



UNM HEALTH SCIENCES | UNM HEALTH

Contract & Grant Accounting Update

April 21, 2023

FSD Inquiry Form Update



HSC FSD Inquiry Form

Please let us know if you have any question, ideas, concerns or feedback for the UNM Health Sciences Center, Finance & Administration team.

Thank You for your submission!

Department

Please select which department your request is for. If you are not sure leave this field blank.

- HSC Contract & Grant Accounting
- HSC Sponsored Projects Office
- HSC Unrestricted Accounting
- RAFT Topics
- Other/Unknown

<https://app.smartsheet.com/b/form/06140ff3e615443587961e68f04fa592>

2023 Quarterly C&G Compliance Trainings



- May 26, 2023, 9-10 a.m.
- This meeting with focus on Common Compliance Issues and UNM Travel Booking Tool
- Sign up - <https://app.smartsheet.com/b/form/68763b3f29d04e79bcc8e1396e4a76a8>

MyReports- FNRGSLB - Grant Salaries Report

HtmlPage — Mozilla Firefox
https://myreports.unm.edu/ibi_apps/run.bip?BIP_REQUEST_TYPE=BIP_RUN&BIP_folder=IBFS%25 80%

MyReports
myreports.unm.edu

FNRGSLB - Grant Salary Labor Benefits Encumbrance Report

Index ENTER INDEX.
USE * TO WILDCARD ENTRIES, INDEX BEGINNING 997 LIKE 997*, OR ENDING 20J OR 20R AS *20*

SEARCH RESULTS:

SELECTED VALUES:

REPORTING PERIOD: **THROUGH PERIOD:** **GROUP BY:**

Display Encumbrances
 Show labor redistribution detail
 Aggregate labor distributions by pay number
 Order by Transaction Date

SELECT REPORT OUTPUT TYPE
 HTML XLSX HTML ACTIVE REPORT PDF

Signature Authorization Forms

- We will add PI attestation to the - Submit For Department Review Endorsements
- A new activity will be added to all Click records for OEI

Sponsored Project Year End Billing

- State of New Mexico Agency Deadlines are being verified.
- Once all agency deadlines have been identified and confirmed, dates and deadlines will be communicated in the Sponsored Project Offices Weekly Newsletter.

What is Effort Certification?

- The Principal Investigator or responsible official certifies that the salaries and wages on restricted awards were reasonable in relation to the work performed.
- Policy E120 in the Faculty Handbook
- Uniform Guidance requirements under 2 CFR 200.430

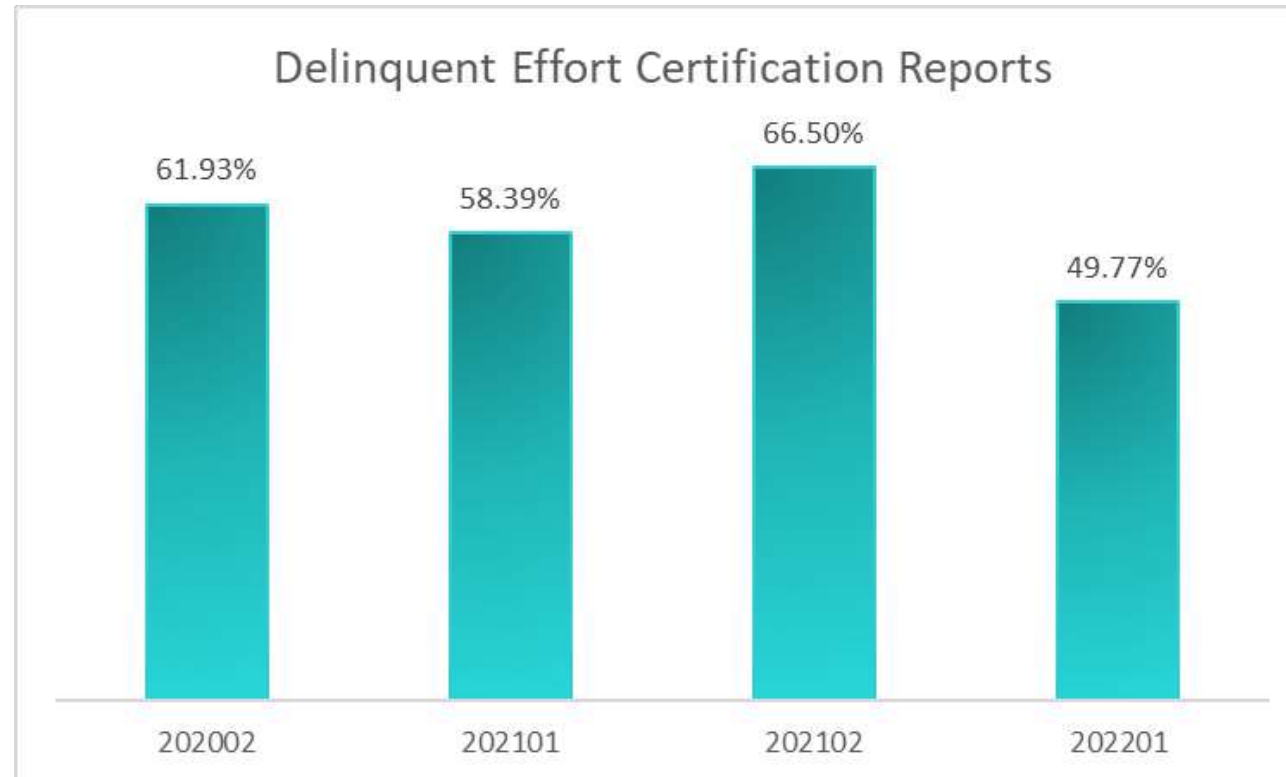
Current Process

- Semi-Annually
- By employee
- Exempt (5R) including faculty, staff, and post-docs
- Pre-review completed by department employees
- Certification completed by PIs

