SPA/SPAC Updates Quarter 1, 2020

September 26, 2019

2:30 – 4:00 pm

SPA Agenda

- Carry forward Form
- Kuali Research - Routing/process
- DOD again
- Training
- Reminders

New Team Members

- Please join with us in welcoming Odessa to the Team White Proposal Team

Carryforward Form

- New form
- Submit to SPA FIRST!!!!
  - SPA must review each award
  - SPA teams will assist with obtaining prior approval if necessary
  - Remember to include Supporting Documentation/Prior Approval with the form
- SPA will forward the carryforward to SPAC for processing

Kuali Research

- Routing of Proposals in Kuali Research
  - In consultation with the SOM Dean's office (only school really affected by this change), we will be changing how routing occurs.
  - Combining with College Park resulted in all key persons named in the proposal to be included in the routing, which caused delay and confusion.
  - Sometime after October 5, 2019, new routing agendas will be put into place.
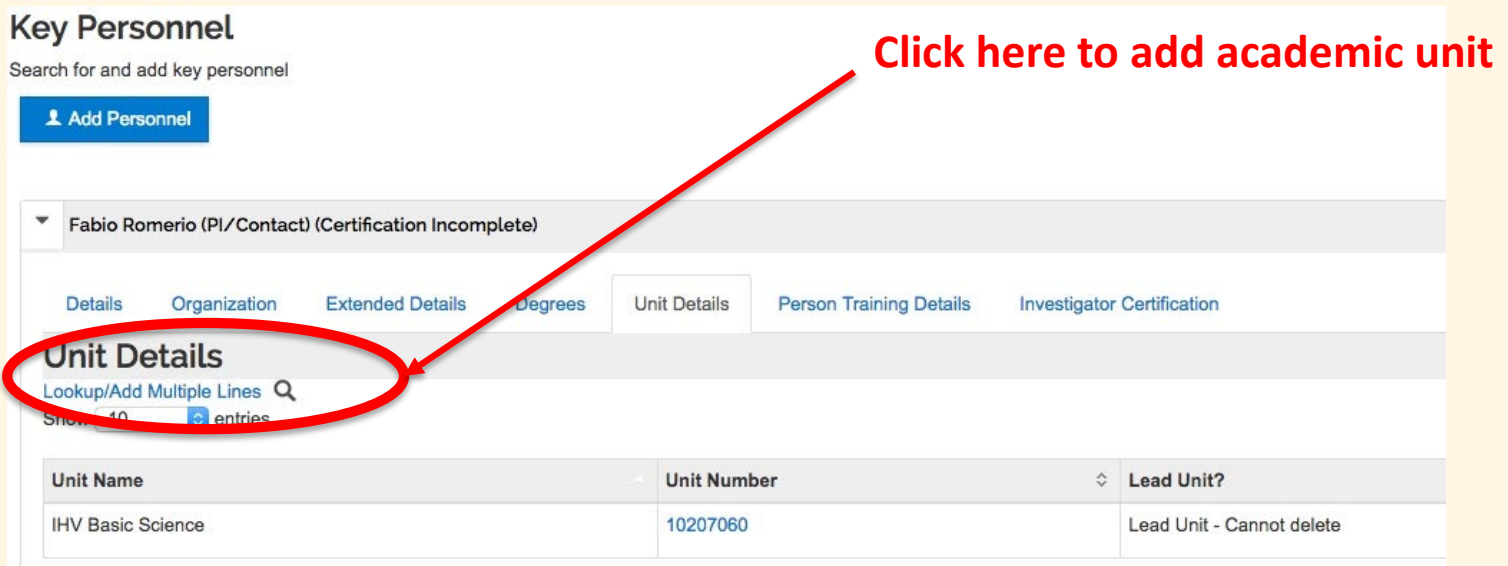
Routing Process

New Routing Process

- There will be no change if a department/division creates a proposal for their faculty.

- If a center/institute creates a proposal, it will automatically pull in the center/institute as the lead unit into the Person details within the Key Persons tab. (This controls the routing of the proposal)

New Routing Process

– Under Key Person tab – Under Personnel you will add your Principal Investigator and any other key person.

– Open Details – under Unit Details, add the academic unit

New Routing Process

- Add Academic Unit number (you must have this in the proposal, or it will be rejected back to you for correction)

Old vs New Routing

These will be listed as FYI instead of Pending Approval

Future Action Requests ▾ hide

	Action	Requested Of	Time/Date	Annotation
▸ show	PENDING APPROVE	UMB SOM IHV Stop 1	10:27 AM 09/26/2019	PeopleFlow Name: UMB SOM IHV
▸ show	PENDING APPROVE	UMB SOM Medicine (Infectious Disease) Approvers	10:27 AM 09/26/2019	PeopleFlow Name: UMB SOM Medicine Infectious Disease
▸ show	PENDING APPROVE	UMB SON Pain and Trans Sympton Sci	10:27 AM 09/26/2019	PeopleFlow Name: UMB SON Pain and Trans Sympton Sci
▸ show	PENDING APPROVE	UMB SON Dean Office	10:27 AM 09/26/2019	PeopleFlow Name: UMB SON Deans Office
▸ show	PENDING APPROVE	UMB SOM Deans Office Approvers	10:27 AM 09/26/2019	PeopleFlow Name: UMB SOM Deans Office PeopleFlow
▸ show	PENDING APPROVE	UMB SPA Team Red	10:27 AM 09/26/2019	PeopleFlow Name: UMB SPA Team Red

Kuali Research & Proposals

- Oct 5th and 16th deadlines
  - Remember get your proposals in early! Specially since we are heading into the Holiday Season soon
  - Remember to follow SOM, SOD and SOP routing deadlines

  - **Proposal triaging occurs 24 hrs. *AFTER* proposal creation!**

DOD Proposals/Pre-Proposals

- You must select the Sr. Administrator as the Business Official during the Pre-Proposal phase
  - Team Red: Marie Coolahan
  - Team White: Christine To'alepai
- The order for the attachments in the attachment section is very important in DOD submissions

SAVE THE DATE!!!

