



TEXAS A&M SYSTEM
**Sponsored Research
Services**

Contracts & Grants Support Team Desk Manual

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Approver:	Jane Zuber, Director
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Award Processing – Initiating Award Set-Up Packages

Awards are received in various formats: emails, awards@tamus.edu and hard copies by mail.

Mail: Front Desk will date stamps awards and places in “Awards” box in mail room

CGST reviews award

Award is researched by looking into Maestro for proposal number if applicable or existing project.

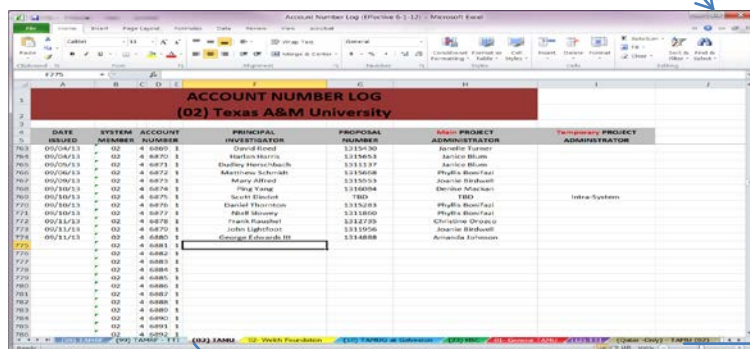
Determine if Award is:

- New
- Continuation
- Correction
- Extension
- Increase
- Interim Funding
- Reduction
- Release of Funds
- Renewal
- Revision
- Supplement

If New Award:

1. [K:\Contracts and Grants\Contracts & Grants Support Team\Award Logs](#) (Ag and TEES have their own logs)

Assigned new project No. “Excel Spreadsheet”



DATE	SYSTEM	ACCOUNT	MEMBER	NUMBER	PRINCIPAL	INVESTIGATOR	PROPOSAL	NUMBER	ADMIN	PROJECT	Temporary PROJECT
09/04/13	02	4	8880	1	David Reed		5313450		Rebecca Turner		
09/04/13	02	4	8870	1	Markus Harris		5313451		Rebecca Turner		
09/04/13	02	4	8871	1	Shellye Henschel		5313452		Rebecca Turner		
09/04/13	02	4	8872	1	Marlene Schmitt		5313453		Rebecca Turner		
09/04/13	02	4	8873	1	Mary Hefner		5313454		Rebecca Turner		
09/04/13	02	4	8874	1	Pang Yang		5313455		Rebecca Turner		
09/04/13	02	4	8875	1	Scott Elwood		5313456		Rebecca Turner		
09/04/13	02	4	8876	1	David Thompson		5313457		Rebecca Turner		
09/04/13	02	4	8877	1	Markus Harris		5313458		Rebecca Turner		
09/04/13	02	4	8878	1	Frank Russell		5313459		Rebecca Turner		
09/04/13	02	4	8879	1	Scott Elwood		5313460		Rebecca Turner		
09/04/13	02	4	8880	1	George E. Edwards III		5313461		Rebecca Turner		

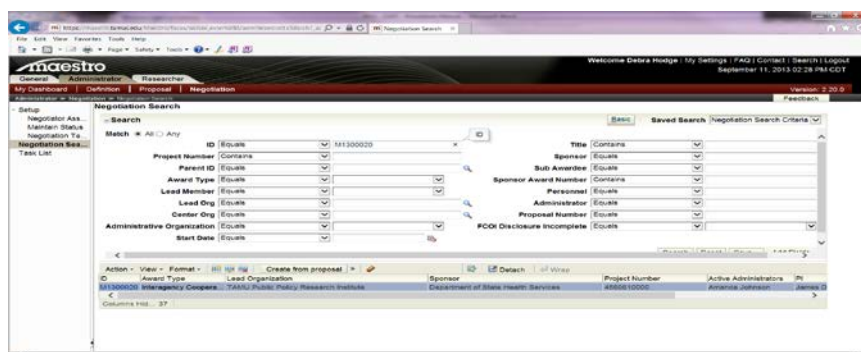
“See Bottom of screen”

Pick Entity Tab Click on the entity you need:

**RF, TAMU, TAMUG, TTI, TAMU-Qatar, HSC, Tarleton,
Welch Foundation, Prairie View**

Click on the “**Entity**” that the award applies to and assigned next available **Project/account number**:

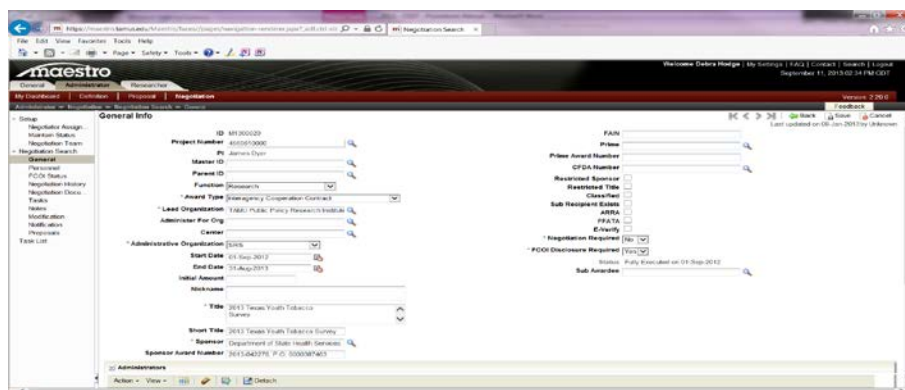
After all research is completed, print all documents:
Setup package is started:



Search for Sponsor, PI, Proposal Number, Title, Maestro ID (M#), etc. to make sure record is already in the system.

