SPA & SPAC QUARTERLY UPDATE MEETING

FIRST QUARTER, 2011

Today's Agenda

▸ Introductions of the SPA & SPAC Teams

▸ Changes to the Account Set Up and Maintenance Processes

▸ Coeus Updates

▸ Subcontracts

▸ Invoicing Reminders

▸ Q&A Session

Introductions: Team B

SPA	SPAC
Greg Sorensen, Manager -Towanda Gilliam -TBN, SP Administrator	Tegan Baumann, Senior Accountant -Frankie Thomas -Amy LaFevers

Assignments:

Comparative Medicine, Complementary Medicine, Emergency Medicine, IHV, Infectious Disease, Neurology, Physical Therapy, Psychiatry, Surgery, School of Dentistry

Introductions: Team C

SPA	SPAC
Manager- TBN -Debbie Griffith -Venzula Harris -Cynthia McKoy	Steve Bonaccorsi, Senior Accountant -Letisha Butler -Dan Grote -Tammy Bloss

Assignments:

Anatomy/Neurobiology, Biochem/Molec Biology, Cancer Center, Ctr Stem Cell Bio, CVD, DOM Chair, Dermatology, MARC, Microbiology, Physiology, Radiation Oncology, School of Social Work, School of Nursing

Introductions: Team D

SPA	SPAC
Leerin Shields, Manager -Marcos Garza -Dinnise Felder	Steven Wood, Senior Accountant -Rosetta Elicerio -Shernett Wynter

Assignments:

Cardiology, Diag Radiology, Epi & Public Health, Family Medicine, Gastroenterology, General Internal Medicine, IGS, Nephrology, Neurosurgery, Orthopedics, Rheumatology, School of Law

Introductions: Team E

SPA	SPAC
Danielle Brown, Manager -Kachana Tirasuth -Carol Foreman	Likivu Speaks, Senior Accountant -Brenda Hester -Lina Stanis -TBN

Assignments:

Anesthesiology, Center for Health Policy, CVID, Gerontology, National Study Center, OB/Gyn, Opthalmology, Otorhinolaryngolgy, Path/DMR, Pharmacology, Pulmonary Med, Endocrinology/Diabetes, Pediatrics, School of Pharmacy

SPA Introductions

- SPA Subcontract Team
  - Pegah Parsi
  - Richard Ingrao
  - Beverly Law

- Associate Director: Amanda Snyder

- Executive Director: Dennis Paffrath

SPAC Introductions

- Managers:
  - Teams B, C & Collections
    - Cheryl Williams-Smith
  - Teams D, E & Account Clean-Up
    - Libre' Jones

- Director: Shari Swisher

- Assistant Vice President: Lynn McGinley

Account Set Up Changes

- SPA & SPAC formed a joint committee
- Changes designed to improve efficiencies, reduce wait time and decrease errors
- Most changes are seamless to our end users

NIH New Award Example

Workflow for New NIH Awards

Award Received via email by SPA and SPAC simultaneously and is available to view in the NIH Commons.

⬇

SPAC reviews Award Document and information in Coeus Institute Proposal (IP) to obtain data for award set up in eUMB.

⬇

After SPAC sets up award in eUMB, an email notification is sent to SPA & Departmental Distribution List (including Coeus IP #, Project ID(s), and eUMB Award ID #).

At this time, chartstring information can be obtained by accessing Grants Projects View in eUMB.

⬇

After SPA enters award into Coeus Award, an email notification is sent to Departmental Distribution List with the Coeus Award record number.

At this time, award documents and associated data are available for view in the Coeus Award record.

Non-NIH New Award Example

Workflow for New non-NIH Awards

Award Received by SPA, and SPA verifies Coeus Proposal routing.

⬇

SPA uploads the Award Document to Coeus Institute Proposal's (IP) Negotiations module and sends a notification email to SPAC, Department Distribution List, and PI indicating that a new award document is available in Coeus IP/Negotiations.

⬇

After SPAC sets up award in eUMB, an email notification is sent to SPA & Departmental Distribution List (including Coeus IP #, Project ID(s), and eUMB Award ID #).

At this time, chartstring information can be obtained by accessing Grants Projects View in eUMB.

