

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

Greg Sorensen, Manager
-Towanda Gilliam
-TBN, SP Administrator

SPAC

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

Leerin Shields, Manager
-Marcos Garza
-Dinnise Felder

SPAC

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

Danielle Brown, Manager
-Kachana Tirasuth
-Carol Foreman

SPAC

Likivu Speaks, Senior
Accountant
-Brenda Hester
-Lina Stanis
-TBN

Assignments:

Anesthesiology, Center for Health Policy, CVID, Gerontology,
National Study Center, OB/Gyn, Ophthalmology,
Otorhinolaryngology, 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.

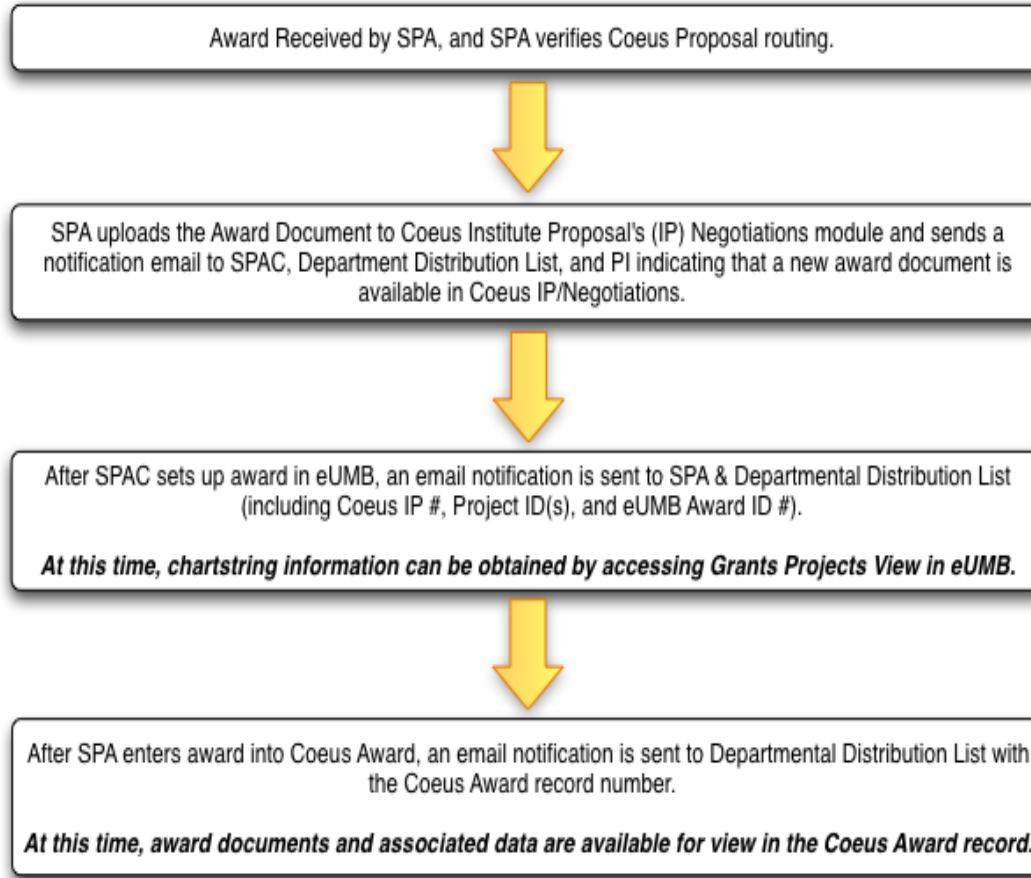


After SPA enters award into Coeus Award, an email notification is sent to Departmental Distribution List with the Coeus Award record number.

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



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

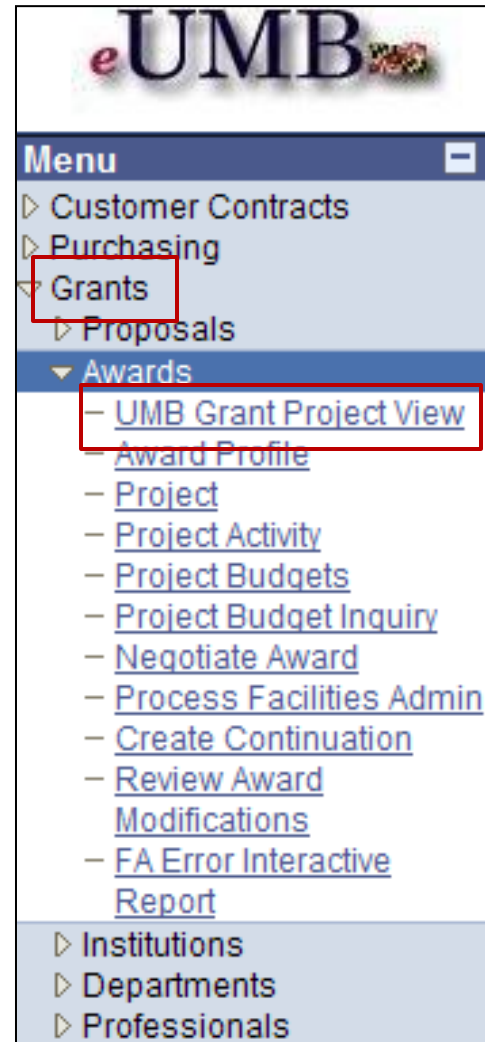
- ▶ Award set-up and maintenance will be handled by the assigned team in SPAC
- ▶ Multi-year project ID's will be established in advance
- ▶ SPA will not be sending Notice of Awards
 - ▶ Available in Coeus when SPA is done processing
 - ▶ First available in Coeus IP, then available in Coeus Award
 - ▶ 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