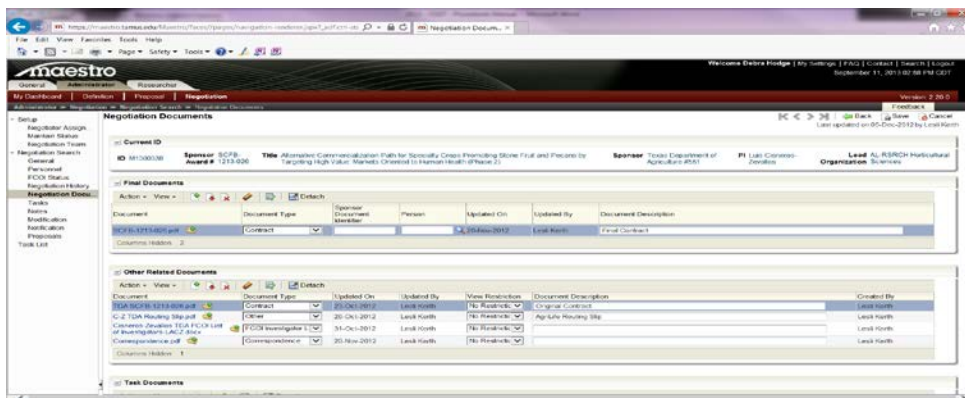
If a M# does not already exist in Maestro, then create a new M# by using one of the 2 methods:
If a proposal does not exist, use the Create New Record function. If proposal does not currently exist, an internal proposal will be prepared and Contract Negotiator will input Proposal number to link proposal to contract. Proposals>Create>Enter Proposal number.

If there is a proposal in Maestro, use the Create from Proposal button. The 'Create from proposal' function can only be used if the proposal is in one of the following statuses: Awarded, Submitted to Sponsor, or Award Pending

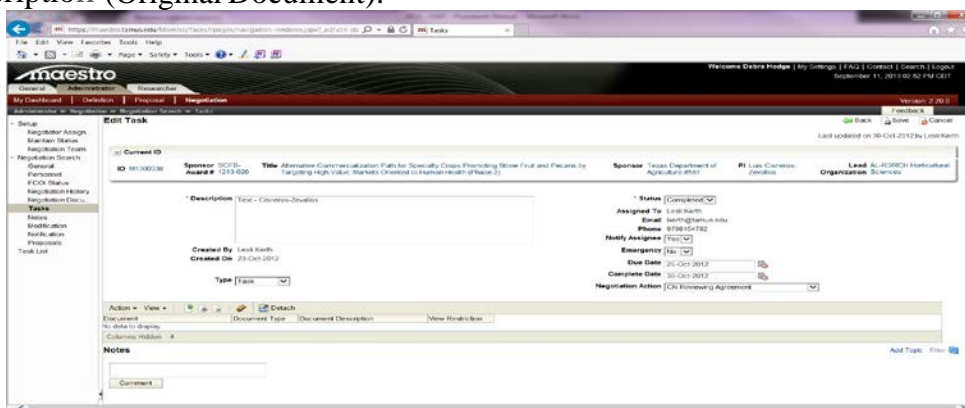


Fields on the **General Screen** with an asterisk* will be entered. Such *fields include PI, Function, Award Type, Lead Organization (System Member and PI's department), Administrative Organization (SRS), Title, Sponsor, CFDA number (if federal) and Negotiations Required. After the* or required fields are entered, click Save, then an M# will populate.

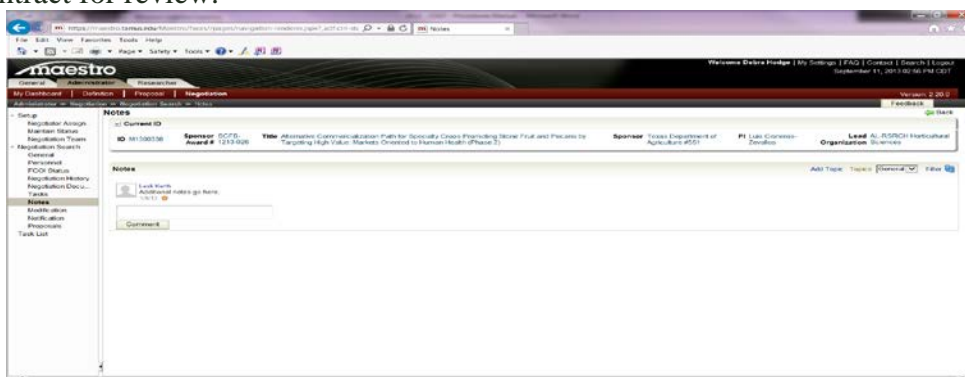
Input Contract Negotiator and Project Administrator associated with the System Member and Department.



