

# 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
- ▶ Subcontract Updates
- ▶ 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
<p>Assignments:</p> <p>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</p>	

# 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, Ophthalmology, Otorhinolaryngology, Path/DMR, Pharmacology, Pulmonary Med, Endocrinology/Diabetes, Pediatrics, School of Pharmacy

# SPA Introductions

---

- ▶ SPA Subcontract Team
  - ▶ Pegah Parsi
  - ▶ Richard Ingraio
  - ▶ Beverly Law
  
- ▶ SP, Advancement Team
  - ▶ Jeanne Galvin Clarke
  - ▶ TBN(s)-Administrator and Analyst
  
- ▶ Assistant 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.***

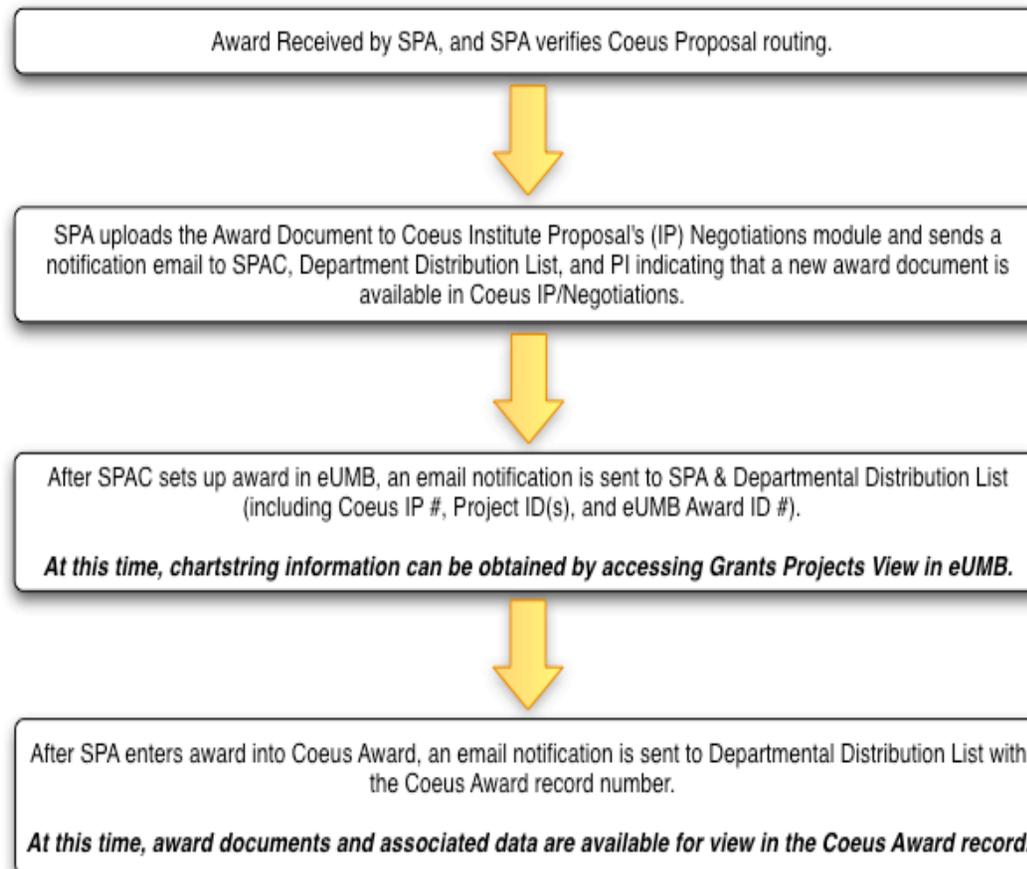


After SPA enters award into Coeus Award, an email notification is sent to Departmental Distribution List with the Coeus Award record number.