⬇

After SPA enters award into Coeus Award, an email notification is sent to Departmental Distribution List with the Coeus Award record number.

At this time, award documents and associated data are available for view in the Coeus Award record.

Other Award Actions

Workflow for Modifications

Award documentation received by SPA, and SPA verifies Coeus Proposal routing and authorization for action, as appropriate.

⬇

SPA uploads the document to Coeus Institute Proposal's (IP) Negotiations module and sends a notification email to SPAC, Department Distribution List, and PI indicating that award documentation is available in Coeus IP/Negotiations.

⬇

After SPAC makes appropriate changes in eUMB, an email notification is sent to SPA & Departmental Distribution List (including Coeus IP #, Project ID(s), and eUMB Award ID #).

At this time, revised chartstring information can be obtained by accessing Grants Projects View in eUMB.

⬇

After SPA enters appropriate changes into Coeus Award,an email notification is sent to Departmental Distribution List with the Coeus Award record number.

At this time, revised award documents and associated data revisions are available for view in the Coeus Award record.

Note: This workflow does not apply to budget modifications which are sent directly to SPAC

Summary of Changes

▸ Award set-up and maintenance will be handled by the assigned team in SPAC

▸ Multi-year project ID's will be established in advance

▸ SPA will not be sending Notice of Awards

  ▸ Available in Coeus when SPA is done processing

    ▸ First available in Coeus IP, then available in Coeus Award

  ▸ NIH are available online using Commons

    ▸ Contact Colin Hunter in SPA for access to the NIH Commons

    ▸ Have your PI's delegate authority to you for access to their grants

    ▸ Step by step instructions for delegating authority in Commons: http://era.nih.gov/commons/steps_commons.cfm

▸ Awards should be reviewed using the Grants Project View

  ▸ Departments will no longer be receiving the Award Initiation Sheet

About the Budget

▸ SPAC will be viewing budget in Coeus Proposal for set up of eUMB Budget

▸ If no detailed budget routed in Coeus Proposal Budget, only Direct and Indirect Costs will be set up in eUMB

▸ If awarded budget is different from proposed budget, procedure remains the same:

  ▸ Less than or equal to 10%, SPAC enters a straight percentage change

  ▸ Greater than 10%, SPAC enters direct/indirect costs only

  ▸ Budget modifications can be processed by SPAC after award set up as requested by the Department via the Budget Modification Request Form at http://www.fincsvc.umaryland.edu/images/BudgetMod.pdf.

Grant Project View

▶ Custom page designed with important award information for departments

▶ Page is designed to look at one Project at a time but it includes the related Award data

▶ Navigating to the Grants Project View
  ▶ Grants> Awards> UMB Grant Project View

Requesting Access

▶ Use the eUMB Financials User Authorization form located on the CITS Forms page at http://www.umaryland.edu/cits/forms/.

eUMB Financials

- User Instructions eUMB Financials
- User Authorization Form Affiliate
- User Authorization Form Employee
- Secured File Transfer Protocol (SFTP) Access Form

▶ The role name is Dept Grant Viewer

Grant Project View

Grant Project View

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Project ID:	begins with ▾	🔍
Award ID:	begins with ▾	🔍
PC BU:	begins with ▾	🔍
Award PI Name:	begins with ▾	
Sponsor ID:	begins with ▾	🔍
Project Dept ID:	begins with ▾	🔍

☐ Case Sensitive

[Search]   [Clear]   Basic Search   💾 Save Search Criteria

Search Dropdown:

begins with	<, <=
contains	in
=	>, >=
not =	between

Grant Project View

Grant Project View

Business Unit: [00192] ⭐   RF ImageNow

PROJECT INFORMATION

Project:	[ ]	FY11 MedStar Health	Primary?	N
Project Status:	Open		Eff. Status:	Active
Start Date:	07/01/2010	End Date:	06/30/2011	
Budget Start:	07/01/2010	Budget End:	06/30/2011	
Funded Amount:				

PI:	005445	Rodriguez De Bittner,Magaly
Dept:	12302500	PPS General
Location:	OFF	
Sponsor Ref#:		CFDA#:

⭐ Errors cannot be corrected; a new project must be established.

