PURPOSE

To provide instructions on how to fill out the Child Request Form.

APPLICABILITY

This applies to Departmental Administrators, Parent Project PI, Child Project PI, Child Project Chairman, SPAC and SPA.

INSTRUCTION

Link to form

**DocuSign**

- **Filling out the form**

**PowerForm Signer Information**

*Form: UMB - SPAC Child Project Request*

Fill in the name and email for each individual area listed below. All individuals entered will receive an email letting them know when they are required to complete, review and/or sign the document. When you have completed the form, click the **FINISH** button to route the form to the next area.

Please enter your name and email to begin the signing process.

**Departmental Administrator Name & eMail**

- **Your Name:**
  - Full Name

- **Your Email:**
  - Email Address

Please provide information for any other signers needed for this document.

**Parent Project PI Name & eMail**

- **Name:**
  - Full Name

- **Email:**
  - Email Address

Instruction on Filling Form

**Departmental Administrator**

(Or person filling out the form)

Full name & email address

*You will receive and email to fill in all of the required fields on the form*

Fill in Parent Project

PI full name & email address

**Required approver**
Those listed by name above will receive an email similar to the one below in the order of the required actions:

1st - Departmental Administrator or designee to complete the form

2cd - Parent Project PI for signature approval

3rd – Child Project PI for signature approval

4th - Child Project Chair PI signature approval
Departmental Administrator

SPAC Team
noreply@umaryland.edu

Dear Laura O Scarantino,

You are receiving this email because you created a DocuSign form that needs to be completed before it can be submitted to the Parent Project PI for approval. Please complete the form by clicking on the View Document link above.

Thanks
SPAC Department

When you click into on your email

And then choose on the header

Use the Finish Later option to continue signing this document at a later time. Learn more...
This will take you into the form. You will be required to fill the red highlighted boxes in order for the form to move forward for its first approval. The form will not submit if all fields are not filled in. Once you have completed the 2 pages, hit the **Finish** button.

**NOTE FOR SPAC TEAM CHOICE: IT DEFAULTS TO SETUP**

1. This form will automatically route to the setup team
2. No need to make a choice
## CHILD PROJECT REQUEST FORM

### BUDGET INFORMATION

<table>
<thead>
<tr>
<th>Total Amount of Funds for Child Project</th>
<th>$ [ ]</th>
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</thead>
<tbody>
<tr>
<td>Quantum Project Number to be Decreased:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Object Amount</th>
<th>Object Code/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ [ ]</td>
<td>From -- select --</td>
</tr>
<tr>
<td></td>
<td>To -- select --</td>
</tr>
<tr>
<td>$ [ ]</td>
<td>From</td>
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<td>To</td>
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<td>$ [ ]</td>
<td>From</td>
</tr>
<tr>
<td></td>
<td>To</td>
</tr>
</tbody>
</table>

**Total Object Amount Entered**: $ 0.00

**NOTE**: When applicable, include changes that affect the F&A budget category (examples: transfer of funds to purchase equipment or to enter into a sub-recipient agreement).

If more than 6 budget changes required, please upload an excel spreadsheet that include the necessary information that is shown above.

### REMARKS:

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**SPAC Office Use**

**New Award Number:***

**New Project Number:**

**SPAC Approver:**

**Date:**

**SPA Team:**

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Last Updated 11-04-19

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**You can (optional) download or print a copy of the document that you filled out or close****
C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

Department Admin – you are done for now
PARENT PI/CHILD PI OR CHILD PROJECT CHAIR

SPAC Team
noreply@umaryland.edu

Dear Laura O Scarantino,

You are receiving this email because your Department Administrator has requested the transfer of funds to create a new Child Project. Please review the adjustments and approve by clicking on the View Document link above.

Thanks
SPAC Department

When you click into on your email

And then choose on the header
C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

This will take you to the required signatures page. Of course you should review before you sign.

<table>
<thead>
<tr>
<th>REQUIRED SIGNATURES</th>
<th>Sign</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Project PI</td>
<td></td>
<td>7/10/2021</td>
</tr>
</tbody>
</table>

When you hit the button, a box will pop up with My Signatures and Initials. You would either use a saved signature or adopt a new one

My Signatures and Initials
Choose a saved signature and initials or adopt new

*****You can (optional) download or print a copy of the document that you filled out or close*****

Pl or Chair you are done for now!
C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

**SPAC SETUP TEAM**

SPAC setup team will receive an email in their inbox. This email will automatically move to the setup team workflow.

Once you open the docSign document in ImageNow, you can right click the page icon on the thumbnail pane, then choose “Launch associated program” as shown below.

Sign onto your DocuSign Account

And then choose... on the header
C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021

You will then perform the action of creating the child project per the instructions provided on the form. Once completed, scroll to the bottom of the form and fill in the award # and project number and click on the SPAC Approver “sign” line to sign the form.

And then click the button.

Make sure that before you send the DocuSign file to WFE that you fill in the properties for the child setup, if it was not already filled in during the transfer to Account Maintenance workflow.
When SPAC hits the “finish” button, a copy of the document goes to Team-Aqua in SPA and is copied out to everyone who was a signer on the document. Those who signed on the document will receive the following email.

Mon 7/25/2021 4:57 PM

DocuSign NA3 System <dse NA3@docusign.net>

Child Project Request for your Review and Signature for Laura O Scarantino

All parties have completed Child Project Request for your Review and Signature for Laura O Scarantino.

Dear Laura Scarantino,
You are receiving this email because the Departmental Administrator has submitted a Child Request Form and you are a required approver. Please enter the form through the review document button above. If you are in agreement, please sign the form. If you have any questions about this transfer of funds, please contact the Department Administrator listed on the form.

Thanks
SPAC Department

END OF INSTRUCTIONS

Once the form is filled out and submitted, the requestor will receive an email prompting them to review. Once reviewed and closed, the form will continue along the routing process so that all parties can view the status.

To track the status, you must have:

1) A DocuSign account.
2) Must use a umaryland.edu email address.