

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.

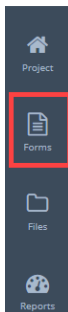
The form is submitted to the BDI group for processing via workflow within ProjectTeam. The BDI group will create the routing slip, route the documents for signatures, and update the record in ProjectTeam with the routing and tracking information as required.

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

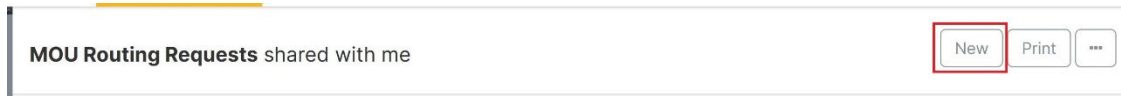
1. Open the **DGS Portfolio** project and click on **Forms** in the navigation menu.



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.



- 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.



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

 A screenshot of the "New MOU Routing Request" form. The form is titled "New MOU Routing Request" and has a "Cancel" button and a "Save & Start Workflow" button. The form is divided into sections: "DETAILS" (with a blue checkmark icon), "Summary", and "Comments". The "DETAILS" section contains several input fields: "Subject" (with a red asterisk indicating it is required), "Request Date", "Division Fund Identifier", "Program", "Originator Name", "Originator Phone Number", "MOU Amount" (set to \$0.00), "Agency Transfer - FROM (Buyer)", "Agency Transfer - TO (Seller)", "DGS Project Manager", and "Summary". Each field has a blue question mark icon next to its label, which is a "Tool Tip" icon.

- 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.

 A screenshot of the "New MOU Routing Request" form, similar to the previous one, but with a "Tool Tip" popup displayed. The popup is a white box with a red border, containing the text: "Select the Division (COD) and funding type for the funds that will be transferred from the list." The popup is positioned over the "Division Fund Identifier" field, which has a blue question mark icon next to its label.

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

The screenshot shows the 'New MOU Routing Request' form. At the top right, there are two buttons: 'Cancel' and 'Save & Start Workflow'. The form fields are as follows:

- Subject:** Example
- Request Date:** 05/18/2022
- Division Fund Identifier:** CCD - Capital
- Program:** Government Facilities

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

The screenshot shows the 'Start new workflow' dialog box. It contains a search bar and a table with the following data:

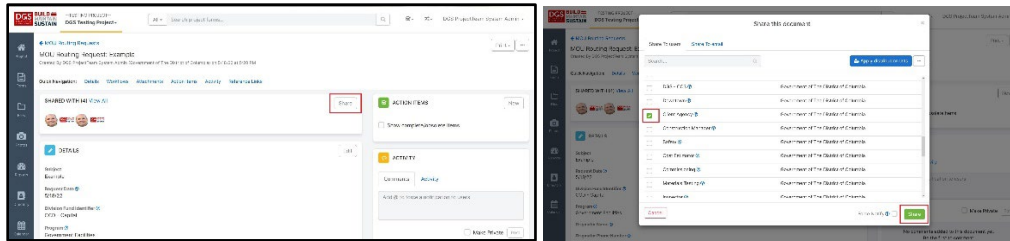
Workflow Name	Description
<input checked="" type="checkbox"/> MOU Routing Request Submission	Start this workflow to submit your MOU Routing Request form for processing

At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Start Workflow'.

- 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.

