the following **Share Groups** not included in the workflow:

Appropriate Client Agency Share Group

Other DGS Divisions involved with the MOU

Applicable EPM Share Group





9. Drag and drop a copy of the signed MOU and any other supporting documentation in the **Attachments** section of the record.