FA Rate Type:		FA Rate Eff. Date:
FA Base:		FA Rate %:
Sr. Accountant:	Speaks,Likivu K.	Project Setup:

AR Items by Project

Key Fields: PCBU, Project Status, Budget Dates (restricts spending), Funded Amount & Senior Accountant

Grant Project View

AWARD INFORMATION

Award:	[ ]	MEDSTAR HEALTH FY09 TO FY11
Award Status:	Accepted	
Start Date:	07/01/2008	**End Date:** 06/30/2011
Awarded Amount:	$223,296.00	**Funded Amount:** $223,296.00
Purpose:	152	Sponsored Training
Sponsor:	002250	⭐ MedStar Research Institute
Sponsor Ref#:	MEDSTAR HEALTH FY09	
Sponsor Type:	CORP	Corporation- USA
Prime Sponsor:		
Contract Limit:	$223,296.00	**Contract Status:** ACTIVE
CFDA#:		**LOC Doc ID#:**
PI:		
Dept:		

AR Items by Award

Key fields: Awarded Amount and Contract Limit

Grant Project View

PRIMARY BILL PLAN

Status:	Ready
Billing Specialist:	Likivu Speaks
Type:	DLB
Cycle:	DELIVER
Bill By ID:	PROJECT

Prepaid Bill Plans

COMBO EDIT CHARTFIELDS

Customize | Find | View All | First 1 of 1 Last

	Rule	Owner Dept	Fund	Program
1	2010RF	12302500	183	152

Key Fields: Award Type and Billing Cycle

Budgets and Raven

▸ Please keep in mind:

▸ Budgets will not be available in Raven until the day after you receive the email notification

▸ HRMS transactions can be processed upon receipt of the email notification

▸ Preawards can only be viewed on "All Activities" until the award is finalized

▸ Deliverable projects cannot be viewed in Raven until a transaction has posted (expense, invoice, encumbrance)

Coeus Updates-Institute Proposal Module

After signing onto Coeus, Go to Maintain > Institute Proposal

Coeus Updates-Institute Proposal Module

Type in the Institute Proposal Number that was provided to you via email from SPAC.

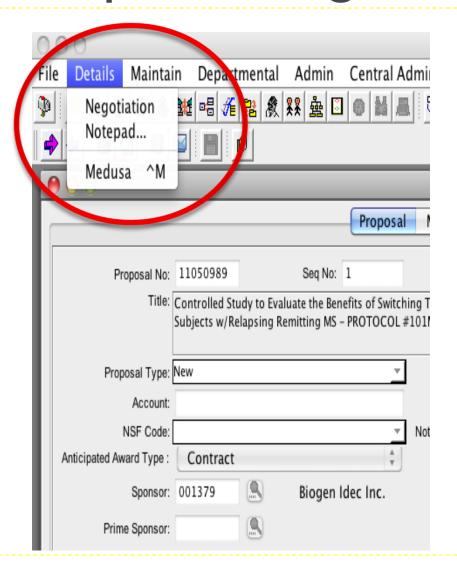# Coeus Updates-Institute Proposal Module

Double Click on the highlighted selection, this will take you into the Coeus record.