University of Maryland Baltimore
Center for Information Technology Services
eUMB Financials User Authorization Form and System Access Agreement
Department - Employee of UMB

ABC Ticket # _____

New - User does not currently have a User ID for the eUMB system - add user

Change - User currently has a User ID for the eUMB system - change access and/or role

Delete - Completely remove User's access to the eUMB system - delete user

User Information - Please type or print

| | | |
|-----------------------------|----------------------|-------------------|
| User Name (Last, First, MI) | Date | School/Department |
| | | |
| eUMB Employee ID | Campus Email Address | Campus Phone |
| | | |

Department Roles

| Role | Assign Role | Remove Role | Workflow Route Controls |
|-----------------------------------|-------------|-------------|-------------------------|
| Requester | | | |
| Requisitioner | | | |
| Dept Requisition Approver | | | |
| Receiver | | | |
| Pro Card Viewer | | | |
| Pro Card Requisitioner | | | |
| Dept JE Initiator | | | |
| Dept Grant Viewer | X | | |
| Dept Reporter | X | | |

Comments

Please add the Dept Grant Viewer role to my current profile. Thank you

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:

Award ID:

PC BU:

Award PI Name:

Sponsor ID:

Project Dept ID:

Case Sensitive

[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 | CFDA#: | |
| Sponsor Ref#: | | FA Rate Eff. Date: | |
| FA Rate Type: | | FA Rate %: | |
| FA Base: | | Project Setup: | |
| Sr. Accountant: | Speaks, Likivu K. | | |

[AR Items by Project](#)

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

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



Grant Project View

| AWARD INFORMATION | | | |
|-----------------------------------|--|----------------------------|--------------|
| Award: | <input type="text"/> 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: | <input type="text"/> | | |
| Dept: | <input type="text"/> | | |
| 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 [Prepaid Bill Plans](#)
Cycle: DELIVER
Bill By ID: PROJECT

COMBO EDIT CHARTFIELDS

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

| | <u>Rule</u> | <u>Owner Dept</u> | <u>Fund</u> | <u>Program</u> |
|---|-------------|-------------------|-------------|----------------|
|  | 1 2010RF | 12302500 | 183 | 152 |

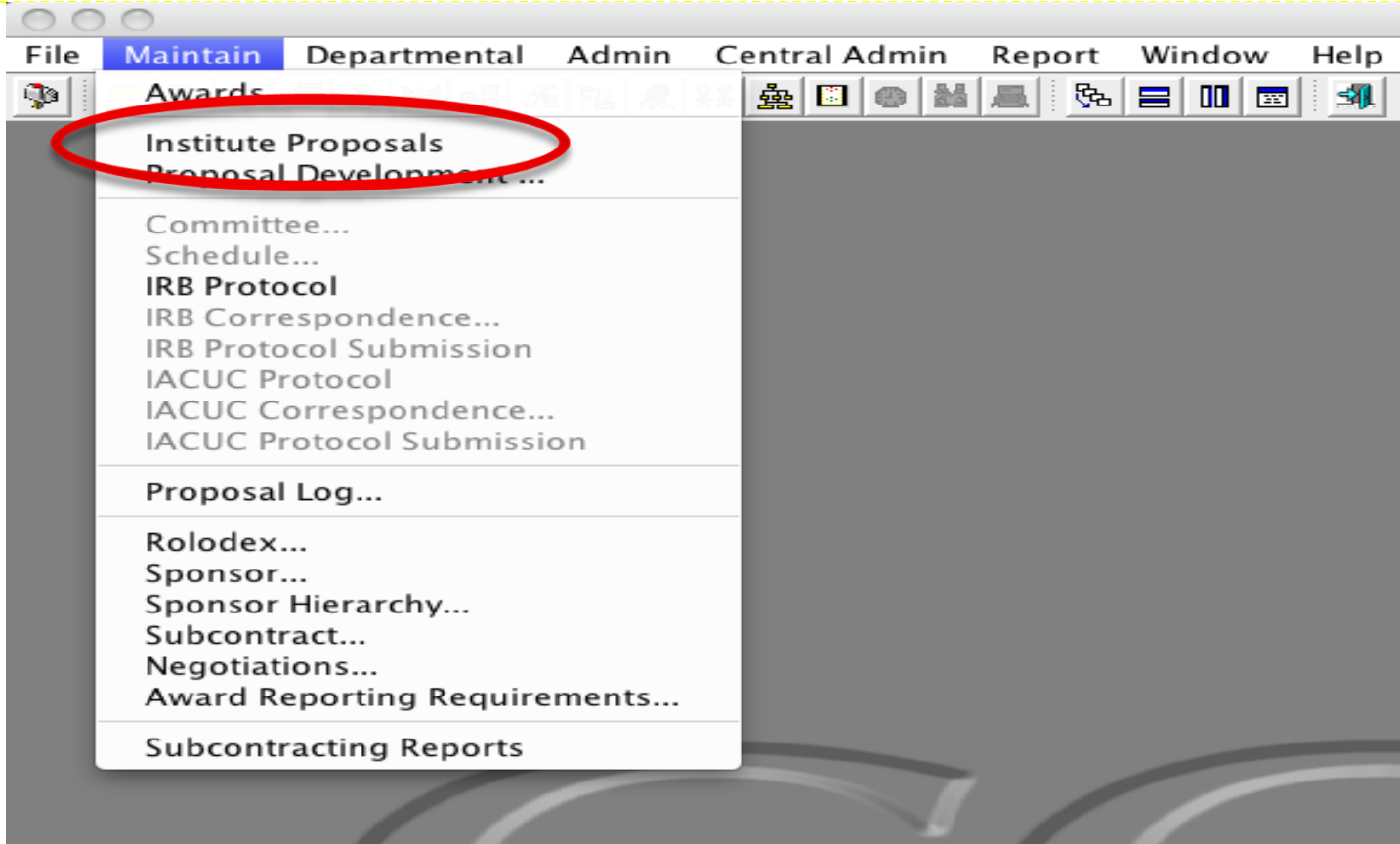
Key Fields: Award Type and Billing Cycle