Go to the **Negotiation Documents** and upload the original contract, routing sheet and related correspondence in the Other Related Documents section. When uploading, enter in the appropriate document type (i.e. Contract, Correspondence, or Other) and document description (Original Document).



Send a **task** to the appropriate contract negotiator or project administrator stating that they have a contract for review.



If you upload a hard copy of the original document, give the hard copy document to a Negotiator in a manila folder. On the **Admin Notes Screen** enter in a note/record that indicates hard copy to CN and project number.

After all information is entered into Maestro:

[illegible]

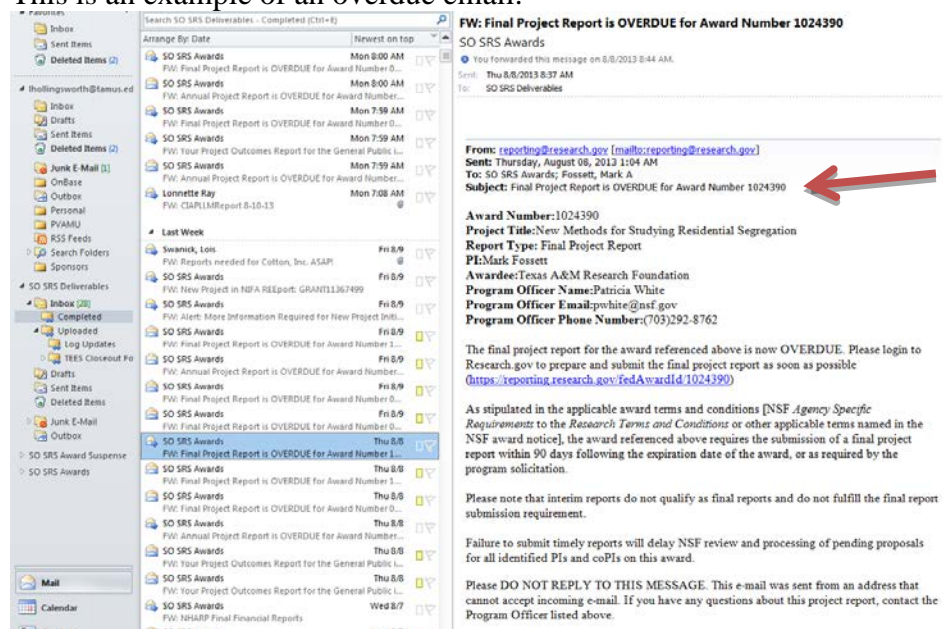
1. Place all Documents in a manila folder.
2. Print a copy of Award and other document related to setup.
3. Place Routing Sheet on top of manila folder and all other item inside, (Award, budget, all documents related to setup) rubber band package and distribute to Negotiator.

CGST will check the Deliverables Mailbox (SO SRS Deliverables deliverables@tamus.edu) in Microsoft Outlook. CGST will determine how to process the emails. These emails include various types of notices from sponsors, reports from Principle Investigators (PI) and Project Administrators (PA) and also forwarded messages from SRS resource email accounts, as well as individuals from TAMUS members.

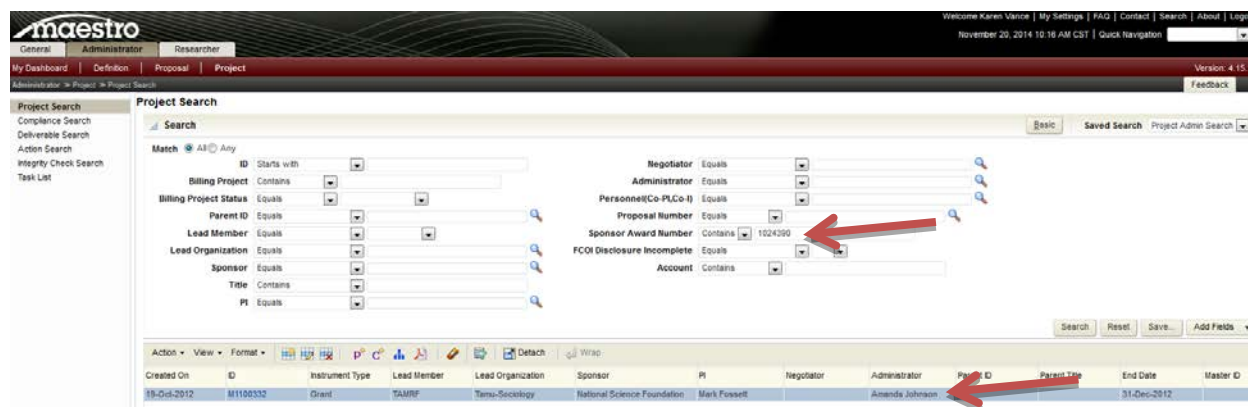
-
-
- SRS Contracts & Grants Support Team Desk Manual

2. OVERDUE emails should be forwarded to the PA. CGST will search Maestro to find the active PA for that award. After it has been emailed, move the email to the Completed subfolder.

This is an example of an overdue email.