Issues with Current Process

- Multiple pre-reviewers and PIs per employee
- Requires Learning Central training and BAR role
- Email Notification errors and issues
- Manual work involving FSM
- Requires MyReports and other reporting options to assist with process
- System is not user-friendly or intuitive

Effort Certification Delinquencies



- 202202 EC is currently in process

New Process

- By Fund/Index
- One certification for all employees on fund
- Budget Period End Date or Annually (multi-year)
- Pre-review by department employee – Always one person
- Certification by PI – Always one person

Advantages

- Timelier review and certification
- No delay from project end dates and certification
- Less certifications required – less administrative burden for PI
- Access to certification can be obtained directly from emails
- No BAR role necessary
- Access to salary and operating fund expenditures in system
- Elimination of multiple pre-reviewers and/or certifiers
- Matches audit requests

Next Steps

- Continue technical work in APEX
- Beta Testing by departmental personnel
- Schedule training sessions and development of training material
- Go live – estimated Fall 2023

Questions





HEALTH SCIENCES LIBRARY
& INFORMATICS CENTER

April 21, 2023

ENHANCE YOUR SCHOLARLY VISIBILITY WITH ORCID

LORI SLOANE, HSLIC DATA MANAGER

What is ORCID and why do you need one?

Open Research and Contributor ID

It is a not-for-profit organization with the vision to create a “world where all who participate in research, scholarship, and innovation are uniquely identified and connected to their contributions across disciplines, borders, and time.”





<https://orcid.org/0000-0001-2345-6789>

ORCID iD icon

Text

Unique, persistent identifier for researchers



https://orcid.org/
0000-0002-1189-6338

Websites & social links >

College of University Libraries & Learning Sciences Faculty Profile

Other IDs >

ResearcherID: O-7624-2017
Scopus Author ID: 57195918246

Keywords >

Libraries, STEM, Life Sciences, Information Literacy, Outreach, Archives

Countries >

United States

Name

Amy Jankowski

Activities

Expand all

> **Employment (3)**

Sort

> **Education and qualifications (2)**

Sort

> **Membership and service (1)**

Sort

∨ **Works (5)**

Sort

Strategic source evaluation: addressing the container conundrum

Reference Services Review
2019-08-01 | Journal article
DOI: [10.1108/rsr-04-2019-0024](https://doi.org/10.1108/rsr-04-2019-0024)
Part of ISSN: [0090-7324](https://www.issn.org/issn/0090-7324)
Part of ISSN: [0090-7324](https://www.issn.org/issn/0090-7324)

[Show more detail](#)

Source: Amy Jankowski

Biology Student Perceptions of Information Literacy Instruction in the Context of an Essential Skills Workshop Series

Issues in Science and Technology Librarianship
2019-07-05 | Journal article

[Show more detail](#)



Lambert, Christophe G. | Professor of Medicine

Positions

► Informatics Core Lead, [Clinical and Translational Science Center](#), [Health Sciences Center](#) 2018 -

[Co-author Network](#)

[Map of Science](#)

[Co-investigator Network](#)

I received my PhD in Computer Science from Duke University in 1997. In August 2014, following a faculty appointment at Montana State University [Department of Computer Science](#), and nearly 15 years as CEO of a bioinformatics software company, [Golden Helix](#), I became a faculty member in the University of New Mexico [Center for Global Health](#), [Division of Translational Informatics](#), and [Department of Internal Medicine](#).

My research areas include clinical research informatics, bioinformatics, and s (... [more](#))

Contact Info

CGLambert@unm.edu
 CGLambert@salud.unm.edu

505-272-9709

Websites

- [Orcid](#)
- [Global Health Informatics](#)
- [Research Gate](#)
- [Google Scholar](#)

<https://orcid.org/0000-0003-1994-2893>

Websites & social links

- University of New Mexico Health Sciences Center
- PubMed
- Google Scholar
- ResearchGate
- LinkedIn
- YouTube
- Vimeo
- Golden Helix blog articles

Is this you? [Sign in to start editing](#) Printable version

Published name
Christophe Gerard Lambert

Name
Christophe Gerard Lambert

Activities [Expand all](#)

- **Employment (1)** [Sort](#)
- **Education and qualifications (3)** [Sort](#)
- **Funding (8)** [Sort](#)
- ▼ **Works (50 of 55)** [Sort](#)

Items per page: 50 Page 1 of 2

Genetic variation in CSF2 (Sg31.1) is associated with longitudinal susceptibility to pediatric malaria, severe malarial anemia, and all-cause mortality in a high-burden malaria and HIV region of Kenya.

Tropical medicine and health
2022-06-25 | [journal article](#) [Show more detail](#)



Federal Funding Mandates

Federal Funding Requirements



- ❑ National Security Presidential Memo. 33 4(b)v) (Jan. 2022).