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)

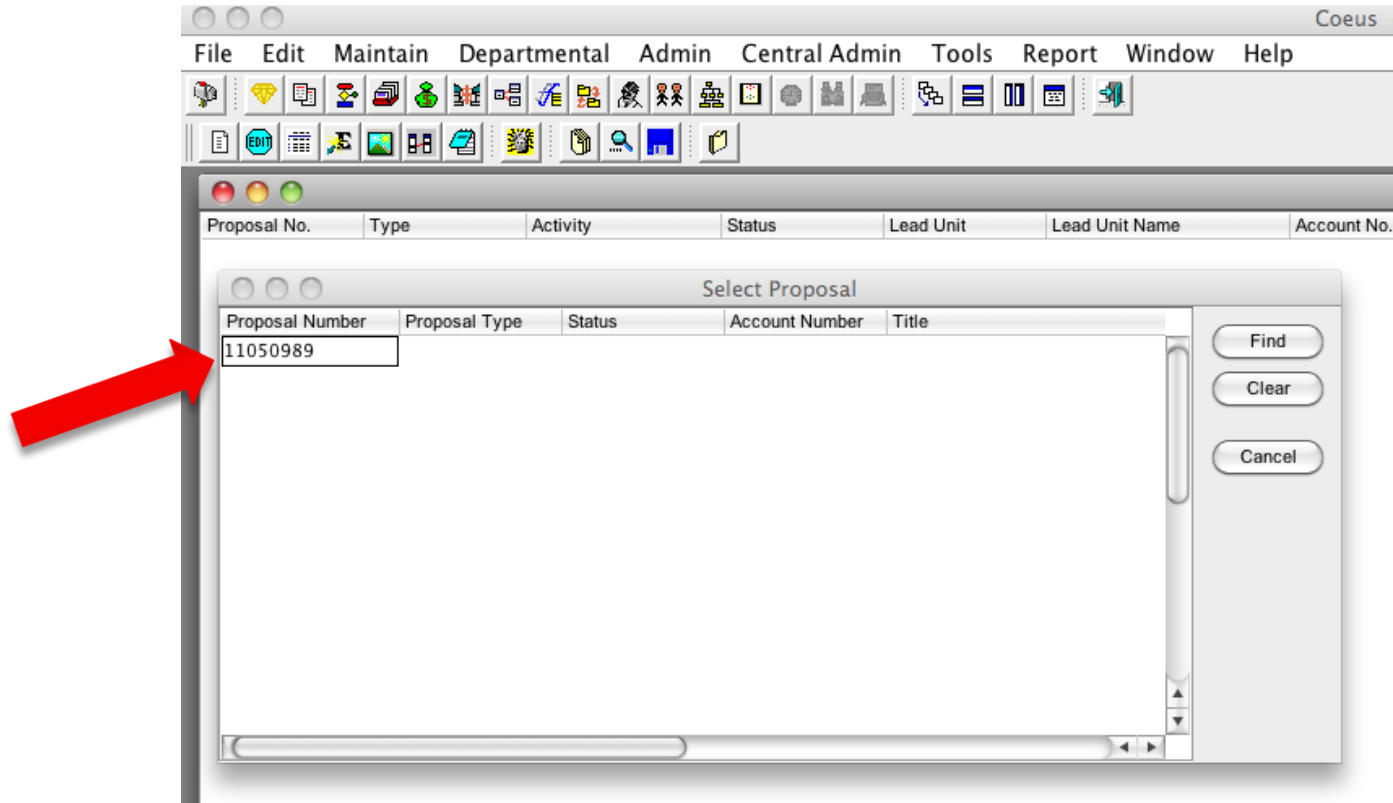
Coeus Updates-Institute Proposal Module



After signing onto Coeus, Go to Maintain > Institute Proposal

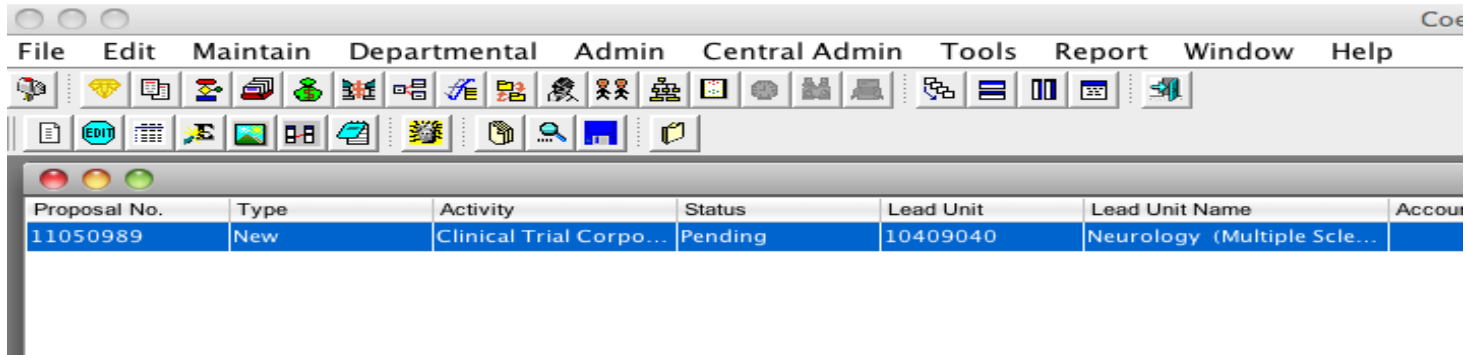


Coeus Updates-Institute Proposal Module



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

Coeus Updates-Institute Proposal Module



The screenshot shows the Coeus software interface. At the top is a menu bar with the following items: File, Edit, Maintain, Departmental, Admin, Central Admin, Tools, Report, Window, and Help. Below the menu bar is a toolbar with various icons. The main area displays a table with the following data:

| Proposal No. | Type | Activity | Status | Lead Unit | Lead Unit Name | Account |
|--------------|------|-------------------------|---------|-----------|----------------------------|---------|
| 11050989 | New | Clinical Trial Corpo... | Pending | 10409040 | Neurology (Multiple Scl... | |

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

Coeus Update-Institute Proposal Module

Coeus - Paffrath,Dennis Joseph - c

File Details Maintain Departmental Admin Central Admin Report Window Help