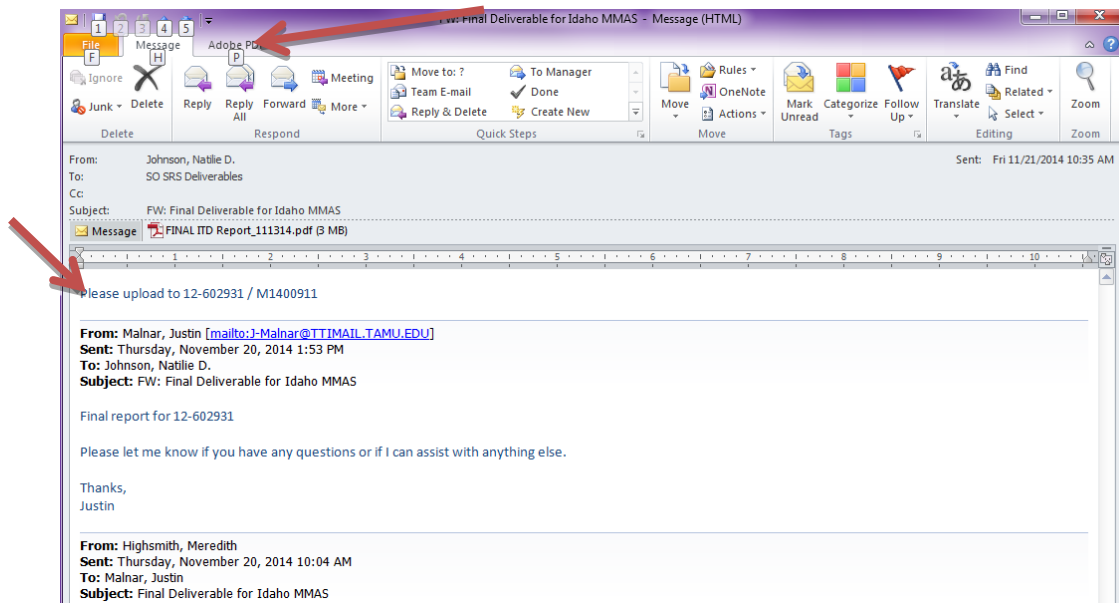
To find the correct PA use the award number at the top of the email. Copy that number and paste it to the Sponsor Award Number area in the Project Search page in Maestro. After Searching, the award should appear with various information as shown below:



Once the active PA is determined, forward the email and include the Maestro ID number. The email is then moved to the Completed subfolder.

Emails with or without reports attached are converted to PDF format and then uploaded in Maestro.

Below is an email with the report attached. Convert to PDF by choosing Adobe PDF as shown by arrow.



When saving to PDF, name the report using this format:
System Member–Account Number Type of Report

Types of Reports:

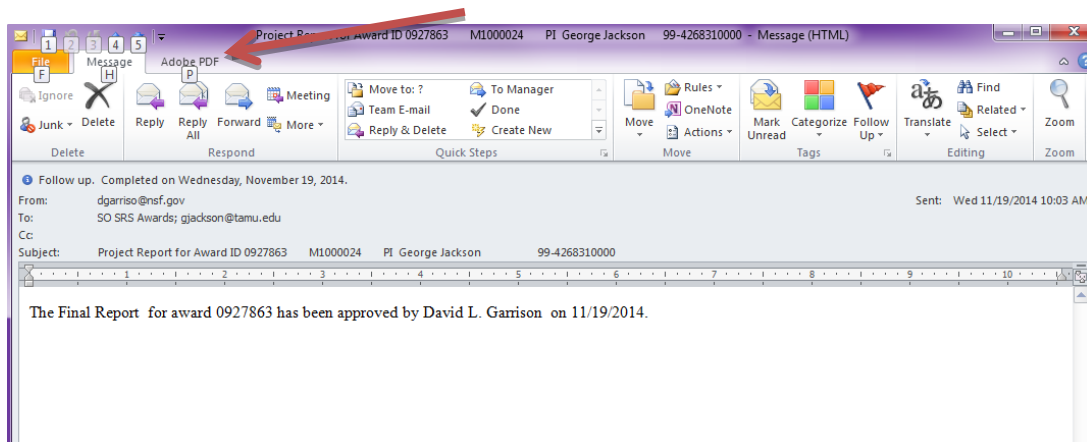
- M- Monthly Progress
- Q- Quarterly Technical
- P- Progress
- SA- Semi-Annual Technical
- AT- Annual Technical
- AI- Annual Invention
- FT- Final Technical
- FI- Final Invention
- O- Other

For example, this report would be 12-602931 FT

If the account number or report type cannot be found, open the report to try to find something that can be searched for in Maestro. If unable to find the information, email the PA for information.

After saving document upload to Maestro Deliverables section, explained in Section 4 a. Once uploaded and viewing email it is possible to choose the pdf. in the email and view the report.