“Consistent with applicable Federal laws and statutory authorities, within 1 year of the date of this memorandum, funding agencies shall establish policies regarding requirements for individual researchers supported by or working on any Federal research grant to be registered with a service that provides a digital persistent identifier for that individual.”

- ❑ WH Office of Science and Technology Policy (August 2022)

By December 31st, 2024, federal agencies should submit to OSTP [an] update to their public access plans specifying approaches taken to implement the [DPI] provisions. Agencies should complete and publish full policy development for plans implementing these provisions by December 31st, 2026, with an effective date no later than one year after the publication of the agency plan.

ORCID

- What Is ORCID?
- Why ORCID?
- Get an ORCID
- Add Your Works
- Use Your ORCID

What Is ORCID?

ORCID—or Open Researcher and Contributor Identifiers—are unique IDs that you can use as a researcher to identify your academic work. The IDs help funders, publishers, scholarly societies, and other researchers to quickly find and distinguish your work from materials created by other researchers with similar names. ORCIDs are being used increasingly by publishers ranging from the Royal Society to PLOS, the American Geophysical Union, IEEE, and Wiley.

To get started with ORCID, follow these three steps:

- 1.) Get an ORCID for free at <https://orcid.org/register>. Use your UNM email to register.
- 2.) Add your scholarly works: Once you've created your ORCID ID, you can add works to your record, set up automatic updates, or delegate management of your account to someone else.
- 3.) Use your ORCID ID: Include your ORCID ID on your webpage, when you submit publications, on grant applications, and in other research workflows to ensure that you get credit for your work.



Find Guides Search

Librarian



Jon Wheeler

Email Me

Schedule Appointment

`https://libguides.unm.edu`

UPDATE

NIH DMSP Budgeting & Application Instructions - Tip Sheet



Ask a Librarian
Chat | Email
TXT (505) 431-4711

University Libraries / Research Guides / NIH Data Management and Sharing / Budgeting

NIH Data Management and Sharing

Information on allowable costs and other resources.

Home
Data management and sharing plans
Budgeting
Clinical and human participants research
Data Ethics
Data sharing and preservation

Budgeting Resources

- [Forecasting Costs for Preserving, Archiving, and Promoting Access to Biomedical Data](#)
Studies from the National Academies of Sciences, Engineering, and Medicine that provide frameworks for costing out data management and preservation.
- [Forecasting Costs for Biomedical Data: Public Webinars](#)
The webinar series focus on approaches for research communities, funding organizations, and data storage Providers.
- [Grants & Funding: Develop Your Budget](#)
From the NIH grant application guide.
- [National Institute of Mental Health Data Submission Cost Estimation Tool](#)
Link to an Excel worksheet for cost estimation.
- [Council on Government Relations Readiness Guide Chapter 4 - Budgeting & Costing](#)
Page includes a link to download the chapter in PDF format.
- [NIH DMSP Budgeting & Application Instructions - Tip Sheet](#)

UNM Service Catalog

Help with budgeting is available from multiple research support services.

- [UNM Libraries Research Data Services](#)
- [UNM Libraries Ask a Librarian](#)
- [UNM HSLIC Ask a Librarian](#)
- [Faculty Research Development Office](#)

<https://libguides.unm.edu/nih-data-sharing>

R FOR REPRODUCIBLE SCIENTIFIC ANALYSIS

Presented in collaboration from HSLIC, CTSC, EPSCoR and University Libraries



UNM Health Sciences Researchers are invited to participate in a 5-day workshop to learn about manipulating, visualizing, understanding, and analyzing your data in R. R is a programming language coded in the user interface tool, RStudio.

MAY 15- 19, 2023

1:30-4:30 P.M. | MONDAY - FRIDAY

CTSC Conference Room

UNM Health Sciences North Campus



Registration - FREE

Open to anyone who works or studies on the HSC campus.



Register by scanning the QR Code or going to the link: <https://goto.unm.edu/registration>

Space provided for 20 in-person participants, others may attend virtually through Zoom.

Sample Schedule

DAY 1

Introduction to R, RStudio and RMarkdown. The RMarkdown is used for writing reproducible, dynamic reports with R. Learn how to manage projects in R.

DAY 2

Manipulation of data tables

DAY 3

Creating publication-quality graphics with ggplot2

DAY 4

Introduction to logistic regression

DAY 5

Making predictions from a logistic regression model

HSLIC in coordination with CTSC, University Libraries and EPSCoR are hosting the "R for Reproducible Scientific Analysis" Workshop on May 15-19th. Everyone is welcome to attend.

References & Credits

<https://info.orcid.org/what-is-orcid/>

[National Security Presidential Memo. 33 4\(b\)v\) \(Jan. 2022\)](#)

[WH Office of Science and Technology Policy \(August 2022\)](#)

[UNM ORCID Library Guide](#)

[UNM NIH Data Management and Sharing Library Guide](#)

[Slide Content, by Amy Jankowski and Jonathan Pringle](#)

[ORCID images and branding](#)

US Capitol, by snty-tact,

https://upload.wikimedia.org/wikipedia/commons/8/88/WDC_Capitol_1.jpg

HSC sponsored projects/ RAFT Training Click-Agreements (SUBAWARDS)



Logging In

Enter your User Name and Password here:



UNM HSC Login

Non HSC Login

If you are a member of UNM HSC and have a current HSC NetID, please click on the UNM HSC Login button.