Display Institute Proposal 11050989

Proposal Mailing Info Investigators Key Person Cost Sharing IDC rates

Proposal No: 11050989 Seq No: 1 Award Number: Status: Pending

Title: Controlled Study to Evaluate the Benefits of Switching Therapy [Glatiramer Acetate or Interferon to Natalizumab in Subjects w/Relapsing Remitting MS - PROTOCOL #101MS325 [SURPASS STUDY]

Proposal Type: New Sponsor Prpsl No: Activity Type: Clinical Trial Corporate

Account: NSF Code: Notice Of Opportunity:

Anticipated Award Type: Contract

Sponsor: 001379 Biogen Idec Inc.

Prime Sponsor:

| | Initial Period | Total Period | Grad Students |
|------------------------|---------------------|---------------------|---|
| Request Start Date: | 01-Dec-2010 | 01-Dec-2010 | Headcount: 0 Person Months: .00 |
| Request End Date: | 30-Nov-2011 | 30-Nov-2013 | Account Type: <input type="radio"/> Research <input type="radio"/> Fund |
| Total Direct Cost: | \$95,017.00 | \$252,807.00 | Subcontract <input type="checkbox"/> |
| Total Indirect Cost: | \$28,505.10 | \$75,842.10 | Prop Create Date: 19-Jan-2011 |
| Total All Cost: | \$123,522.10 | \$328,649.10 | Initial Contract Admin: Sorensen,Gregory |

