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

<table>
<thead>
<tr>
<th>SPA</th>
<th>SPAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greg Sorensen, Manager</td>
<td>Tegan Baumann, Senior Accountant</td>
</tr>
<tr>
<td>-Towanda Gilliam</td>
<td>-Frankie Thomas</td>
</tr>
<tr>
<td>-TBN, SP Administrator</td>
<td>-Amy LaFevers</td>
</tr>
</tbody>
</table>

**Assignments:**
Comparative Medicine, Complementary Medicine, Emergency Medicine, IHV, Infectious Disease, Neurology, Physical Therapy, Psychiatry, Surgery, School of Dentistry
# Introductions: Team C

<table>
<thead>
<tr>
<th>SPA</th>
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</thead>
<tbody>
<tr>
<td>Manager- TBN</td>
<td>Steve Bonaccorsi, Senior Accountant</td>
</tr>
<tr>
<td>-Debbie Griffith</td>
<td>-Letisha Butler</td>
</tr>
<tr>
<td>-Venzula Harris</td>
<td>-Dan Grote</td>
</tr>
<tr>
<td>-Cynthia McKoy</td>
<td>-Tammy Bloss</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>SPA</th>
<th>SPAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leerin Shields, Manager</td>
<td>Steven Wood, Senior Accountant</td>
</tr>
<tr>
<td>- Marcos Garza</td>
<td>- Rosetta Elicerio</td>
</tr>
<tr>
<td>- Dinnise Felder</td>
<td>- Shernett Wynter</td>
</tr>
</tbody>
</table>

**Assignments:**
- Cardiology
- Diag Radiology
- Epi & Public Health
- Family Medicine
- Gastroenterology
- General Internal Medicine
- IGS
- Nephrology
- Neurosurgery
- Orthopedics
- Rheumatology
- School of Law
## Introductions: Team E

<table>
<thead>
<tr>
<th>SPA</th>
<th>SPAC</th>
</tr>
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<tbody>
<tr>
<td>Danielle Brown, Manager</td>
<td>Likivu Speaks, Senior Accountant</td>
</tr>
<tr>
<td>-Kachana Tirasuth</td>
<td>-Brenda Hester</td>
</tr>
<tr>
<td>-Carol Foreman</td>
<td>-Lina Stanis</td>
</tr>
<tr>
<td></td>
<td>-TBN</td>
</tr>
</tbody>
</table>

**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

- 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

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

2. 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.

3. 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.*

4. 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](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/.

- The role name is Dept Grant Viewer
**Grant Project View**

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

*Errors cannot be corrected; a new project must be established.*
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:** 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#:**

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**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

**COMBO EDIT CHARTFIELDS**

<table>
<thead>
<tr>
<th>Rule</th>
<th>Owner Dept</th>
<th>Fund</th>
<th>Program</th>
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<tr>
<td>1</td>
<td>2010RF</td>
<td>12302500</td>
<td>183</td>
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</table>

Key Fields: Award Type and Billing Cycle
Coeus Updates-Institute Proposal Module

After signing onto Coeus, Go to Maintain > Institute Proposal
Type in the Institute Proposal Number that was provided to you via email from SPAC.
Double Click on the highlighted selection, this will take you into the Coeus record.
Coeus Update-Institute Proposal Module

![Coeus Update-Institute Proposal Module Image]
Coeus Update-Negotiation Module

From the Institute Proposal record

Go to:

Details >

> Negotiation
Coeus Update-Negotiation Module

This is the status of the award

Click to open the award document
Coeus Update-Negotiation Module
Coeus Update-Award Doc

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

This Agreement is made between BIOPEN IDEC INC., a Delaware corporation, having a place of business at 133 Boston Post Road, Weston, MA 02493, together with its Affiliates ("Biopen 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, Biopen Idec is sponsoring a clinical study entitled: "A Multicenter, Randomized,
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.
<table>
<thead>
<tr>
<th>No.</th>
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<tr>
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<td>Final</td>
<td>Institutional Narrative 2 – Participating Investig...</td>
<td>Edelman, Kimball, Pandya and Chu...</td>
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<tr>
<td>2</td>
<td>Draft</td>
<td>Narrative</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Draft</td>
<td>Project Summary</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Draft</td>
<td>Facilities</td>
<td></td>
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<tr>
<td>3</td>
<td>Draft</td>
<td>Budget Justification</td>
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<tr>
<td>5</td>
<td>Draft</td>
<td>PHS_ResearchPlan_SpecificAims</td>
<td></td>
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<tr>
<td>4</td>
<td>Draft</td>
<td>PHS_ResearchPlan_ResearchStrategy</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Draft</td>
<td>PHS_ResearchPlan_ProtectionOfHuman Subjects</td>
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<tr>
<td>7</td>
<td>Draft</td>
<td>PHS_ResearchPlan_InclusionOfWomen</td>
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<tr>
<td>15</td>
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<td>PHS_ResearchPlan_TargetedPlannedEn...</td>
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<td>8</td>
<td>Draft</td>
<td>PHS_ResearchPlan_InclusionOfChildren</td>
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<td>13</td>
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<td>PHS_ResearchPlan_LettersOfSupport</td>
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<td>9</td>
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<td>PHS_Cover_Letter</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Draft</td>
<td>PHS_ResearchPlan_Appendix</td>
<td></td>
</tr>
</tbody>
</table>
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.
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......
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.
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 detailed information?

- [http://era.nih.gov/training_career/index.cfm](http://era.nih.gov/training_career/index.cfm)
### Invoicing Reminders

<table>
<thead>
<tr>
<th>Standards (no backup)</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Will only bill expenses posted in the system, no adjustments made to interim bills</td>
<td>☐ Complete the Deliverable Invoice Receivable Request Form:</td>
</tr>
<tr>
<td>☐ Standards (with backup)</td>
<td>☐ Future collection efforts are based on the invoice date</td>
</tr>
<tr>
<td>☐ Backup must reconcile to the expense posted in Raven</td>
<td>☐ Include a copy of the invoice</td>
</tr>
<tr>
<td>☐ Invoice and backup should be sent together from SPAC</td>
<td></td>
</tr>
</tbody>
</table>
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!