All other, please click on the Non HSC Login button (includes UNM main campus)

Secure Logon
for University of New Mexico
Health Sciences Center

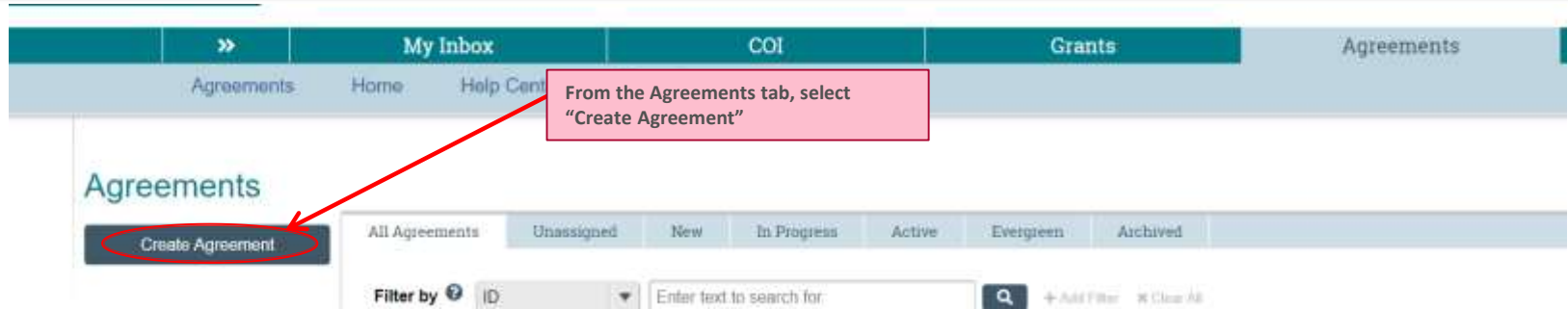
HSC NetID

Password

Logon

- This login screen can also be reached directly at: <https://era.health.unm.edu/Agreements>
- If you have problems logging in, please contact the administrator below:
 - Sean Gonzales, SGonzales@salud.unm.edu, 505-272-3495

Creating a New Subaward Agreement



Note The department is to initiate ALL New Subawards and Subaward amendments in the Agreements module.

Creating a New Subaward

Agreement Upload

1. Agreement manager/Principal investigator:

Sean Gonzales

2. *Agreement creator/administrator:

Caitlin Vinyard

3. * Upload agreement draft: (or check the box below)

 FDP_CR_2020_revised_1_11_21_MAPPEDSUB00000034.pdf(0.01) ...

First draft to be generated internally?

For Subawards:
Please check off "First Draft will be generated internally". We generally generate the subaward agreement for outgoing subawards. In very rare cases We will use the subawardee's template.

Creating a New Subaward Agreement

4. Title: ?

SUBTEST

Add the Agreement Name. Be sure to add the related Grant "FP Number" in front the add a dash and the title (i.e. FP1921 – Making the World a better place).

5. * Agreement type:

Subaward Agreement

Select the Agreement Type(Subaward Agreement). A subaward agreement record can be created from the time that a new grants record is created all the way to the time of award, but should not be submitted to SPO until the time of award.

6. Description:

Add the Agreement Description

7. Supporting documents:

+ Add

Name

There are no items to display

Add any and all supporting documents (much like Grants, this system will be a document resource for you).

Creating a New Subaward Agreement

Be sure to enter as much information as you can as this will be useful for contacting the contracting party

Be sure the submitting department is correct. This can be edited.

Make sure to fill out expected start and end dates.

General Information

1. * Select an organization:
Dacham America, Inc.
2. Contracting party contact name:
3. Contracting party contact e-mail:
4. Contracting party contact phone:
5. Agreements collaborators:
6. Submitting Department:
7. PI ORO Code:
8. Expected project start date:
9. * Expected project end date:
10. Negotiation start date (SPO only):
11. Negotiation end date (SPO only):

If you cannot find the sponsor you need, simply enter their information here and click "SAVE". An email will be sent to SPO/Pre-Award to update the system.

Be sure to make everyone in the institution who will be working on the agreement "Agreements Collaborators"(including yourself). This will be especially important if the person is not in your department as we are adjusting security parameters for department personnel to be able to see all records in their department. If the person is not in your department, but need to see the record, then this is the only way to allow access. This also gives edit rights and makes sure important emails from the system to be sent to staff.

Always Click "Save" first, and then click "Continue".

Creating a New Subaward Agreement

You Are Here: [UNM On Test at 11/11/2016 09:00:00](#)

Editing: SUB00000140

Agreement Information

1. * Prime funding agency:
Federal Bureau of Investigation
2. Prime award ID:
164321
3. Subrecipient PI first name:
John
4. Subrecipient PI last name:
Smith
5. Direct Costs:
150,000
6. Indirect Costs:
66,000
7. * Total Costs:
\$150,000.00
8. Fiscal monitor's name:
Alyson Flores (Kamala)
9. * Carryover: Yes No
* Please elaborate:
10. Subject to FFATA: Yes No
11. Fixed-price subaward: Yes No
12. Banner fund number:
181234

Be sure to fill out all of this information. The PRIME award ID and whether it is subject to FFATA(how to find FFATA explained below) , The Fiscal Monitor and banner fund number will be the same as for your Grant record related to this agreement.