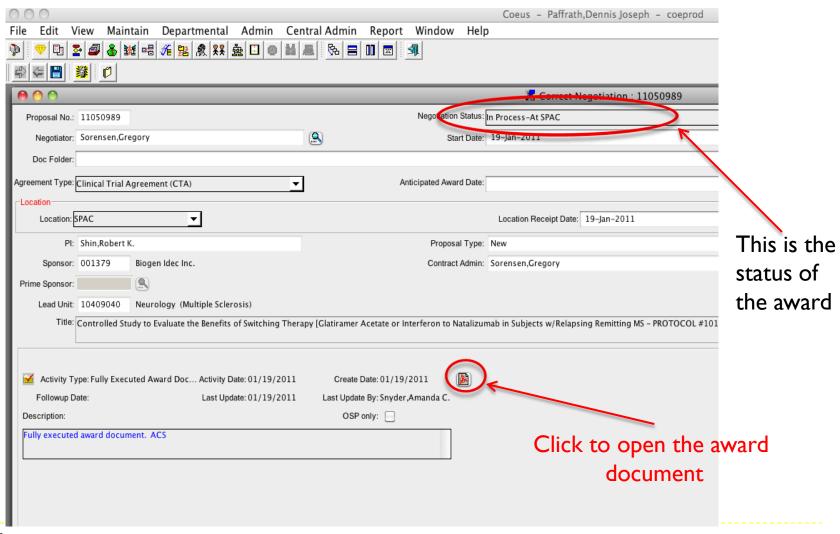# Coeus Update-Institute Proposal Module

Coeus Update-Negotiation Module
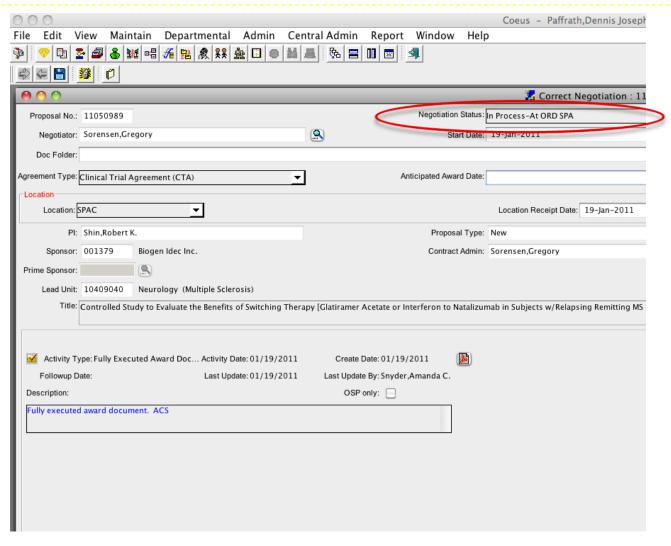

From the
Institute Proposal record

Go to:

Details >

>Negotiation

Coeus Update-Negotiation Module

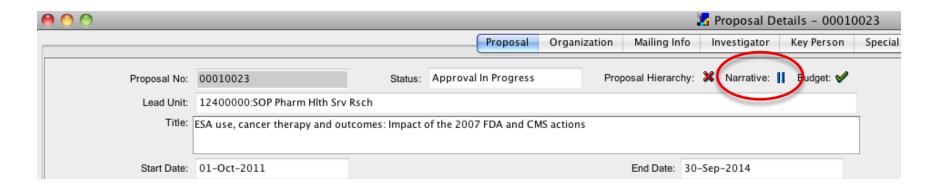# Coeus Update-Negotiation Module

Coeus Update-Award Doc

CLINICAL TRIAL AGREEMENT
BY BETWEEN AND AMONG
BIOGEN IDEC INC.
AND
UNIVERSITY OF MARYLAND BALTIMORE
AND
UNIVERSITY OF MARYLAND MEDICAL CENTER

This Agreement is made between **BIOGEN IDEC INC.**, a Delaware corporation, having a place of business at 133 Boston Post Road, Weston, MA 02493, together with its Affiliates ("**Biogen Idec**"), **UNIVERSITY OF MARYLAND, BALTIMORE**, a constituent institution of the University System of Maryland, an agency of the State of Maryland, having as address at 620 W. Lexington Street, 4th Floor, Baltimore, MD 21201 (the "**Institution**"), and **UNIVERSITY OF MARYLAND MEDICAL CENTER**, a health care facility owned and operated by University of Maryland Medical System Corporation, a Maryland Corporation with a principal place of business at 22 S. Greene Street, Baltimore, MD 21201 ("**UMMC**").
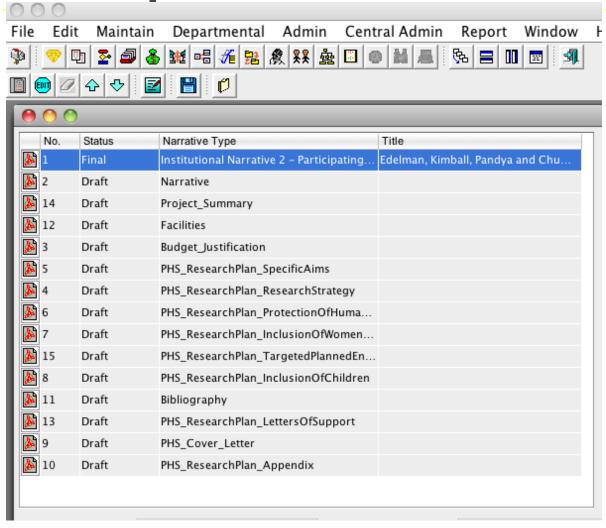
WHEREAS, Biogen Idec is sponsoring a clinical study entitled: "A Multicenter, Randomized,
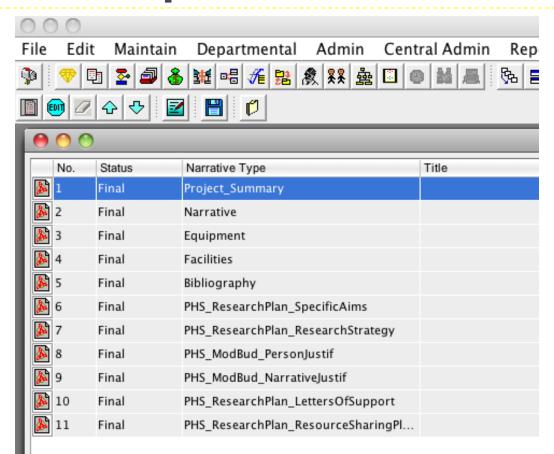
Coeus Update-Final/Draft