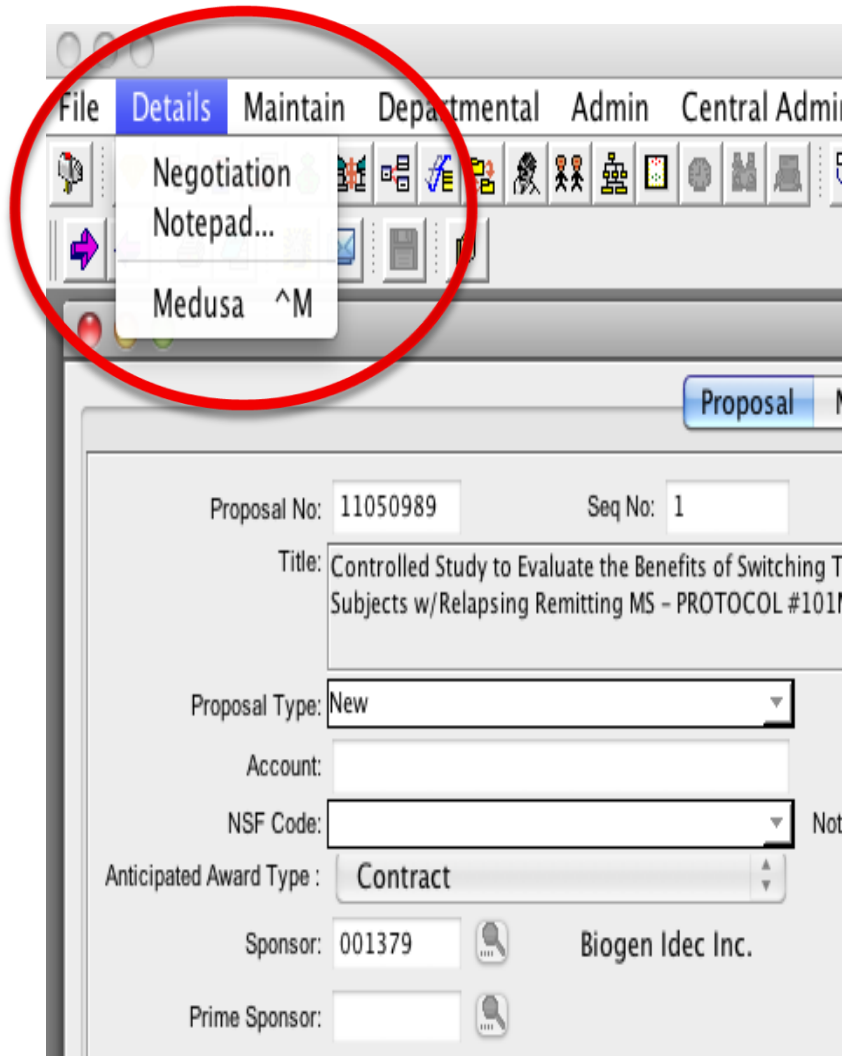
Opportunity Id: CFDA No: .

Summary/Comments:

Last Update: 19-Jan-2011 11:55 AM Update User: Snyder,Amanda C.



Coeus Update-Negotiation Module



From the
Institute Proposal record

Go to:

Details >

>Negotiation



Coeus Update-Negotiation Module

The screenshot displays the Coeus Negotiation Module interface. At the top, the window title is "Coeus - Paffrath,Dennis Joseph - coeprod". The menu bar includes "File", "Edit", "View", "Maintain", "Departmental", "Admin", "Central Admin", "Report", "Window", and "Help". The toolbar contains various icons for file operations and navigation.

The main content area shows the following details for a negotiation:

- Proposal No.: 11050989
- Negotiator: Sorensen, Gregory
- Doc Folder: (empty)
- Agreement Type: Clinical Trial Agreement (CTA)
- Anticipated Award Date: (empty)
- Location: SPAC
- Location Receipt Date: 19-Jan-2011
- PI: Shin, Robert K.
- Proposal Type: New
- Sponsor: 001379 Biogen Idec Inc.
- Contract Admin: Sorensen, Gregory
- Prime Sponsor: (empty)
- Lead Unit: 10409040 Neurology (Multiple Sclerosis)
- Title: Controlled Study to Evaluate the Benefits of Switching Therapy [Glatiramer Acetate or Interferon to Natalizumab in Subjects w/Relapsing Remitting MS - PROTOCOL #101

At the bottom, the "Activity" section shows:

- Activity Type: Fully Executed Award Doc... Activity Date: 01/19/2011 Create Date: 01/19/2011
- Followup Date: (empty) Last Update: 01/19/2011 Last Update By: Snyder, Amanda C.
- Description: Fully executed award document. ACS
- OSP only:

Two red annotations are present: a circle around the "Negotiation Status: In Process - At SPAC" field with an arrow pointing to the text "This is the status of the award"; and a circle around a document icon in the activity log with an arrow pointing to the text "Click to open the award document".

This is the status of the award

Click to open the award document

Coeus Update-Negotiation Module

Coeus - Paffrath,Dennis Joseph

File Edit View Maintain Departmental Admin Central Admin Report Window Help

Correct Negotiation : 11

Proposal No.: 11050989 Negotiation Status: **In Process--At ORD SPA**
Negotiator: Sorensen, Gregory Start Date: 19-Jan-2011
Doc Folder:
Agreement Type: Clinical Trial Agreement (CTA) Anticipated Award Date:
Location: SPAC Location Receipt Date: 19-Jan-2011
PI: Shin, Robert K. Proposal Type: New
Sponsor: 001379 Biogen Idec Inc. Contract Admin: Sorensen, Gregory
Prime Sponsor:
Lead Unit: 10409040 Neurology (Multiple Sclerosis)
Title: Controlled Study to Evaluate the Benefits of Switching Therapy [Glatiramer Acetate or Interferon to Natalizumab in Subjects w/Relapsing Remitting MS]

Activity Type: Fully Executed Award Doc... Activity Date: 01/19/2011 Create Date: 01/19/2011
Followup Date: Last Update: 01/19/2011 Last Update By: Snyder, Amanda C.
Description: OSP only:
Fully executed award document. ACS