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

# Non-NIH New Award Example

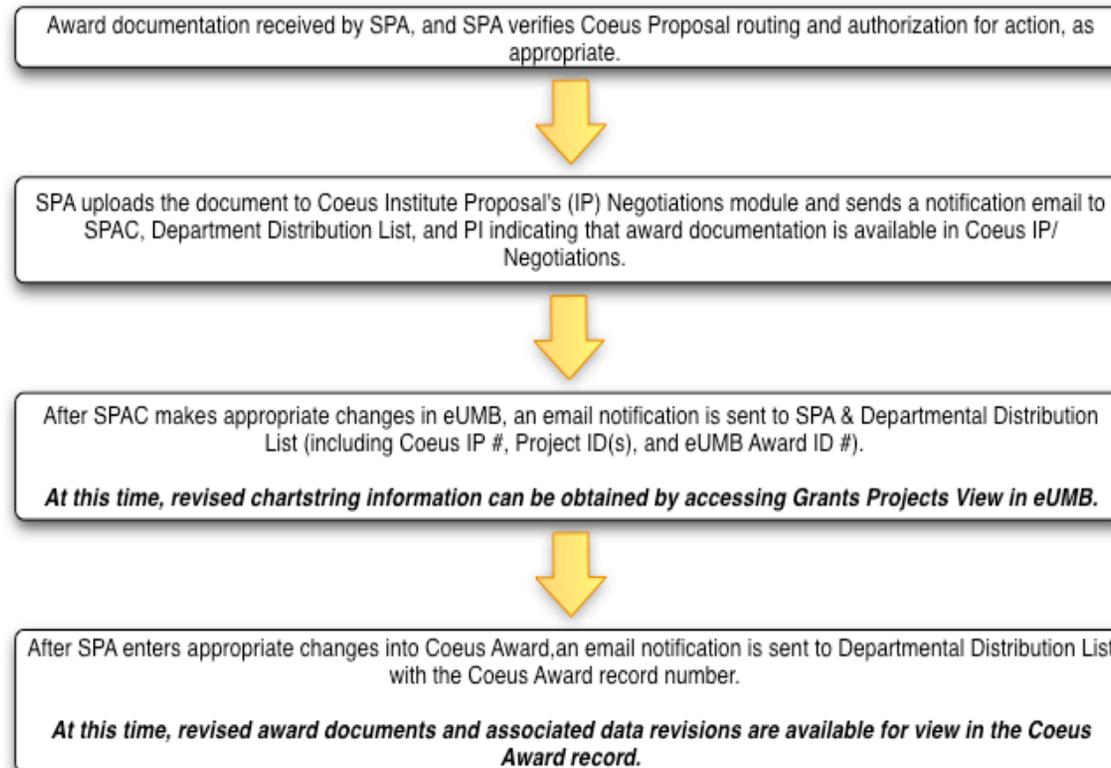
## Workflow for New non-NIH Awards



# Other Award Actions

---

## Workflow for Modifications



*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](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			
<del>Requisitioner</del>			
Dept Requisition Approver			
Receiver			
Pro Card Viewer			
Pro Card Reallocator			
Dept JE Initiator			
<b>Dept Grant Viewer</b>	<b>X</b>		
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](#)

## Search Dropdown:

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

# Grant Project View

**Grant Project View**

**Business Unit:** 00192  RF ImageNow

**PROJECT INFORMATION**

<b>Project:</b>	FY11 MedStar Health	<b>Primary?</b>	N
<b>Project Status:</b>	Open	<b>Eff. Status:</b>	Active
<b>Start Date:</b>	07/01/2010	<b>End Date:</b>	06/30/2011
<b>Budget Start:</b>	07/01/2010	<b>Budget End:</b>	06/30/2011
<b>Funded Amount:</b>			
<b>PI:</b>	005445	Rodriguez De Bittner, Magaly	
<b>Dept:</b>	12302500	PPS General	
<b>Location:</b>	OFF		
<b>Sponsor Ref#:</b>		<b>CFDA#:</b>	
<b>FA Rate Type:</b>		<b>FA Rate Eff. Date:</b>	
<b>FA Base:</b>		<b>FA Rate %:</b>	
<b>Sr. Accountant:</b>	Speaks, Likivu K.	<b>Project Setup:</b>	