If the Narrative has the "PAUSE" or double Blue Lines, that means at least one of the narrative documents are in Draft status. You can route your proposal when the narratives are in DRAFT status
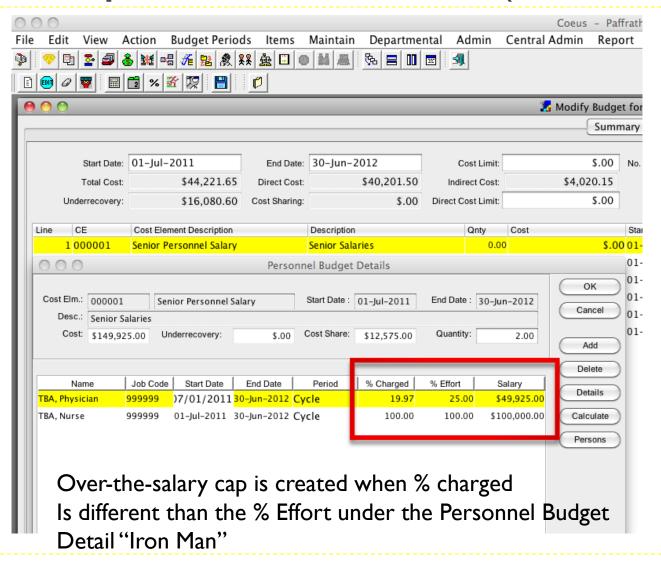
Coeus Update – Final/Draft
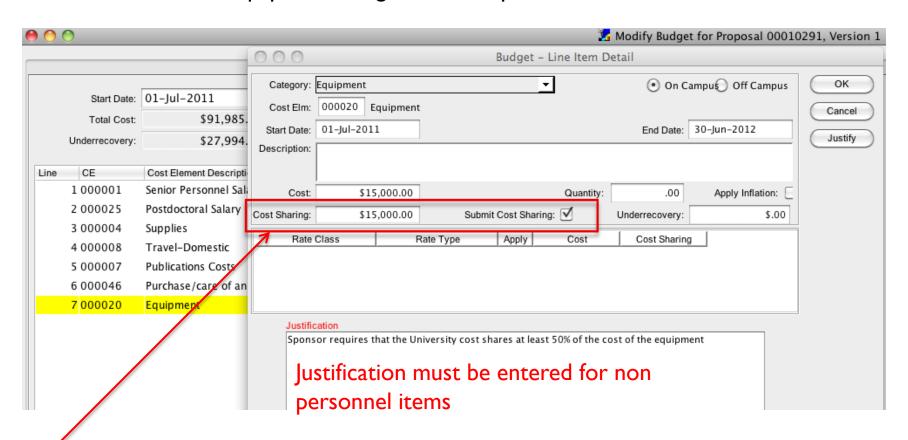
Coeus Update-Final/Draft

If all documents are in FINAL status, SPA will submit the Proposal. SPA will not contact to verify that the documents are truly in Final status

Coeus Update-Cost Share (Personnel)