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

Proposal Details - 00010023

Proposal Organization Mailing Info Investigator Key Person Special

Proposal No: 00010023 Status: Approval In Progress Proposal Hierarchy: ✘ Narrative: || Budget: ✔

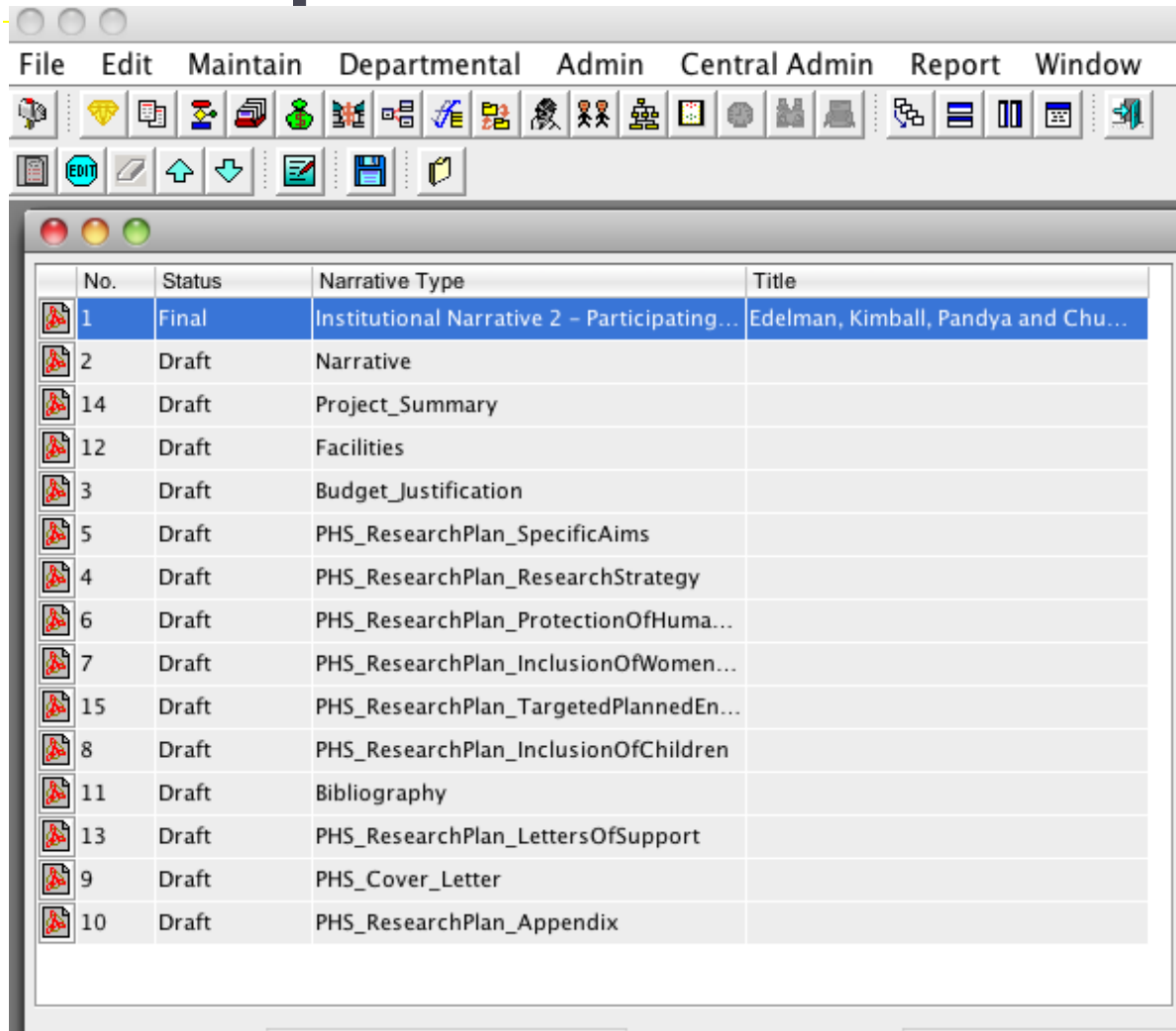
Lead Unit: 12400000:SOP Pharm Hlth Srv Rsch

Title: ESA use, cancer therapy and outcomes: Impact of the 2007 FDA and CMS actions

