



UNIVERSITY *of* MARYLAND

# **SPA Updates**

## **3<sup>rd</sup> Quarter 2014**

September 23, 2014

2:30 – 3:00 pm

SOP N203

# Today's Agenda

- SPA Personnel Changes
- Limited Submissions Process
- TEDCO MII
- NIH Reminders and Announcements
- Kualu Coeus Updates

# SPA Personnel Changes

- Leerin Shields and Joan Kanner have left SPA/UMB
- Amanda Snyder is currently assisting Team Yellow with management functions
- Teams Yellow 1 and Yellow 2 have been merged into one team
  - New Team email effective immediately is [Team-Yellow@ordmail.umaryland.edu](mailto:Team-Yellow@ordmail.umaryland.edu)
  - No need to resend emails sent to Team Y1 and Y2 emails

# Limited Submission Process

- Upon receipt of a proposal solicitation that limits the number of proposals allowed, submit to SPA. (Jeanne Galvin-Clarke)
- An announcement will be sent to RAC and to the Assoc/Assist Deans for Research (ADR) for each school, indicating the date a one-page summary is due to SPA.
- The one-page summaries will be reviewed by ORD VPR and the ADRs. This group will make the actual selection.
- Jeanne Galvin-Clarke will inform the candidate(s) who are selected and their chair.



UNIVERSITY of MARYLAND

# Maryland Innovation Initiative (MII):

Foster the transition of promising technologies having significant commercial potential from Qualifying Universities to the commercial sector.



- Only Qualifying Universities (UMB, UMCP, JHU, UMBC, Morgan State)
  - Technology must be owned by QU and disclosed to QU's TTO.
  - Technology must have appropriate IP protection.
  - UMB Winners Since Program Inception:
    - **Phase I (UMB PI) – 24; 18 sole + 6 joint**
    - **Phase II (Business Planning) - 1**
    - **Phase III (UMB Company) – 3**

# TEDCO's

## Maryland Innovation Initiative (MII)

The Office of Technology Transfer in ORD is the organizing office at UMB for MII

- OTT works closely with PIs on these proposals
- OTT provides a support letter

<http://www.ord.umaryland.edu/ott/index.html>

# TEDCO's MII

- These proposals are routed in Quali Coeus and awards are given a Project ID from eUM, just like any other sponsored project
- Short period of performance – 9 months
  - OTT has been getting feedback from PIs that they aren't getting access to funds quickly
  - Recommend setting up Temp Accounts to help PI meet quick turn around

# NIH Updates

- Ruth L. Kirschstein NRSA Individual Predoctoral Fellowship to Promote Diversity in Health-Related Research” applications (PA-14-148) now require the attachment, “Additional Educational Information” as part of the application. This information is attached under the Other Attachments section of the application. See NOT-OD-14-095 for more info.
- Starting 10/17/2014 the Research Performance Progress Report (RPPR) will be expanded to include **ALL** Type 5 Non-SNAP Progress Reports. See NOT-OD-14-092 for additional information.



# NIH Updates

- eRA Commons username is required for primary Sponsor in Individual Fellowship (F-series) grant applications as of 8/29/14. Additionally, Sponsors need to have the “Sponsor” role in the eRA Commons. NOT-OD-14-129
- Starting 10/1/14 Commons Usernames for graduate and undergraduate student project roles will be **required** for both the PHS 2590 non-competing continuation forms and the RPPR. Missing data has generated a warning for RPPRs since last October 2013. It will now be an error that will prevent submission. NOT-OD-13-097
- Colin Hunter is the contact person to set up and modify NIH Commons usernames: [chunter@umaryland.edu](mailto:chunter@umaryland.edu)

# Inclusion Management System (IMS) in the NIH eRA Commons

- New feature in the Commons
- Replaces current Population Tracking System to ensure appropriate inclusion of women & minority groups in clinical research
- The new (Sept 2013) “structured data forms” that replaced the fillable PDF in the application facilitate this new format
- As of 10/17/2014
  - inclusion data will be accessible in eRA Commons using IMS
  - submission of all RPPRs will need to use the link to the new IMS system (located in Section G.4.b of the RPPR) to report inclusion data, even if the report was due prior to 10/17
- Keep an eye out for additional Guide Notices, messages, user documentation and possibly a video tutorial by NIH to assist in the transition to IMS

# NIH Policy Page Timeline

The NIH Policy Page now contains a useful, interactive timeline that shows when new policies take effect.

<http://grants.nih.gov/grants/policy/policy.htm>

The screenshot displays the NIH Grants & Funding website. The main navigation bar includes links for HOME, ABOUT GRANTS, FUNDING, DEADLINES, GRANTS POLICY (highlighted), GRANTS, NEWS & EVENTS, and ABOUT OUR. The page title is "Grants & Funding".