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

[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

---

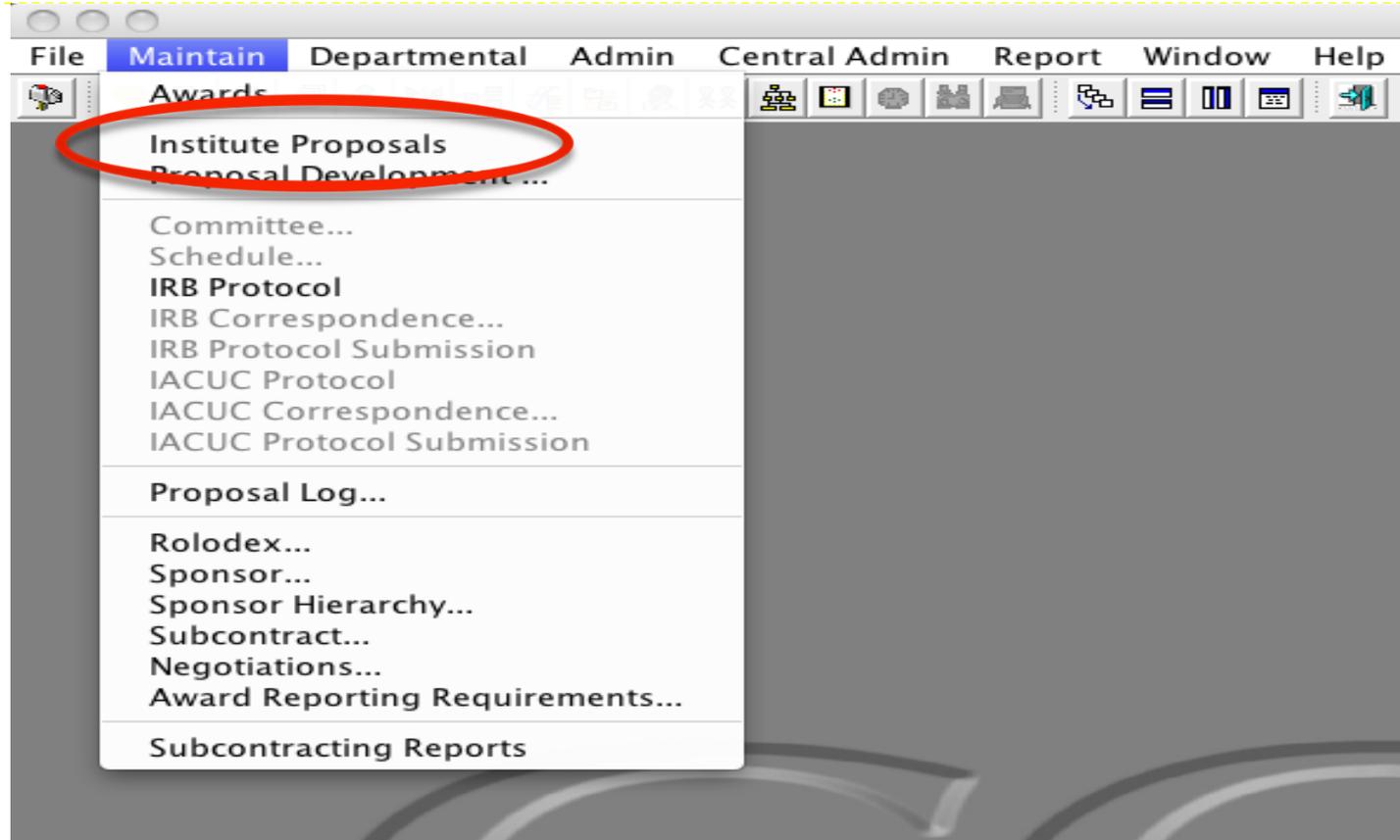
**COMBO EDIT CHARTFIELDS**

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

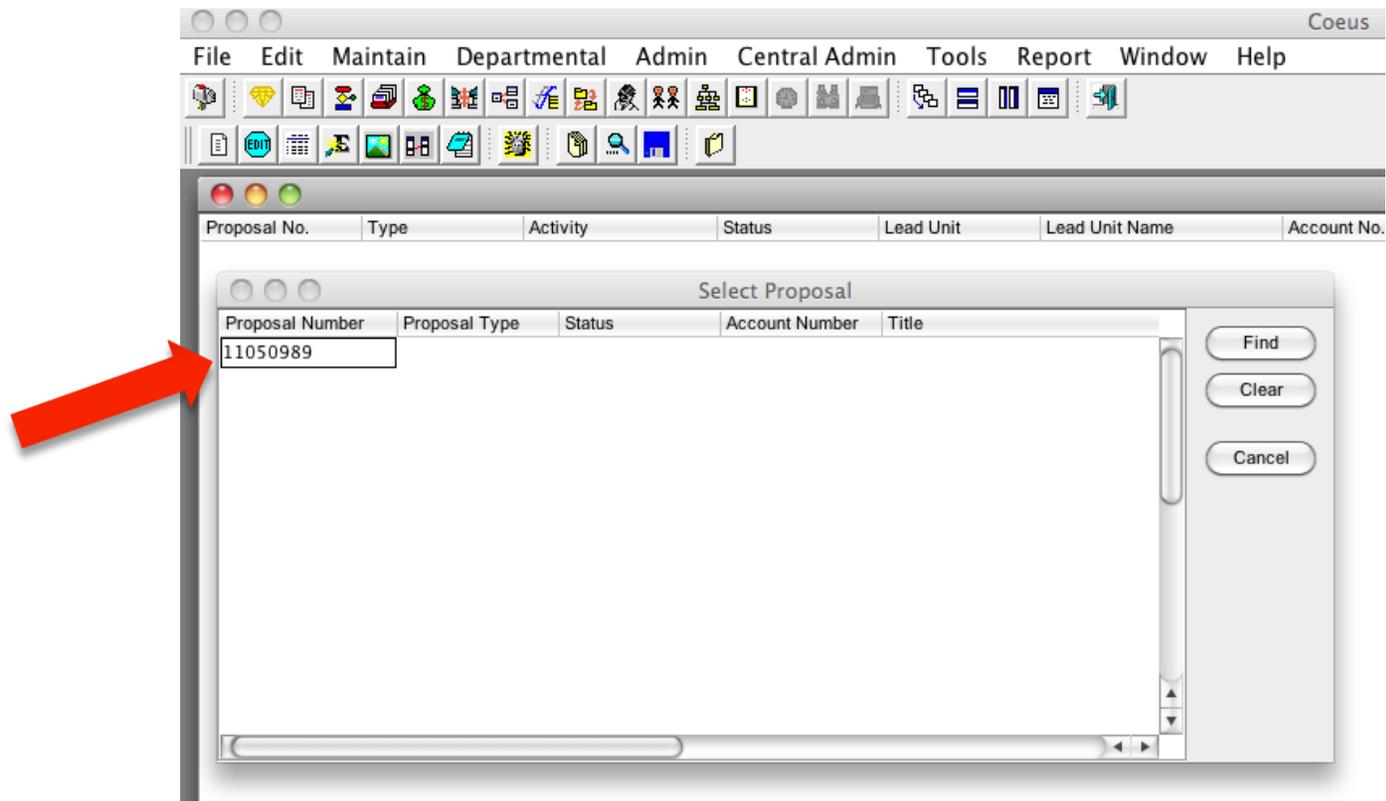
Key Fields: Award Type and Billing Cycle

# 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

---

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

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: Anticipated Award Type: Contract Notice Of Opportunity:

Sponsor: 001379 Biogen Idec Inc. Prime Sponsor:

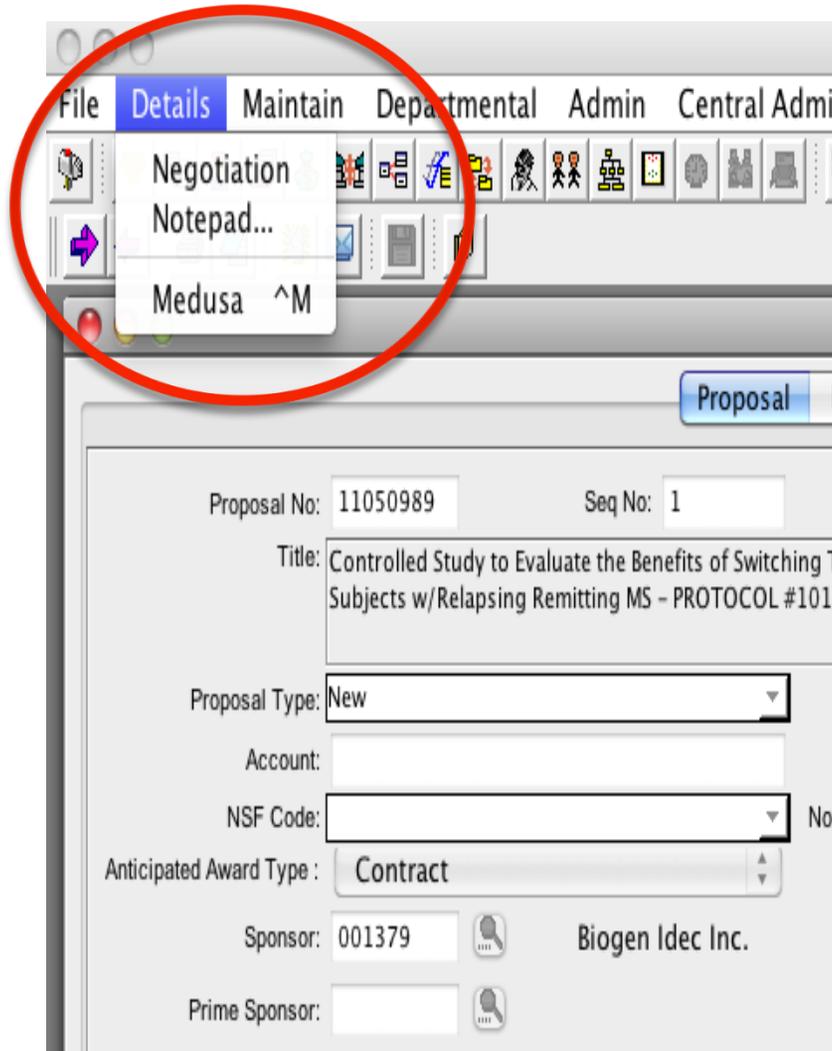
	Initial Period	Total Period	Grad Students
Request Start Date:	01-Dec-2010	01-Dec-2010	Headcount: 0 Person Months: .00
Request End Date:	30-Nov-2011	30-Nov-2013	Account Type: <input type="radio"/> Research <input type="radio"/> Fund
Total Direct Cost:	\$95,017.00	\$252,807.00	Subcontract <input type="checkbox"/>
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:

- 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: 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 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  
Negotiator: Sorensen, Gregory  
Doc Folder:   
Agreement Type: Clinical Trial Agreement (CTA)  
Anticipated Award Date:   
Location: SPAC  
Location Receipt Date: 19-Jan-2011  
PI: Shin, Robert K.  
Sponsor: 001379 Biogen Idec Inc.  
Proposal Type: New  
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: Fully executed award document. ACS  
OSP only:

# 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, 4<sup>th</sup> 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: ✔