Start Date: 01-Oct-2011 End Date: 30-Sep-2014

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

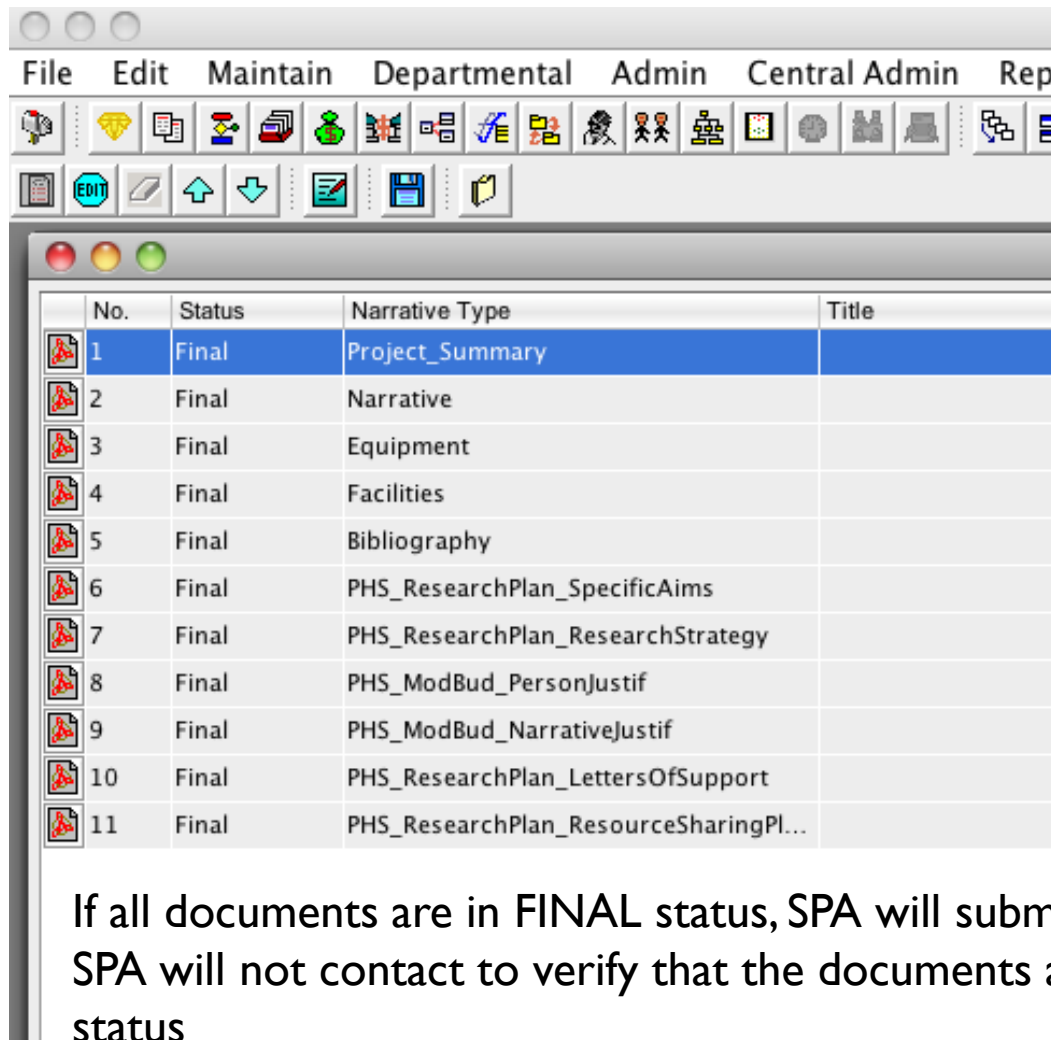
Coeus Update – Final/Draft



The screenshot displays a software application window with a menu bar (File, Edit, Maintain, Departmental, Admin, Central Admin, Report, Window) and a toolbar. Below the toolbar is a table with the following data:

| No. | Status | Narrative Type | Title |
|-----|--------|--|-------------------------------------|
| 1 | Final | Institutional Narrative 2 – Participating... | Edelman, Kimball, Pandya and Chu... |
| 2 | Draft | Narrative | |
| 14 | Draft | Project_Summary | |
| 12 | Draft | Facilities | |
| 3 | Draft | Budget_Justification | |
| 5 | Draft | PHS_ResearchPlan_SpecificAims | |
| 4 | Draft | PHS_ResearchPlan_ResearchStrategy | |
| 6 | Draft | PHS_ResearchPlan_ProtectionOfHuma... | |
| 7 | Draft | PHS_ResearchPlan_InclusionOfWomen... | |
| 15 | Draft | PHS_ResearchPlan_TargetedPlannedEn... | |
| 8 | Draft | PHS_ResearchPlan_InclusionOfChildren | |
| 11 | Draft | Bibliography | |
| 13 | Draft | PHS_ResearchPlan_LettersOfSupport | |
| 9 | Draft | PHS_Cover_Letter | |
| 10 | Draft | PHS_ResearchPlan_Appendix | |

Coeus Update-Final/Draft



The screenshot displays the Coeus software interface. At the top, there is a menu bar with options: File, Edit, Maintain, Departmental, Admin, Central Admin, and Rep. Below the menu bar is a toolbar containing various icons for file operations and navigation. The main window features a table with the following columns: No., Status, Narrative Type, and Title. The table lists 11 documents, all of which are in 'Final' status. The first row is highlighted in blue.

| No. | Status | Narrative Type | Title |
|-----|--------|---------------------------------------|-------|
| 1 | Final | Project_Summary | |
| 2 | Final | Narrative | |
| 3 | Final | Equipment | |
| 4 | Final | Facilities | |
| 5 | Final | Bibliography | |
| 6 | Final | PHS_ResearchPlan_SpecificAims | |
| 7 | Final | PHS_ResearchPlan_ResearchStrategy | |
| 8 | Final | PHS_ModBud_PersonJustif | |
| 9 | Final | PHS_ModBud_NarrativeJustif | |
| 10 | Final | PHS_ResearchPlan_LettersOfSupport | |
| 11 | Final | PHS_ResearchPlan_ResourceSharingPl... | |

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)

Coeus - Paffrat

File Edit View Action Budget Periods Items Maintain Departmental Admin Central Admin Report

Modify Budget for

Summary

Start Date: 01-Jul-2011 End Date: 30-Jun-2012 Cost Limit: \$0.00 No.