If there is Carryover or “Carry forward”, then please elaborate as to why as it is UNMHSC policy to not allow automatic carryforward and any carryforward needs justification. This box will only appear if “yes” is selected for question 9.

FFATA (Federal Funding Accountability and Transparency Act) information can be found in the NOA(Notice of award) in the Grants module. It can either say Subject to FFATA, Subject to Federal Funding Accountability and Transparency Act, or subject to the transparency act. I recommend downloading and opening the PDF, pressing CTRL + F on your keyboard and typing in “subject to”, and then seeing all of the items that your award is subject to. If you do not see anything that looks like example to the right or what has been mentioned, then odds are your grant or contract isn't subject to FFATA.

If the banner fund number isn't available in the grants record, then your Subaward Specialist will fill this out when the number becomes available.

Based on the project period start date of this project, this award is likely subject to the Transparency Act subaward and executive compensation reporting requirement of 2 CFR Part 170. There are conditions that may exclude this award; see <http://grants.nh.gov/grants/policy/awardconditions.htm> for additional award applicability information.

Where Do I Find the Prime Agreement/Award?

The screenshot shows the 'Grants' module in the system. The 'Test' record is selected, and the 'SPO Additional Documents' section is expanded. The 'Awards' category is circled in red, and a red arrow points from a text box to it.

SPO Internal	Proposal/SPO Info	Awards	Exceptions	Outgoing Sub-Awards
Internal Budget Worksheet (IBW) There are no items to display	Proposal There are no items to display	Award Document There are no items to display	FA Waiver There are no items to display	Subcontract There are no items to display
Award Budget Sheet	RFAs or Application Guidance There are no items to display	Timeline Waiver There are no items to display	Unrestricted Subcontract There are no items to display	RTSP - MCE Payment Due Invoice There are no items to display
Cost Share Form	Progress Report There are no items to display	No-Cost Extension There are no items to display	PI Effort Exclusion There are no items to display	FAA Rate Agreement There are no items to display
HSC F&A Split Budget Detail (or F&A Split Form) There are no items to display	Just in Time Info There are no items to display	Early Termination Attachment Building Modification Form	Letter of Intent There are no items to display	Copy of Check There are no items to display
Main Campus F&A Split Budget Detail (or F&A Split Form) There are no items to display	Misc. Documents There are no items to display	Other Exceptions There are no items to display	Budget & Budget Justification There are no items to display	Program Income w/ASB There are no items to display
Vice Chancellor Approval Document				
Export Control				
Export Control Clearance: Name There are no items to display			Debarment Verification There are no items to display	CAOA Correspondence There are no items to display
VA MOU			Correspondence There are no items to display	
Change of Institution/PI There are no items to display				
Debarment Verification				

The Prime Agreement or Award can be located in the Grants Module-> In the Awarded Record-> Under SPO Additional documents.

Creating a New Subaward Agreement - Documents

You Are Here: SUBJECT
Editing: SUB00000018

Subaward Uploads

- 1 Prime award/agreement:**
+ Add
None
SP22481 83148 MOD1 V2 (RIS 01)
- 2 Subrecipient facepage or letter of intent:**
+ Add
None
There are no items to display
- 3 Subrecipient statement of work:**
+ Add
None
There are no items to display
- 4 Subrecipient budget & justification:**
+ Add
None
There are no items to display
- 5 Subrecipient F&A rate agreement:**
+ Add
None
There are no items to display

Be sure to add any uploads that don't have "(SPO Only)" noted in their text.

Upload the prime agreement here. If this is a new year of funding, then ALWAYS add the NEW prime award for that year.

If you cannot find one of the documents, please ask your subaward specialist as to how to best obtain the document. They are always happy to help!



Creating a New Subaward Agreement – Documents Cont'd

6. COI documentation (Either the subrecipient is listed in the FDP Clearinghouse, or they have been added to the Click record as non-UNM Personnel and have/are completing a COI disclosure) (SPO Only):

+ Add
Name
There are no items to display

7. Debarment printouts for subrecipient institution and subrecipient PI (SPO Only):

+ Add
Name
There are no items to display

8. SAMS printout (SPO Only):

+ Add
Name
There are no items to display

9. Export control form + clearance (if foreign subaward):

+ Add
Name
There are no items to display

10. Automatic carryforward approval (if applicable, see the Internal Policy on Auto CF located on the N: Drive):

+ Add
Name
There are no items to display

11. Special approvals/Notes/Other:

+ Add
Name
There are no items to display

12. Subrecipient W-9 (W-8 if foreign):

+ Add
Name
There are no items to display

13. Fully executed email to subrecipient (SPO Only):

+ Add
Name
There are no items to display

14. Correspondence:

+ Add
Name
There are no items to display

15. NCE verification (PI/Sponsor/FM) (if applicable) (SPO Only):

+ Add
Name
There are no items to display

16. Historical Risk Assessment Questionnaire (SPO Only):

(None) Upload

17. Additional comments:

If this is an amendment, and there is no change in scope of work, then you can add this into the comments here. You can also add any pertinent information regarding the uploads here whether it is a new agreement or an amendment.

Do Not upload anything into the Historical Risk Assessment questionnaire. If SPO decides there should be something here, then we will upload info here.

NOTE - For amendments do not delete "old files" you can add new ones with the date and SPO will determine whether certain docs need deleting.