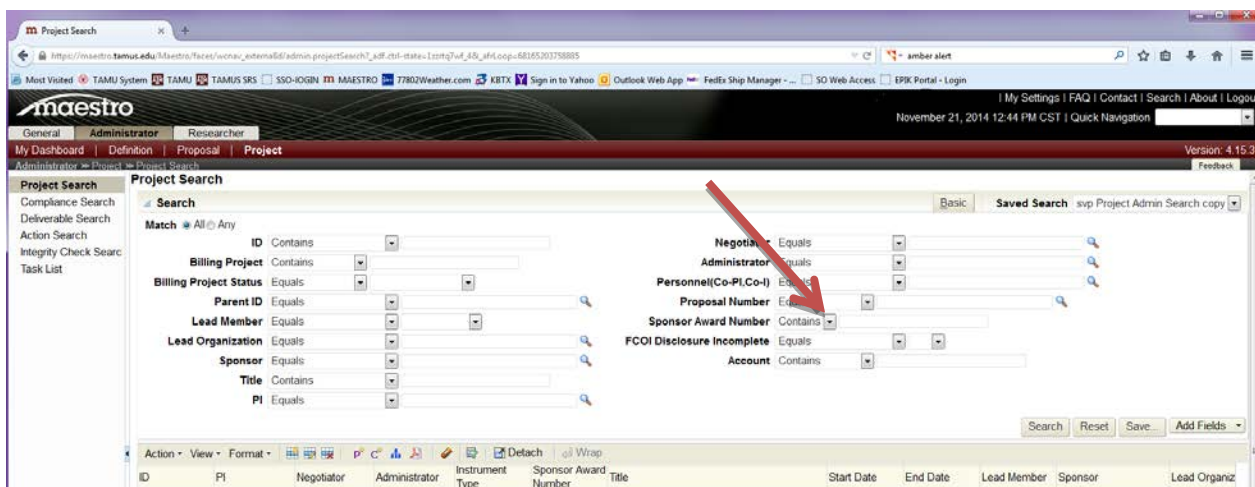
Below is an email without a report attached. The email is confirmation from the sponsor. Convert to PDF by choosing Adobe PDF as shown by arrow. After saving document, upload to Maestro deliverables section, explained in Section 4 a.



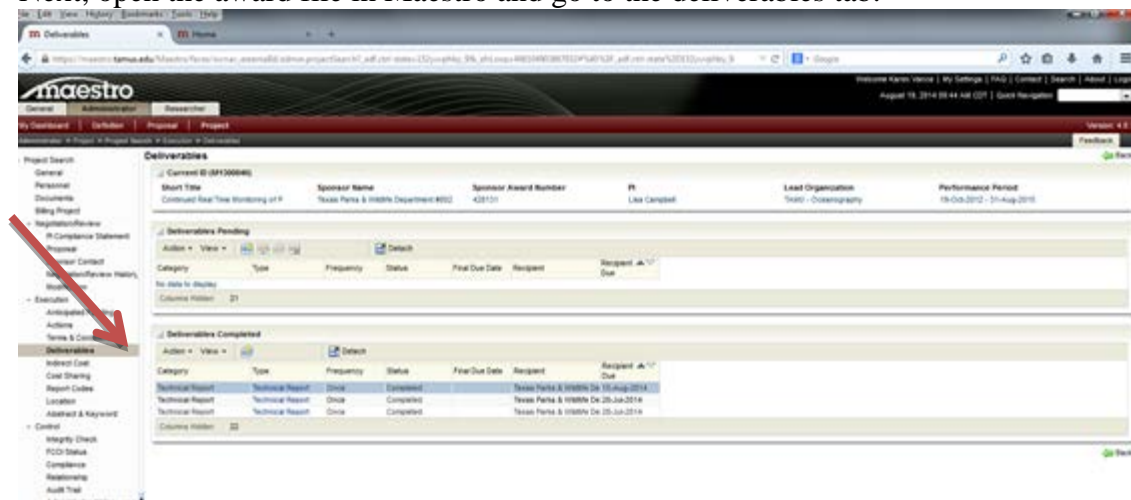
3. Uploading emails in Maestro.

Log in to Maestro. Choose Administrator tab then Project tab.

Next enter in the sponsor award number shown by arrow below, search and award should appear.



Next, open the award file in Maestro and go to the deliverables tab.



If there is an appropriate report already entered, select and upload document previously saved. Sometime the report will need to be created before uploading the document.

After document is uploaded save and then choose 'Completed' under the 'Status' in 'Deliverable Details' section. Save again.

The screenshot shows the 'Deliverable Details' page in the Maestro system. The page is divided into several sections. At the top, there's a header with 'maestro' logo and user information. Below that, a navigation sidebar on the left lists various options like 'Project Search', 'Personnel', 'Documents', etc. The main content area is titled 'Deliverable Details' and contains a form with the following fields: 'Current ID (01230004)', 'Short Title' (Continued Real Time Monitoring of P), 'Sponsor Name' (Texas Parks & Wildlife Department #502), 'Sponsor Award Number' (420131), 'PI' (Lisa Campbell), 'Lead Organization' (TAMU - Oceanography), and 'Performance Period' (19-Oct-2012 - 31-Aug-2015). Below these are sections for 'Deliverable Details' (Category: Technical Report, Type: Technical Report, Frequency: Once, Tracking: Required, Recipient Due Date: 15-Aug-2014, Recipient: Texas Parks & Wildlife Department #502, Description: Semi Annual Technical Report, Deliverable Elements, Notes) and 'Documents' (Action, View, Description, View Restriction, Created On, Created By, Updated On, Updated By). A red arrow points to the 'Status' dropdown menu, which is currently set to 'Completed'.

Notes:

AgriLife Extension or AgriLife Research emails, after being uploaded in Maestro, will be emailed to appropriate CGST personnel. The email/reports will then be scanned into LaserFiche. The email/report is then moved to the Uploaded subfolder.

