UMMS Research Administration Update

June 2021
Agenda

- Bank of America Pre-Paid Card Program
- RMS Resource Center Update
- PeopleSoft Data Conversion & Interface Update
- RMS Stats
Bank of America (BOA) Prepaid Card Programs

June 2021
Bank of America (BOA) Prepaid Card Programs

Please contact Cindy Nicholson for program details

Email: ParticipantPayments@umassmed.edu

Link for: BOA PAT Job Aids & Training Materials
New Layout & Trending Now
Visit the RMS Resource Center for the latest Tips & Tricks for navigating the platform...

<table>
<thead>
<tr>
<th>RMS Tips &amp; Tricks - Here are some tips that might help in navigating RMS!</th>
</tr>
</thead>
<tbody>
<tr>
<td>RMS Email Sign On - Memorial</td>
</tr>
<tr>
<td>RMS Naming Conventions</td>
</tr>
<tr>
<td>RMS Email Distribution Tips</td>
</tr>
<tr>
<td>SF424 Create &amp; Update Form User Guide</td>
</tr>
<tr>
<td>Research Plan Update User Guide</td>
</tr>
<tr>
<td>RMS Simple Proposal Approval Steps User Guide</td>
</tr>
</tbody>
</table>
NIH MPI Grant Role Selection

Add Institutional Proposal Staff

1. * Staff member:
   Michael Green

2. * Project role:
   - Co-Investigator
   - Consultant
   - Co-PD/PI
   - Faculty
   - Graduate Student
   - Other Professional
   - Post Doctoral
   - Post Doctoral Associate
   - Post Doctoral Scholar
   - Technician
   - Undergraduate Student
   - Secretarial/Clerical
   - [PD/PI]

3. Support documentation:

4. [Update]

5. | Last Name | First Name | Key | Role |
<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
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<tbody>
<tr>
<td>Green</td>
<td>Michael</td>
<td>yes</td>
<td>PD/PI</td>
</tr>
<tr>
<td>Wolfe</td>
<td>Scot</td>
<td>yes</td>
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</tbody>
</table>
# Graduate Student “Fringe” Calculation

<table>
<thead>
<tr>
<th>Person:</th>
<th>Staff Member To Be Determined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role:</td>
<td>Graduate Student</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Period 1</th>
<th>8/28/2021 - 8/27/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effort:</td>
<td>100%</td>
</tr>
<tr>
<td>Sal Req:</td>
<td>100%</td>
</tr>
<tr>
<td>FB Rate:</td>
<td>13.802%</td>
</tr>
<tr>
<td>Base:</td>
<td>$34,000.00</td>
</tr>
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| Salary Cost Total: | $34,000.00 |
| Benefits Cost Total: | $4,693.00 |
| Personnel Cost Total: | $38,693.00 |
**Detail Cost Tables**

4. Will you require detailed budget tables for this budget submission?

- Patient Care: [ ] Yes [ ] No
- Animals: [ ] Yes [ ] No
- Travel: [ ] Yes [ ] No
- Trainee: [ ] Yes [ ] No
General Cost Definitions
RMS Generated R&R Budgets... Let RMS do the work!

5. *Select the direct sponsor:*

- DUKE UNIVERSITY
  - If the direct sponsor is not listed, type their name here:
  - If this will be a flow-through, select NIH-NATIONAL INSTITUTES OF

**Activity**

- Budget Exported to Subaward PDF
- Latest Subaward PDF version is available here
  - Subaward Budget Export.pdf

- Copy
- Create Additional Budget
- Export Budget to Subaward PDF
- Export Budget
- Send Email
- Assign Specialist
- Manage Guest List
Reminders:
- Location on Funding Proposal
- Graduate Student Fees

1. * Applicant institution:*

   Univ of Massachusetts Med Sch Worcester

   a. Select additional project or performance locations:

   Name

   LAZARE RESEARCH BUILDING
RMS | PeopleSoft Data Conversion & Interface Update
CONVERSION DATA

What information was converted from PeopleSoft to RMS on April 20th?
- All Active Awards (1460 awards) were brought into RMS from PeopleSoft.

How do I know it’s converted data?
The award number will have these designations:
- WCH, WCT, WDC, WPD, WPH, WPM, 000
NEW DATA

What happens to new data on PeopleSoft & RMS?

In RMS:
- All new funding proposals are to be created in RMS
- All award modifications effective 04.20.2021 are processed in RMS

In PeopleSoft:
- All new proposals in PS will continue to be generated in PS
- PIN reports continues to be processed in PS and forwarded to Departments by the GA's
What information DOES feed from RMS to PeopleSoft? And when does it happen?

There is an interface between PeopleSoft & RMS each evening:

- All activated awards in RMS will interface into proposals in PeopleSoft.
- People, Departments, Vendors, & Sponsors will feed from PS to RMS.
What information DOES NOT feed from RMS to PeopleSoft?

- Modifications processed in RMS DO NOT automatically feed to PS and visa versa.
**MODIFICATION REQUEST…** When do I send a modification to my OSP Specialist?

- Send an RMS Modification Request when it is for an action your OSP Specialist is not aware of.
  - Rule of thumb… When in the past a form was required (exception APR).
- Otherwise OSP will process modifications from items received in the Research Funding email.
  - Examples would include… Notice of Award, Revised Continuation, SRA Amendments, etc.
**MODIFICATION...** What does it look like?

- A Modification request is sent from the Department.

- From the Awards tab enter the award number.

- Find the Modification desired and click on the Modification link.
HISTORY

- Under the “History” tab find documentation including the NOA.
- Click on the NOA link.
<table>
<thead>
<tr>
<th>Financial Account Name</th>
<th>Period Number</th>
<th>Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Authorization</th>
<th>Authorized Amount</th>
<th>Awarded Amount</th>
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<tr>
<td>Period</td>
<td>Start Date</td>
<td>End Date</td>
<td>Funded Amount</td>
<td>To Project ID</td>
<td>Budget Posting Status</td>
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INTERNAL FORMS

- No longer using APR, NCE, BRPA.

- Complete the Request Modification Process in RMS.

- New Award Provisional Sponsored Account Request (NAPSAR) - still needs to be completed and signed to request an Account set up.
Funding Proposals (FP)
Departmental builds/OSP FP shells for previous PRF’s/CT

Modifications ( Mods ) processed
Amendments/Continuations/Re-budget/NCE’s/
 Restoration of Funds/PI Change

New Awards (AWD)
Federal (13) Incoming Subcontracts (11) Foundation (7) Industry (7) State (1)

SF424 Proposal “Success”

SF424 Proposal in Pre-Submission
Thank you.