Creating a New Subaward Agreement (Risk Assessment)

Risk Assessment

Institution/Organization (Subrecipient Information)

1. Name: National Polioethropic Trust
2. * UEI Number: 12345
3. * EIN Number: 12345678
4. Banner Fund Number: 3245
5. Subrecipient Award Amount: \$550,000.00
6. * Federal: Yes No
7. * Non-Federal: Yes No
8. * CFDA Number: 03.012
9. Prime Funding Agency: National Council of State Boards of Nursing (NCSBN)
10. * Prime Award Amount: \$15,500,000.00

If this is a Federal Award, then be sure to mark Federal and Fill out the CFDA Number (This can be found on the prime award you downloaded from the grants record).

Be sure to fill out all of the info in this area.

DO NOT fill out any information below here on the Risk Assessment. The information below is "SPO Only".

Risk Factors Based on the Subrecipient Organization (SPO Only):

Creating a New Agreement

Editing: SUB00000018


Completion Instructions

You have reached the end of the Agreement form. Read the next steps carefully:

1. Click **Validate** to verify that all required questions in this Agreement form are answered.
2. Correct any errors or omissions and refresh the error report.
3. When no errors are reported, click **Finish** to exit the form.
4. From the workspace, click **Submit** to send the Agreement for review.

Whew, now we are done with the smartforms! Be Sure to click "Finish"!

 Exit

 Save

Finish

Creating a New Agreement

Pre-Submission

Created by: System Administrator
Agreement Manager: Emily Altman
Owner:
Created: 3/28/2021 7:36 PM
Received:
Modified: 4/27/2021 2:44 PM
Effective:
Expires:

Next Steps

Edit Agreement

Printer Version

View All Correspondence

Submit

Manage Ancillary Reviews

Assign PI Propos

Discard

Copy Agreement

Manage Relationships

1) This is the manage relationships activity. This will allow you to connect your agreement to a funding proposal (FP in the Grants module)(REQUIRED FOR A SUBAWARDS) or an IRB record. From the IRB platform you can relate IRB proposals to Funding Proposals and Agreements, and From Grants you can relate Funding Proposals to IRB Proposals and Agreements.

2) From here you will submit your record and it will be picked up by your assigned SPO person, or you can do any of the other activities here. Keep in mind that if you discard a record, then it cannot be brought back.

Managing relationships

The image displays three sequential screenshots of the 'Manage Relationships' web application interface. The first screenshot shows the 'Related Projects' section with a table of projects and a red arrow pointing to an ellipsis button. The second screenshot shows a modal window titled 'Select One or More Integration Projects' with a table of projects and a red arrow pointing to the 'OK' button. The third screenshot shows the 'Manage Relationships' page with a red arrow pointing to the 'OK' button in the bottom right corner.

ID	Name	PI First Name	PI Last Name	Title	Status

ID	Name	PI First Name	PI Last Name	Project Type	Project Status
<input type="checkbox"/>	TD Operations in Farms, Communities and Vehicles	Barbara	Ross	Funding Proposal	Final SPG Review
<input type="checkbox"/>	100019 Patients of Low Cognitive Test	Charles	Wagner	Funding Proposal	Awarded
<input type="checkbox"/>	ADSR-100 (Continuation)	Deanna	Orin	Funding Proposal	Final SPG Review
<input type="checkbox"/>	00-0017-01: Radiographic Section of Subgrade and Changes in Contingency of a Minimum of 2 Years After Transportation Project	Ashley	Kalin	Funding Proposal	Awarded
<input type="checkbox"/>	PEB0175 (Continuation)	Robert (Bob)	Orin	Funding Proposal	Awarded
<input type="checkbox"/>	00-000175 (Subaward) Person-Dependent Mobility Assessment of Older Adults with Dementia	Janice	Quarles	Funding Proposal	Awarded

Once Manage Relationships is Open you can click the ellipses button and find the correct related submissions and add them. Click ok and then click ok again on the bottom righthand corner. (Note: Always connect the Subaward to the most recent Grant number(So if its an amendment connect it to the new non-compete continuation if it is a new year.)

Finding Relationships

To find your related projects all you have to do is click the related projects tab at the bottom. The name is clickable and if you have access to the record in the other system, then you will be able to go to it.

Effective:
Expires:

Next Steps

- Edit Agreement
- Printer Version
- View All Correspondence

- Submit
- Manage Ancillary Reviews
- Assign PI Proxies
- Discard
- Copy Agreement
- Manage Relationships

Supporting documents: There are no items to display

Description:



Communication History Contacts Snapshots Related Projects Documents

Funding Proposals

ID	Name	Investigator	Type	Status	Starting Date
HSC-9932	#8 SEER Patterns of Care, Diagnosis Year 2006	Charles Wiggins	Funding Proposal	Awarded	9/30/2007
FP0008344	TB Datafacton in Kenya, Zimbabwe, and Vietnam	Sanjeev Arora	Funding Proposal	Final SPO Review	2/11/2020

Sub Tabs

Shows Communication

Shows History, State Changes,
comments, etc...

Communication History Contacts Snapshots Related Projects Documents

Correspondence To Do

Filter by ⓘ Due Date ▾ Enter text to search for 🔍 + Add Filter ✕ Clear All

Correspondence Completed

Filter by ⓘ Due Date ▾ Enter text to search for 🔍 + Add Filter ✕ Clear All

Shows Documents uploaded

Shows Snapshots of changes made

Has a list of the contacts that were added.