Procedures for Master Agreements

(Master, Non-Disclosure, Memorandum of Understanding, etc. that does not include funding)

GCST searches Maestro to verify that a setup has not already been done for the Requested Master Agreement.

If a setup has not been done in Maestro CGST will need to enter in the required fields on the General Screen (those with an *), assign a number from the Master Agreement Log, enter the appropriate Negotiator, upload the original agreement and forward the setup to the appropriate negotiator.

If the agreement has been set-up and the request is an amendment, CGST will do a modification setup and forward to the appropriate negotiator.

When the setup has been returned to CGST, staff will verify that a Fully Executed Agreement has been uploaded into Maestro, and the Master Agreement has been emailed to the PI and file has been placed in file cabinet in CGST area.

Maestro Sponsor Set-up

TAMUS entities or personnel who request a new sponsor in Maestro need to fill out a Sponsor Input/Change Request.

THE TEXAS A&M UNIVERSITY SYSTEM Sponsor Input/Change Request

Sponsor Information			
*Name		World Organisation for Animal Health (OIE)	
*Parent Name (if one exists)			
*Sponsor Type	<input type="checkbox"/> Federal	<input type="checkbox"/> State <input type="checkbox"/> Agency <input type="checkbox"/> College/University	<input type="checkbox"/> Institutional
	<input type="checkbox"/> Municipality / Local Government <input type="checkbox"/> City Government <input type="checkbox"/> Districts, Authorities <input type="checkbox"/> Commissions <input type="checkbox"/> County Agencies	<input type="checkbox"/> Private <input type="checkbox"/> Fed Funded Res Org Non Profit <input type="checkbox"/> Foundation Non Profit <input type="checkbox"/> Research Org Non Profit <input type="checkbox"/> Professional Org Non Profit <input type="checkbox"/> University Non Profit <input type="checkbox"/> Individual <input type="checkbox"/> University Profit <input type="checkbox"/> Organization Profit	<input checked="" type="checkbox"/> Foreign <input type="checkbox"/> Government <input type="checkbox"/> University <input type="checkbox"/> Organization Profit <input checked="" type="checkbox"/> Organization Non Profit <input type="checkbox"/> Miscellaneous
*Sponsor State		*Texas Agency Number (if State is TX)	
Contact Name	Dr. Daniel Chaisemartin	Title	Head of Administration, Logistics and Publications Department
Email Address	d.chaisemartin@oie.int or oie@oie.int		
*Address	12, rue de Prony		
*City	Paris	*State / Province	
*ZIP / Postal Code	75017	*Country	France
Telephone	33(0) 1 44 15 18 88	FAX	
*DUNS Number		*TAX Number (do not enter SSN)	
Requestor Information			
*Requested By	Patt Junek	Date	11/18/14
Email Address	pjunek@tamus.edu	Telephone	979-845-8668

* Indicates a Required Field

Fill the form and email it to: maestrosponsor@tamus.edu . If Tax Number includes SSN do not enter Tax #, call Karen Vance at 979-847-7617.

Contracts & Grants Support Team (CGST) will confirm in Maestro that the requested sponsor is not already in Maestro and they will review and confirm the accuracy of the information on the form. Then CGST personnel will log into Maestro and create the new sponsor record.

CGST will add in the contact information if it is provided:

CGST will then add the sponsor's information to FAMIS on Screen 004:

1 - FAMIS (tammvs1.tamu.edu)

File Edit Transfer Fonts Options Tools View Window Help

S0013 Please enter desired modifications
 004 Sponsor Maintenance 11/20/14 08:46
 FY 2015 CC 02

Screen: Sponsor: 0008121

Sponsor Name: WORLD ORGANISATION FOR ANIMAL HEALTH (OI
 Sponsor Long Name: WORLD ORGANISATION FOR ANIMAL HEALTH (OIE)
 Sponsor Type: XO State Code: Tx State Agency Cd:
 Classification Levels:
 Fiscal-Year-End: 00 Maestro: 15511 World Organisation for Animal Healt
 Restrictions:

Inactive: _ by: Added by: CONA26P 11/10/2014

* ----- Contacts ----- *

Sel	Type	Name	Title	Phone	Ext.
** No contacts for this sponsor **					

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Hmenu Help EHelp Next Info

1 Sess-1 128.194.103.18 TAMT1841 4/12

If the new sponsor is funding an award for TEES, the sponsor must also be added into EPIK. The Maestro Sponsor will need to be populated in Maestro for 24 hours before it can be linked in EPIK.

Epik

Action Edit Block Field Record Query Window Help

TEES Information Systems

Sponsor Maintenance

Sponsor WOA Name World Organisation for Animal Health (OIE) CHANGE

Status Active Sponsor Class FR Foreign

Maestro Sponsor Type FR Foreign

Maestro Parent ID

Maestro Sponsor ID 15511 World Organisation for Animal Health (OIE)

State Agency Num University

Contact Daniel Chaisemartin E-Mail d.chaisemartin@oie.int

Title

Additional Contact E-Mail

Title

Default Address Type Sequence Num Tax Identification Number

Last Activity 20-NOV-2014 By Karen L. Vance

Sequence Num 1 Address Type SP Sponsor Address

Address 12, rue de Prony City Paris

State Zip Code 75017

County

Telephone Country Area Nation 52 France

Number Ext

CGST will then send an email back to the requestor with the Sponsor ID Number.