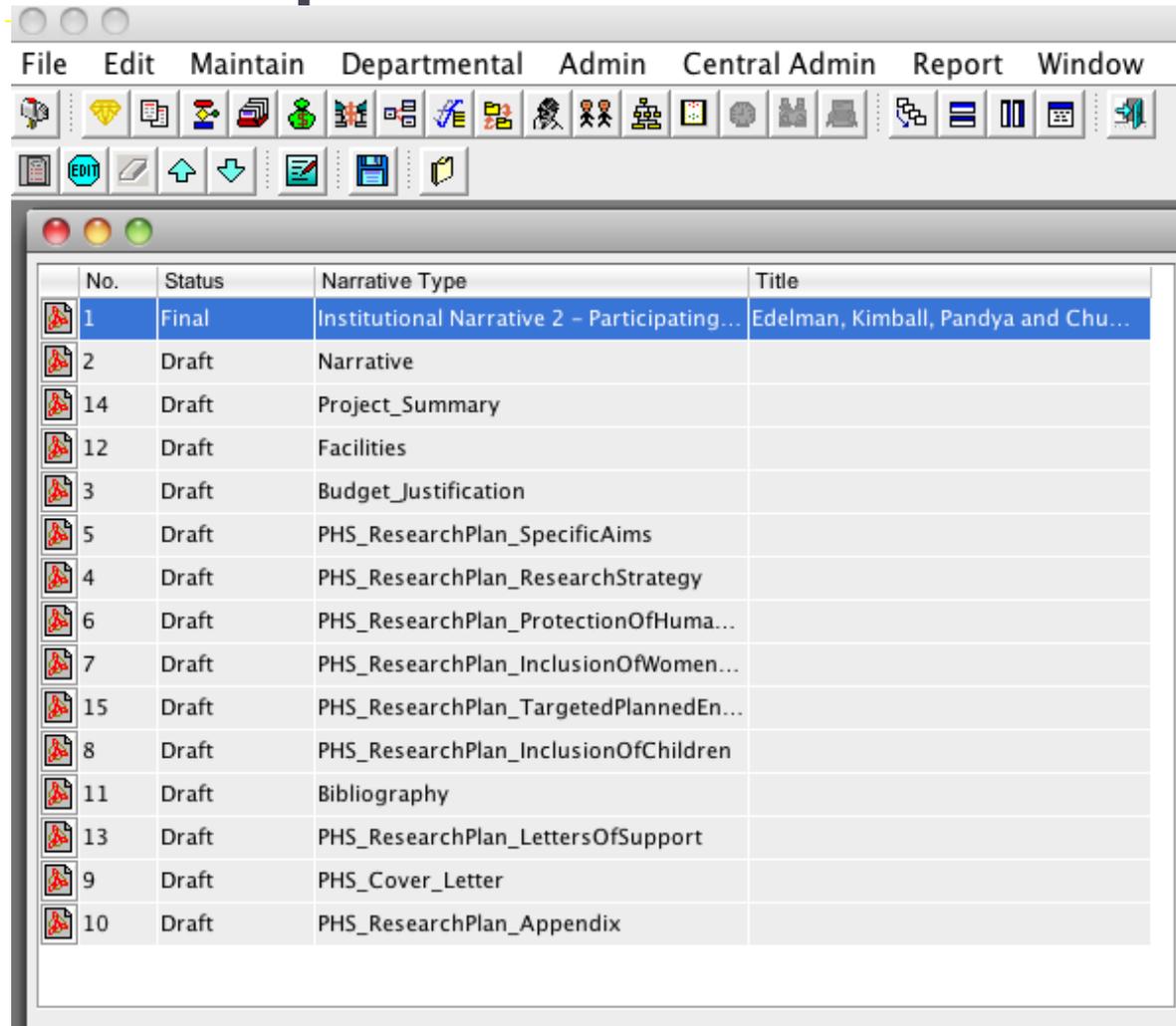
Lead Unit: 12400000:SOP Pharm Hlth Srv Rsch