Your agreement is active. What do you do?

Active

Created by: Emily Altman
Agreement Manager: Emily Altman
Owner: Susari De Los Santos
Created: 4/19/2021 6:38 PM
Received: 4/23/2021 10:46 AM
Modified: 4/28/2021 10:13 AM
Effective: 4/23/2021
Expires: 4/22/2022

Next Steps

[View Agreement](#)

[Printer Version](#)

[View All Correspondence](#)

[Create Amendment](#)

[Contact Owner](#)

[Assign PI Proxies](#)

[Copy Agreement](#)

[Manage Relationships](#)

If your agreement is ending or something needs to change with it, then you can create an amendment.

You can contact the SPO Specialist to see if there is an issue.

You can copy the agreement if there is a similar one you're doing.

You can Manage Relationships if there are other agreements, IRB's, or Funding Proposals that are Related.

Amendments

Active

Created by: Emily Altman
Agreement Manager: Emily Altman
Owner: Susan De Los Santos
Created: 4/19/2021 6:38 PM
Received: 4/23/2021 10:46 AM
Modified: 4/28/2021 10:13 AM
Effective: 4/23/2021
Expires: 4/22/2022

Next Steps

View Agreement

Printer Version

View All Correspondence

- Create Amendment
- Contact Owner
- Assign PI Proxies
- Copy Agreement
- Manage Relationships

If you hit create amendment, then much of the information from the parent is going to carry over. Remember much like grants continuations amendments can only be created from a “Parent Record”.

This is for any amendment you will be doing (e.g. year 2 etc..., more money, change in terms). When there’s new year of funding the Department must make an amendment record so the Subaward Specialist can start negotiations.

Need Help?

- Contact Sean Gonzales to schedule on-site assistance or if you have system problems, or email HSC-Preaward@salud.unm.edu:
 - Sean: Sgonzales@salud.unm.edu, 505-272-3495

And, as always, call or email your Sponsor Projects Officer for help!

TEAM SILVER CONTACTS

Marisa Sanchez, MBA, CRA
Manager
Email: MarSanchez@salud.unm.edu
Phone: (505) 272-3396

Sean Gonzales, CRA - Sponsored Projects Officer
Click ERA, Grants
Email: Sgonzales@salud.unm.edu
(505) 272-3495

Susan De Los Santos, BA CRA - Sponsored Projects Officer
Grants
Email: SDeLosSantos@salud.unm.edu
Phone: (505) 272-4685

Kenia Aguilar-Pineda - Sponsored Projects Officer
ECHO - All
Email: KAguilarPineda@salud.unm.edu
Phone: (505) 272-0157

Madison Dow - Sponsored Projects Specialist, Sr.
Outgoing Subawards
Email: Mdow@salud.unm.edu
Phone: (505) 272-6264

Gocelyn Beasley, CPMP, MHA - Sponsored Projects Specialist, Sr.
Contracts
Email: GBeasley@salud.unm.edu
Phone: (505) 272-9377

TEAM TEAL CONTACTS

Aida Andujo, MPA, CRA
Manager
Email: Aandujo@salud.unm.edu
Phone: (505) 272-1219

Caitlin Vinyard, CRA - Sponsored Projects Officer
Clinical Trials ALL HSC
Email: CVinyard@salud.unm.edu
Phone: (505) 272-4678

Siiri Wilson, M.S., J.D., LL.M. - Sponsored Projects Officer
Ancillary (MTA, CDA, OTHER)
Email: SiWilson@salud.unm.edu
Phone: (505)

Jessica Stanton - Sponsored Projects Officer
Grants
Email: JKStanton@salud.unm.edu
Phone: (505) 272-9327

Julie Gallegos - Sponsored Projects Officer
Contracts
Email: JGallegos@salud.unm.edu
Phone: (505) 272-5665

Dean VonFox, M.S. - Sponsored Projects Specialist, Sr.
Outgoing Subs/DUA's
Email: DVonFox@salud.unm.edu
Phone: (505) 272-4076

Key Dates and Information for FY23 Year End Close

Presented by:
John Brandt, Associate Controller
HSC Financial Services, Unrestricted Accounting
April 21, 2023

Chrome River Expense/Invoice Report Deadlines

Departments must submit by **Friday, June 30, 10:00 pm.**

* * * * *

Departments must approve by **Thursday, July 6**

* * * * *

Financial Services will review by **Friday July 7, 3:30 pm.**

PCard Report Deadlines

Departments must submit **AND** approve PCard Reports with a transaction date through 6/30/23 (FY23) by **Friday, July 7.**

* * * * *

The PCard department will review and approve PCard Reports through **Sunday, July 9.**

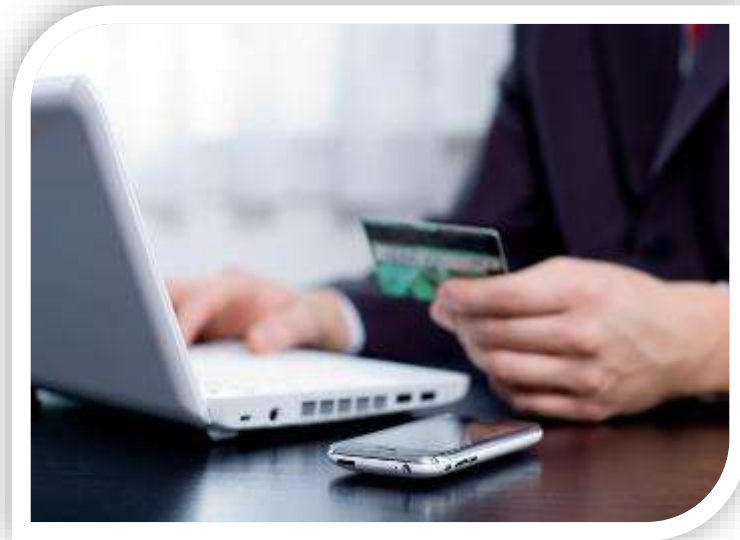
PCard Report Deadlines

Do not mix FY23 and FY24 purchases on the same report. Each report should contain only purchases from the same Fiscal Year.