Advanced Proofing Guidelines

The screenshot shows the Maestro system interface. The top navigation bar includes 'General', 'Administrator', and 'Researcher' tabs. Below this is a sub-navigation bar with 'My Dashboard', 'Definition', 'Proposal', 'Project', and 'Project Reports'. The main content area is titled 'General Info' and contains various fields for project information. The 'Lead Organization' field is highlighted with a magnifying glass icon. The 'Administer for Org' field is also highlighted. The 'Function' field is set to 'Research'. The 'Sponsor Name' is 'National Science Foundation'. The 'Sponsor Award Number' is 'IOS-1354172'. The 'FAIN Number' is 'Federal / Federal'. The 'Prime Sponsor' is 'Prime Sponsor'. The 'Prime Award Number' is 'Prime Award Number'. The 'CFDA Number' is '47.074'. The 'Title' is 'LTREB: Social, Environmental, and Evolutionary Dynamics of Replicated Hybrid Zones in Swordtails (Teleostei: Xiphophorus) of Mexico's Sierra Madre Oriental'. The 'Short Title' is 'Short Title'. The 'Project Nickname' is 'Project Nickname'. The 'Start Date' is '01-Apr-2014'. The 'End Date' is '31-Mar-2019'. The 'Negotiation Required' is 'No'. The 'FCOI Required' is 'Yes'. The 'Funding Type' is 'Cost Reimbursable'. The 'Restricted Title' is 'Restricted Title'. The 'Restricted Sponsor' is 'Restricted Sponsor'. The 'Classified' is 'Classified'. The 'Cost Sharing Required' is 'Cost Sharing Required'. The 'Sub Recipient Exists' is 'Sub Recipient Exists'. The 'Project Status' is 'Project Status'. The 'Financial Status' is 'Financial Status'. The 'Negotiator' is 'Negotiator'. The 'Administrator' is 'Janelle Turner'.

Lead Organization

The Department that the PI submitted the proposal under and identifies the TAMUS Member. PIs can have multiple adlocs – check this. Click on magnifying glass and search for Lead Organization by entering your preferred search field (Abbreviation, Name, or Member), click Search then select appropriate Member/Department and click OK.

Administer for Org

Only used when Research Foundation is administering an award for a system member. This should represent the member and department.

Function

Pulled from the proposal and determined by the TAMUS Member. Most of the time this field will be Research. Ag Extension is always Function 20.

Sponsor

Entity providing funds to a TAMUS Member or the third party to any Award Type. Click on magnifying glass and search for Sponsor. Choose correct Sponsor for agreement and click OK. If the Sponsor cannot be found in Maestro please complete the Maestro – New Sponsor Input Request Form and email it to maestrosponsor@tamus.edu. If the Sponsor is a federal entity, CFDA number is required to be filled in.

Sponsor Award Number

The number that the *sponsors* signed to the grant, agreement or contract.

FAIN Number

Provided from sponsor for subaward purposes.

Prime - If we are a Subrecipient, complete this section using the magnifying glass to search for prime sponsor (original source of funds). CFDA number is required if the prime is a federal award. Choose appropriate CFDA code for sponsor if prime agreement is contract. See Maestro Subawards User Guide.

Prime Award Number –the number that is assigned to the Prime award

CFDA Number - Catalog of Federal Domestic Assistance (CFDA) (www.cfda.gov) assigned to all government Grants. The Federal government does not assign CFDA numbers to direct contracts (Prime or Sub). The TAMUS Members however wish to track all federal awards (Grants, Agreements and Contracts) by CFDA number. Check with the Member for specific CFDA assignment for federal direct contracts.

Title

The formal or long title of the Project

Start Date

Agreement Period of Performance Start Date

End Date

Agreement Period of Performance End Date

FCOI Disclosure Required

Checked by negotiator or project administrator if award is required to comply with TAMUS FCOI procedures

Funding Type

How funding is to be billed, i.e. Fixed Price, Cost Reimbursable or Mixed. Will be defaulted to Not Funded. Validate that it is not “not funded”.

Restricted Title

Click this box if we are prohibited from including title of TAMUS project reporting in statistics. Also, click this box if the scope of work or any of the data is considered to be confidential.

Subrecipient Exists

If there is a Subaward check this box.

Project Status

The status of the entire project, i.e. Active, Closed. Should be active.

Financial Status

The status of funding on the entire project.

Administrator

The current Project Administrator for this project. Ensure the correct PA is assigned.

Summary: Confirm all Data

The Summary tab on the general screen will provide an overview of project details. You will be shown:

Total Awarded Amount

Total Anticipated Amount

- Fully Executed- Yes/No
- Current Period Start Date
- Current Period End Date
- Integrity Check Status
- Compliance Completed-Yes/No
- Billing Projects
- List of all Modifications and their current status
- List of all Actions

Integrity Check:

The Integrity Check tab will allow you to see any items that the integrity check function has identified as errors or warnings. This is the same screen as you would bring up from the menu. Refer to the Integrity Check definition for further details. If an error is found send it back to the PA.