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

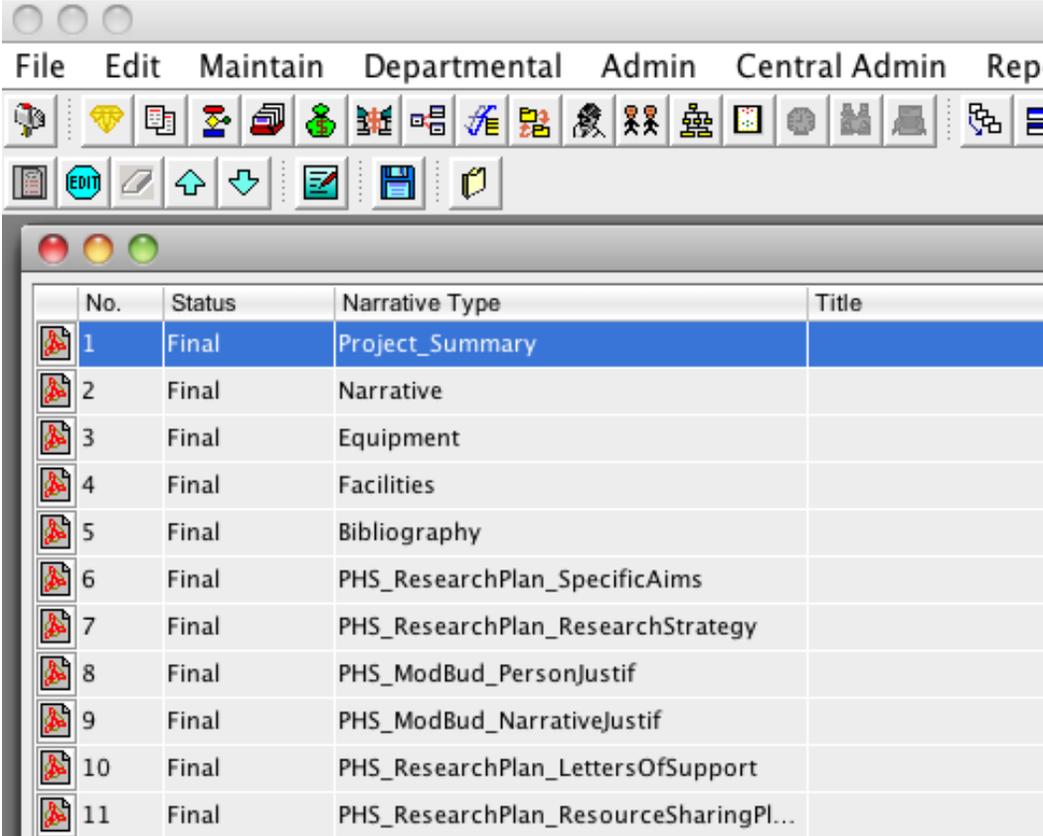
# Coeus Update – Final/Draft



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 shows the Coeus software interface with a menu bar (File, Edit, Maintain, Departmental, Admin, Central Admin, Rep) and a toolbar. Below the toolbar is a table with the following data:

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)

The screenshot shows the 'Modify Budget for' window in Coeus. The 'Summary' tab is active, displaying budget parameters for the period 01-Jul-2011 to 30-Jun-2012. The total cost is \$44,221.65, with a direct cost of \$40,201.50 and an indirect cost of \$4,020.15. Below this, a table lists budget lines, with line 1 (Senior Personnel Salary) highlighted in yellow. The 'Personnel Budget Details' window is open, showing a table with columns: Name, Job Code, Start Date, End Date, Period, % Charged, % Effort, and Salary. The first row, for 'TBA, Physician', is highlighted in yellow and circled in red, showing a % Charged of 19.97 and a % Effort of 25.00. The second row, for 'TBA, Nurse', shows a % Charged of 100.00 and a % Effort of 100.00.

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

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

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 for 'Period 1'.

Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date
1	000001	Senior Personnel Salary	Senior Salaries	2.00	\$149,925.00	01-Jul-2011	30-Jun-2012
2	000025						30-Jun-2012
3	000004						30-Jun-2012
4	000008						30-Jun-2012
5	000007						30-Jun-2012
6	000046						30-Jun-2012

The 'Budget - Line Item Detail' dialog box for line item 1 shows the following details:

- Category: Senior Personnel
- Cost Elm: 000001 Senior Personnel Salary
- Start Date: 01-Jul-2011
- End Date: 30-Jun-2012
- Description: Senior Salaries
- Cost: \$149,925.00
- Quantity: 2.00
- Cost Sharing: \$12,575.00
- Underrecovery: \$86,450.00
- Submit Cost Sharing:

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](mailto: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](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 28<sup>th</sup>, July 28<sup>th</sup> & October 27<sup>th</sup>
  - ▶ Meetings held from 3-4:30pm in HSF II Auditorium
- ▶ Thank you for joining us today!