* * * * *

Include “FY23” or “FY24” in the name of your report.

Tips for Meeting PCard Deadlines



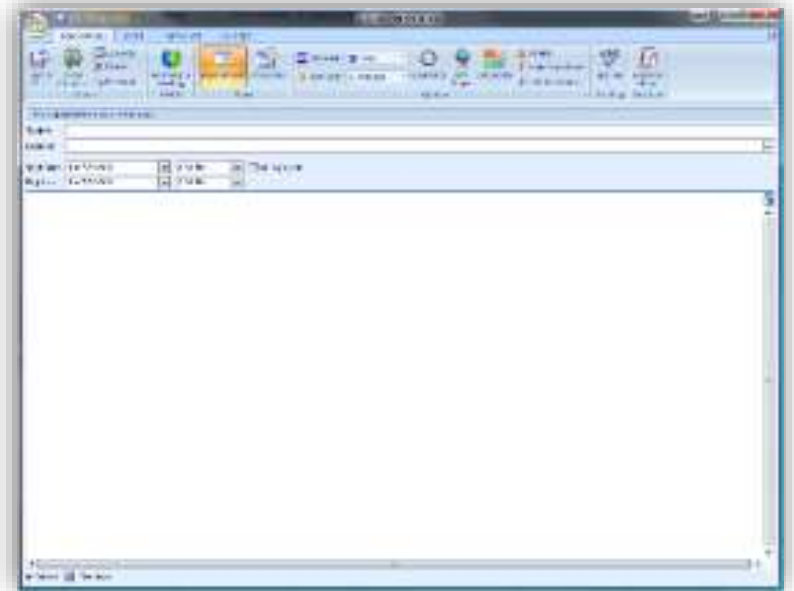
*Complete
PCard purchases
on or before **June 27.***

Tips for Meeting PCard Deadlines

- Check your CR eWallet daily.
- Be sure to read PCard department emails. These will be sent daily beginning around **June 27** to alert you to new items that need to be reconciled.

Tips for Meeting Chrome River Deadlines

*Add a daily reminder to
your calendar to check
on the status of all
Chrome River Reports*



Journal Voucher Deadlines

Departments must submit **AND** approve Journal Vouchers by **5:00 p.m. Thursday, July 6.**

* * * * *

Departments will not have access to create JVs from **July 6, 5:01 p.m. until July 18, 8:00 a.m.**

* * * * *

Financial Services will review and approve through **Friday, July 7.**

Helpful Tip

Sarah Martinez in SOM Finance Office will be available to enter material JVs for departments before **5:01 p.m., Friday, July 7.**

SMartinez@salud.unm.edu

2-0454

Labor Redistributions (PHAREDS) Deadlines

- ❖ All PHAREDS must be completed AND approved by **5:00 p.m. Thursday, July 6.**
- ❖ Departments will not have access to submit labor redistributions (PHAREDS) from **July 6, 5:01 p.m. until July 18, 8:00 a.m.**

NSAR Billing Deadlines

- ❖ All NSAR invoices for FY22 must be entered by noon **Friday, June 30.**
- ❖ NSAR backup must be emailed to HSC Unrestricted Accounting by noon **Friday, June 30.**

LoboMart Purchase Requisitions

FY23 requisitions greater than \$60,000 must be completed and approved by Departments on **Friday, April 28.**

* * * * *

FY23 requisitions \$5,001 to \$60,000 must be completed and approved by Departments on **Friday, May 26.**

* * * * *

FY23 requisitions under \$5,000 must be completed and approved by Departments on **Friday, June 2.**

Other Important Dates

Accounts Payable last day to cut checks for FY23 is
Monday, July 10.

* * * * *

Final FY23 MyReports will be available **Thursday, July 20.**

* * * * *

Financial Services Support Center information will email periodic reminders on key dates.

Final Tips



- ❖ If you haven't reviewed and reconciled your indexes ... **Start Now!**
- ❖ Do NOT wait until June 30 to submit Chrome River reimbursements. Get all reports submitted and approved as soon as you can. Verify all required backup is attached. This gives us time to review and make requests/corrections as needed to post in FY23.

Final Tips



- ❖ **PLAN AHEAD** - July 4 is a Tuesday. Some departments may have personnel on annual leave on Monday, July 3 and Tuesday, July 4.
- ❖ That only gives departments 2 days left (Wednesday, July 5 and Thursday, July 6) to meet the above deadlines. PCard transactions have a July 7 deadline.

Latest updates to Finance Fiscal Year End 2023
Close Schedule can be accessed at:

<http://fssc.unm.edu>