Over-the-salary cap is created when % charged
Is different than the % Effort under the Personnel Budget
Detail "Iron Man"

Coeus Update – Cost Share (non personnel)

Double Click the Equipment Budget Line to open the "Line Item Detail"

Justification must be entered for non personnel items

Insert the Cost Sharing Amount and make sure that the Submit Cost Sharing box is clicked in order for this to be submitted to Sponsor.
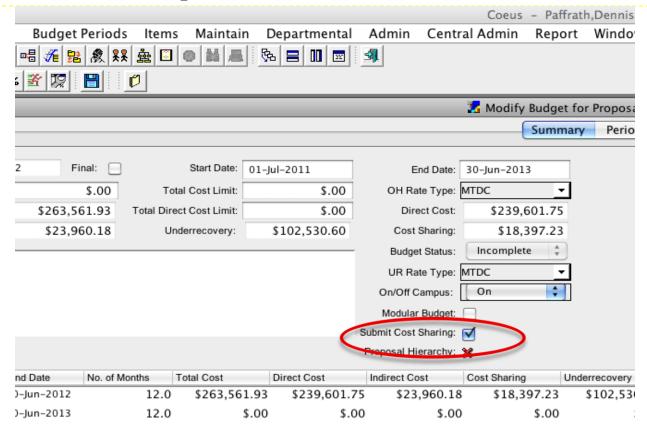
Coeus Update-Cost Share

To submit cost share to sponsor when using S2S (Grants.gov) make sure that the "Submit Cost Sharing" is checked…uncheck the box so that no Cost Sharing is submitted. OR…...

Coeus Update-Cost Share

On the Budget Summary Page, **unclick** the box if you do not want Cost Sharing to be submitted to Sponsor (via Grants.gov).

Subcontract Changes

▸ Department must email the Purchase Order number to Subteam@ordmail.umaryland.edu as soon as it is received.

▸ Sub-recipient agreements will not be started or executed on pre-award accounts, unless the prime award has standard terms and conditions (i.e. NIH R01).

▸ All eSuRF records must be complete or the Subcontract Team will reject the record. Modifications must be made to the original record and resubmitted. DO NOT create a new eSuRF record.

NIH xTrain

▶ What is xTrain?

  ▸ Module in the NIH Commons system

  ▸ Electronically prepare & submit PHS 2271 Statement of Appointment forms and/or PHS 416-7 Termination Notices

▶ Which mechanisms does xTrain support?

  ▸ Kirschstein-NRSA & NLM institutional training grants (T-series)

  ▸ Kirschstein-NRSA individual fellowships (F-series), **termination notices only**

  ▸ Research education awards (R25, R90) and Institutional career development awards (K12, KL2, KM1), *Only if the program requires PHS 2271 and/or PHS 416-7 Form*

NIH xTrain

▸ Who needs to access xTrain?

  ▸ PI of Training Grant

    ▹ Initiates and Submits Appointment Form and/or Amendments to NIH

    ▹ Initiates and routes Termination Notices

  ▸ PI Delegate

    ▹ Can perform all PI functions EXCEPT submission of Appt Form

  ▸ Trainee

    ▹ Completes Appt Forms and Term Notices and routes back to PI

  ▸ SPA (Business Official in Commons)

    ▹ Submits Termination Notice to NIH

▸ Where can I find more more detailed information?

    ▹ http://era.nih.gov/training_career/index.cfm

Invoicing Reminders

- Standards (no backup)
  - Will only bill expenses posted in the system, no adjustments made to interim bills

- Standards (with backup)
  - Backup must reconcile to the expense posted in Raven

  - Invoice and backup should be sent together from SPAC

- Deliverables
  - Complete the Deliverable Invoice Receivable Request Form:

    http://www.fincsvc.umaryland.edu/rf/images/DeliverableInvoice-ReceivableRequestForm.xls

  - Future collection efforts are based on the invoice date

  - Include a copy of the invoice

Questions and Answers

▸ The presentation will be available on both the SPA and SPAC websites.

▸ Mark your calendars for our 2011 update meetings:
  ▸ April 28th, July 28th & October 27th
  ▸ Meetings held from 3-4:30pm in HSF II Auditorium

▸ Thank you for joining us today!