**Grants Policy & Guidance**

**On This Page:**

- Grants Policy Statements
- General Policy Notices
- Grant Awards & NIH Appropriations
- Policy Resources
- Other Guidance Resources
- Related Links - Sites of Interest

**Upcoming Changes in Grants Administration**

September 1, 2014

## National Biosafety Stewardship Month

During September's National Biosafety Stewardship Month, NIH grantee institutions are encouraged to reexamine current policies, conduct inventories and reinforce biosafety training. ([Rock Talk Blog post](#)) (NOT-OD-14-127)

← AUGUST 29, 2014  
Sponsor Commons ID Required on Fellowship Applications

→ SEPTEMBER 30, 2014  
Updated Grant Closeout Policies

**Timeline of Policy Updates:**

Month	Policy Update
JUNE	Pilot of Modified NIH Biosketch Announced
JULY	Multi-project Applications Require Electronic
AUG.	Activation Notice Only Needed in
SEPT.	Updated App 13 for SBIR/STTR
SEPT.	National Biosafety Stewardship Month
SEPT.	New Inclusion Reporting Requirements for Non-
OCT.	Updated Grant Closeout Policies
OCT.	Individual Development Plans for Grad Students and
NOV.	RPPR Required for All Non-SNAP Progress Reports
NOV.	New Inclusion Management System (IMS) Available
DEC.	

Kuali Coeus is

**LIVE!**

# KC Resources

<http://www.umaryland.edu/kualicoeus>



[myUM](#) | [Directory](#) | [Campus Map](#) | [Site Map](#) | [THE elm](#) | [UM shuttle](#) | [Mobile UMB](#)

FOUNDATIONS OF  
EXCELLENCE

[About UMB](#) | [Schools](#) | [Offices](#) | [Research](#) | [Student Services](#) | [Campus Life](#) | [Support UMB](#)



## Kuali Coeus at UMB

- Kuali Coeus Home
- User Access and Requests
- Training
- User Resources and Help
- User Resources Home
- Attachments
- Budgets
- General/Overall
- KC Tips for Coeus Users
- Transition to Kuali Coeus
- About Kuali Coeus



*Home > [kualicoeus](#) > [Kuali Coeus User Resources](#) > [Budget Development](#)*

### Budget Module Resources

#### Tips

**Budget initiation:** When you create a second "budget version", you MUST give it a new name. **Each budget version MUST have a different name.** Use relatively short names - 30 characters or less is recommended.

**Sync rates** (F&A or fringe benefits): We do not recommend using a budget from an old or copied proposal. Should you choose to do so, you may need to "sync" the rates.

- To use your existing budget, open the budget. Go to the Rates tab. If the rates are not current, click the "sync all rates" button. Answer "yes" to the query. Save. Answer "yes" to the query. Saving results in budget recalculation with the updated rates.
- New budgets should calculate correctly.

#### Instructions

[Apply the salary cap](#) (PDF)

[Create a modular budget with no budget detail \(no subawards\)](#) (PDF)

[Create a modular budget with no budget detail \(with subawards\)](#) (PDF)

[Enter a To-Be-Named person in the budget](#) (PDF)

[Use the Summary Personnel budget tool](#) (PDF)

# KC Access and Requests

## Kuali Coeus at UMB

Kuali Coeus Home

User Access and Requests

Address Book Entry Request

Add User Roles

Change User Roles

Kuali Coeus User Roles

Organization/Subcontractor Request

Sponsor Request

User Access/Requests Home

Training

User Resources and Help

About Kuali Coeus

*Home > [kualicoeus](#) > [User Access and Requests](#)*

### Gaining Access to Kuali Coeus

All Kuali Coeus Users must have a UMB Employee ID or must be [Affiliates entered in the UMB Community System](#) with a request for Kuali Coeus access. Access to Kuali Coeus is via the myUM Portal. After logging on to myUM, you will find a link for Kuali Coeus on the left hand side.

[About Kuali Coeus roles](#)

[User Roles Request](#) - add roles for a new user in Kuali Coeus

[Change a User's role\(s\) or unit\(s\)](#) - request changes to existing Kuali Coeus user roles. Please use this request to add or remove roles or to update unit access. To inactivate a User who is no longer at UMB or who no longer requires Kuali Coeus access, please [email your request to Janet Simons and Song Yu](#).

### Other Kuali Coeus Requests

[New Sponsor Request](#) – Request that a new Sponsor be added in Kuali Coeus

[New Organization Request](#)– Request that a new Subcontractor/Other Organization be added in Kuali Coeus.

**Proposal Approver Updates** – To request an update to a unit's approval map, please [send an email](#) describing the changes.