Total Cost: \$44,221.65 Direct Cost: \$40,201.50 Indirect Cost: \$4,020.15

Underrecovery: \$16,080.60 Cost Sharing: \$0.00 Direct Cost Limit: \$0.00

| Line | CE | Cost Element Description | Description | Qty | Cost | Sta |
|------|--------|--------------------------|-----------------|------|--------|-----|
| 1 | 000001 | Senior Personnel Salary | Senior Salaries | 0.00 | \$0.00 | 01- |

Personnel Budget Details

Cost Elm.: 000001 Senior Personnel Salary Start Date: 01-Jul-2011 End Date: 30-Jun-2012

Desc.: Senior Salaries

Cost: \$149,925.00 Underrecovery: \$0.00 Cost Share: \$12,575.00 Quantity: 2.00

| Name | Job Code | Start Date | End Date | Period | % Charged | % Effort | Salary |
|----------------|----------|-------------|-------------|--------|-----------|----------|--------------|
| TBA, Physician | 999999 | 07/01/2011 | 30-Jun-2012 | Cycle | 19.97 | 25.00 | \$49,925.00 |
| TBA, Nurse | 999999 | 01-Jul-2011 | 30-Jun-2012 | Cycle | 100.00 | 100.00 | \$100,000.00 |

OK
Cancel
Add
Delete
Details
Calculate
Persons

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”

Modify Budget for Proposal 00010291, Version 1

Budget - Line Item Detail

Category: On Campus Off Campus

Cost Elm: Equipment

Start Date: End Date:

Description:

Cost: Quantity: Apply Inflation:

Cost Sharing: Submit Cost Sharing: Underrecovery:

| Line | CE | Cost Element Description |
|------|--------|--------------------------|
| 1 | 000001 | Senior Personnel Sal |
| 2 | 000025 | Postdoctoral Salary |
| 3 | 000004 | Supplies |
| 4 | 000008 | Travel-Domestic |
| 5 | 000007 | Publications Costs |
| 6 | 000046 | Purchase/care of an |
| 7 | 000020 | Equipment |

Justification

Sponsor requires that the University cost shares at least 50% of the cost of the equipment

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

The screenshot shows the Coeus software interface for 'Modify Budget for Proposal 0001029'. The main window displays budget summary information:

| | | | | | | | |
|----------------|--------------|---------------|--------------|--------------------|-------------|----------------|------|
| Start Date: | 01-Jul-2011 | End Date: | 30-Jun-2012 | Cost Limit: | \$0.00 | No. of Months: | 12.0 |
| Total Cost: | \$263,561.93 | Direct Cost: | \$239,601.75 | Indirect Cost: | \$23,960.18 | | |
| Underrecovery: | \$102,530.60 | Cost Sharing: | \$18,397.23 | Direct Cost Limit: | \$0.00 | | |

The 'Budget - Line Item Detail' dialog box is open, showing details for line item 1 (Senior Personnel Salary). The 'Submit Cost Sharing' checkbox is checked and circled in red.

| Rate Class | Rate Type | Apply | Cost | Cost Sharing |
|-------------------|---------------|-------------------------------------|-------------|--------------|
| MTDC | MTDC | <input checked="" type="checkbox"/> | \$19,940.03 | \$1,672.48 |
| Employee Benefits | Research Rate | <input checked="" type="checkbox"/> | \$49,475.25 | \$4,149.75 |

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

Coeus - Paffrath, Dennis

Budget Periods Items Maintain Departmental Admin Central Admin Report Window

Modify Budget for Proposal

Summary Period

2 Final: Start Date: 01-Jul-2011 End Date: 30-Jun-2013

\$0.00 Total Cost Limit: \$0.00 OH Rate Type: MTDC

\$263,561.93 Total Direct Cost Limit: \$0.00 Direct Cost: \$239,601.75

\$23,960.18 Underrecovery: \$102,530.60 Cost Sharing: \$18,397.23

Budget Status: Incomplete

UR Rate Type: MTDC

On/Off Campus: On

Modular Budget:

Submit Cost Sharing:

Proposal Hierarchy: ~~X~~

| End Date | No. of Months | Total Cost | Direct Cost | Indirect Cost | Cost Sharing | Underrecovery |
|-------------|---------------|--------------|--------------|---------------|--------------|---------------|
| 30-Jun-2012 | 12.0 | \$263,561.93 | \$239,601.75 | \$23,960.18 | \$18,397.23 | \$102,530.60 |
| 30-Jun-2013 | 12.0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

On the Budget Summary Page, **unlick** 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, KMI), *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!