NCURA Region II PDC – Internal Control

November 7, 2019 – 9:00 AM to 4:00 PM

Location – UMB Biopark

Kuali Research Reminders…

- Info & Guides on SPA website
  http://www.umaryland.edu/kualicoeus/user-resources-and-help/

  Navigating and searching in KR

  PI certification and approval

- KR New User Training Dates (CITS enrollment database)

  10/2/2019 10:00AM-12:30PM

- New email for KR "Report a Problem"
  DLKualiResearchHelp@umaryland.edu

KR Proposal Reminders

- Subrecipient Commitment Form is *still* a requirement at the time of proposal

- PI's must certify the proposal – This hold true for copied proposals as well

- Do not use old proposals!

- Proposals with human subjects
  - Instructions for NIH proposals with human subjects http://www.umaryland.edu/kualicoeus/user-resources-and-help/nih-human-subjects-forms/

Reminders

- Please use the team emails when communicating with SPA, this allows us to triage the action. Then you will receive an email from the SPA person who is working on that action. This is true unless you are already working with a SPA individual then communicate directly with them.

- Remember SPA response time to e-mails generally takes 24 hours unless an email is marked as URGENT!!

- Ask your general questions at Research Matters
  http://researchmatters.umaryland.edu

- If you change the deadline date, please update your team or the person working on your proposal *immediately!*

- Please give SPA adequate time to review your proposal.

Cost Agenda

- SPAC-Costing and Compliance
  - Extension of Budget Retro (BR) Cut Off
  - Direct Retro (DR) Form Changes
  - New SOAPF Accounts and Post Docs on Training Grants
  - Service Center Rate Proposals
  - 093019 Initiation

Extension of BR Cutoff date – Overriding 90day BR rule

With Quantum going live on 10/02/19

- BR cutoff date PP20-07 (Check date 10/04/19) has been extended
  - Initially Tuesday 10/01/19 was the last day to process EFPs for 07/01/19
- Extended to PP20-10 (Check Date 11/15/19)
  - Tuesday 11/12/19: last day to process EFPS for 07/01/19
  - Must be approved by 8pm on 11/12/19
  - Wednesday 11/13/19 start processing EFPs with begin date 08/18/19

DR Form Update

- Form will be updated for new Quantum Chart string

- Available on SPAC-Cost web page prior to Quantum Go-Live on 10/02/19

  - https://www.umaryland.edu/cost/direct-retro-forms/

- Development for New Online Form completed after Go-Live

New Quantum SOAPF Accounts

- To adjust fringe benefits and fund health benefits for post docs on training grants
  - If the Project/Purpose used to charge these expenses have changed, please send notification with old and new chart string to effort@umaryland.edu
- Adjustments for September 2019 will not show up on e-UMB Financials
  - They will be posted to Quantum Financials in the calendar month October 2019
  - Cumulative balance will be accurate

Service Center Proposals

- Rate letters will be sent out by next Monday, 10/01/2019

- Completed Proposals need to be returned to Ron Powell and Tom McHugh by 11/01/2019
  - Please Attach Narration sheet with rate proposal

Effort Reminders

- June Effort forms were due 09/10/19
  - Total delinquent forms in ERS: 452
- The new 093019 period is being initiated
  - Will be available next Monday 09/30/19
- Check PCA Balances!
  - No Fixed EFPS at year end to allocate retropays processed in FY20, but related to FY19
  - These FY19 retro pays are falling to the PCA and need DRs to move to correct projects

SPAC AGENDA

- Staffing Upates
- Preparing for Quantum
- Preparing for Go Live
- Development
- Reminders!

SPAC Staffing Updates

OPEN POSITIONS

- NOT A ONE!

Welcome Intern
Nicolette McGhee

Preparing for Quantum

- Everything prior to 7/1/2014 is closed or being closed (few stragglers)
- 25,124 projects 21,095 closed
- 1,501 expired (GT 7/1/14) and 2,528 open
- We are only able to use Raven until after Oct 1
- Still have FFR's out there with only 2 BD'S

Preparing for After Go-Live

- First 2 weeks will be spent setting up awards
- The entire team will be setting up and modifying awards
- Then we move onto billing
- Have notified sponsors that we may be late
- DIRRF's are input directly by departments

Development

- NIH – Federal Salary Cap Policy update
- SCCU policy update
- Training Grants Training
- Relinquishment Guidance
- Closure Process update

Reminders

- SCR Reporting
  - Due by October 11th
  - For Federal Service Contracts Only
  - Esther Ndiangui from our office will notify you with your list
  - Remember, if you have a service contract, you need to have your subs track their hours for invoices posted in our system 10/1/18-9/15/19

QUANTUM Updates

- Quantum Financials – Lynn McGinley
- Revenue Recognition
- Cost Sharing
- Data Analytics Demo