**Email Distribution List Updates** – To update the email distribution lists used by SPA and SPAC, please [send an email](#) describing the changes.

# KC Requests

- Address Book
  - No UMB Personnel will be added to the Address Book
- New Sponsor Requests
  - For sponsors giving UMB funding
- New Organization Request
  - For outgoing subcontracts from UMB to this organization

# KC – Has the screen fully loaded?

**kuali** COEUS® Researcher Unit Central Admin Maintenance System Admin

action list doc search Logged in User: 23880040 - Snyder, Amanda Log

Proposal Development Document

Doc Nbr:	459410	Status:	Approval Granted	Copied from Document Id:	
Initiator:	25820036	Created:	09:37 AM 09/17/2014		
Sponsor/S2S:	National Institutes of Health/None	PI:	Riazuddin,Saima		

Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions Permissions Proposal Summary Proposal Actions Medusa

Document was successfully approved. expand all collapse all

- Data Validation show
- Proposal Hierarchy show
- Print show
- Copy to New Document show
- Proposal Data Override show
- Budget Data Override show

See how the page just cuts off mid-panel...

Notice that there are no buttons at the bottom of the screen...

This screen has NOT fully loaded.

If you try to move on before it finishes, you can expect to receive an error AND to lock your proposal.



# KC – Has the screen fully loaded?

The screenshot shows the KC system interface for a 'Proposal Development Document'. The top navigation bar includes the 'kuaii' logo, 'COEUS', and user roles: Researcher, Unit, Central Admin, Maintenance, and System Admin. The user is logged in as 'Snyder, Amanda'. The document details table shows: Doc Nbr: 459410, Initiator: 25820036, Sponsor/S2S: National Institutes of Health/None, Status: Approval Granted, Created: 09:37 AM 09/17/2014, and Copied from Document Id: 57560. The navigation menu includes: Proposal, S2S, Key Personnel, Special Review, Custom Data, Abstracts and Attachments, Questions, Budget Versions, Permissions, Proposal Summary, Proposal Actions, and Medusa. A message states 'Document was successfully approved.' Below this is a list of panels with 'show' buttons: Data Validation, Proposal Hierarchy, Print, Copy to New Document, Proposal Data Override, Budget Data Override, and Route Log. At the bottom, there are buttons for 'submit to sponsor', 'send notification', and 'close'.

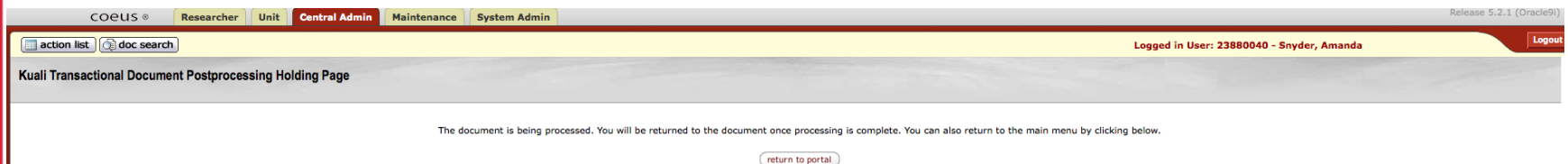
Same screen a few seconds later...

Panels are fully developed.  
Action buttons appear at the bottom.

This screen IS fully loaded.

You can continue with the proposal now.

# KC – System is Processing



**DO NOT TOUCH!**

Be patient.

This screen will go away when the system is done with its business.  
Clicking on the “Return to Portal” button can cause issues.

# Budget Troubleshooting

The screenshot shows a web-based budget management interface. At the top, there is a navigation bar with 'action list' and 'doc search' buttons on the left, and 'Logged in User: 238800' on the right. Below this is a 'Budget Document' header with a help icon. A secondary navigation bar contains tabs for 'Budget Versions', 'Parameters', 'Rates', 'Summary', 'Personnel', 'Non-Personnel', 'Distribution & Income', 'Modular Budget', and 'Budget Actions'. A message below the tabs states 'Document was successfully saved.' The main content area shows three expandable sections: 'Research F & A', 'Fringe Benefits', and 'Inflation', each with a 'show' button. At the bottom of the interface, there is a row of action buttons: 'sync all rates', 'reset all rates', 'save', 'reload', and 'close'.

If using an old or copied proposal, you may need to “Sync” All Rates and/or “Reset” All Rates on the Rates Tab in the budget.



# Questions?



# Final Notes

- Both presentations will be available on SPA and SPAC websites
- Remaining Quarterly Meeting for 2014:
  - November 20<sup>th</sup>, 2:30 – 4:00, Location TBD
- Thanks for joining us today!