Personnel Screen

The screenshot shows the Maestro software interface. The top navigation bar includes 'General', 'Administrator', and 'Researcher'. The left sidebar lists various project management functions. The main content area is titled 'Personnel' and displays project information for 'Asphalt Research Consortium' (Sponsor: Western Research Institute, Award: TT1000, PI: Akram Abuodeh). Below this is a table of personnel.

PI Name	Member	Organization	Role	Credit (%)	Key Personnel	Investigator	Subject for FCOI	Begin Date	End Date	Notes	Detail
Dallas Little	TAMRF	TB	PI	100.00			Yes, by default, based on title	26-Dec-2006			
Total Credit (%)				100.00							

Member

Should match the system that the award was issued to.

Organization

Should match the department of the investigator. System member will show if administrator organization is Research Foundation.

Project Documents Screen

maestro

March 17, 2014 02:41 PM CDT

Version: 4.0.0

My Dashboard | Definition | Proposal | Project | Project Reports

Administrator > Project > Project Search > Documents

Current ID (M0700001)

Short Title	Sponsor Name	Sponsor Award Number	PI	Lead Organization	Performance Period
Asphalt Research Consortium	Western Research Institute	T1000	Dallas Little	TAMRP - TR	26-Dec-2006 - 30-Jun-2014

Fully Executed Documents

Action	View	Document	Document Type	Sponsor Document Identifier	Person	Updated On	Updated By	Description
No data to display.								

Columns Hidden: 3

Initial Award Related Documents

Action	View	Document	Document Type	Updated On	Updated By	Created On	View Restriction	Description
		95-476360-018_019_CA.pdf	Other	01-May-2013	Hodge Debra	01-May-2013	No Restriction	SPS Emailed - 018_019
		95-476360 - Routing - 018_019.pdf	Other	01-May-2013	Hodge Debra	01-May-2013	No Restriction	Routing & Distribution - 018_019
		95-476360-017 CA.pdf	Other	26-Apr-2013	Hodge Debra	26-Apr-2013	No Restriction	SPS Emailed - (017)
		95-476360 - Routing.pdf	Other	26-Apr-2013	Hodge Debra	26-Apr-2013	No Restriction	Routing & Distribution - (017)
		M0700001.pdf	Contract	17-Apr-2013	Aerovale Rosemarie	17-Apr-2013	No Restriction	FE Modification No 13

Columns Hidden: 1

Modification Related Documents

Action	View	Document	Document Type	View Restriction	Description
		Supplement	Contract	No Restriction	Supplement
		2 Continuation M0700001 Little Interim Funding 99-4762 Interim Funding	Contract	No Restriction	Interim Funding \$25,000 Proposal 12137

Columns Hidden: 4

Action Related Documents

Action	View	Document	Document Type	View Restriction	Description
No data to display.					

Columns Hidden: 4

Final Documents - This section is used only for the final fully executed documents including any modifications. Verify that the final document has all required signatures.

Initial Award Documents-This section will have all documents, correspondence and negotiator notes dealing with the initial execution of the main award.

*Note- any documents moved forward from the previous negotiator module will appear here by default.

Modification Related Documents—Any documents relating to a modification, such as the partially executed document awarding the mod or negotiator notes should be uploaded under each individual modification record. These documents will then pull into the main documents screen.

Action Related Documents- Any PA notes or documents, such as important emails, can be uploaded to the action they pertain to for backup. Any documents attached to an action will be pulled through to the main documents page.

Document Types That May Be Uploaded

Correspondence

(Includes email from sponsor/sub, email from PI, email from OTC, email from OGC). Upload as 1 pdf.

Approvals/Recommendations

- Department/College

- General Counsel
- System Member
- Sponsor
- Work Offsite
- Other

Modification Screen

The purpose of this screen is to enter and track Modifications for awards and subawards. The CGST or SMG will create the modification records and enter the Type and Description. Also, CGST or SMG will enter in any applicable Notes regarding this Modification and upload the associated documents into Modification Document. The CGST or SMG will then send a Task to the assigned negotiator or project administrator indicating a Modification is ready for their review.

The screenshot shows the Maestros Modification screen. The left sidebar contains navigation links: Project Search, General, Personnel, Documents, Billing Project, Negotiation/Review, PI Compliance Statement, Proposal, Sponsor Contact, Negotiation/Review History, Modification, Execution, Anticipated Funding, Actions, Terms & Conditions, Deliverables, and Indirect Cost. The main content area displays the 'Modification' screen for Current ID (M0700001). It includes fields for Short Title (Asphalt Research Consortium), Sponsor Name (Western Research Institute), Sponsor Award Number (TT1000), PI (Dallas Little), Lead Organization (TAMRF - TX), and Performance Period (26-Dec-2009 - 30-Jun-2014). Below these fields is a table of modifications:

Seq.	Type	Description	Sponsor Award Number	Status	Proposal	Sponsor
1	Supplement	Supplement - for \$ 1,320,1620	DTFH61-07-41-00009	Agreement Logged		Western Research Institute
2	Continuation	Interim Funding for \$25,000 PI		Fully Executed		Western Research Institute
3	Continuation	Int	TT1000	Agreement Logged		Western Research Institute

Columns Hidden: 4

The screenshot shows the Maestros Modification Detail screen. The left sidebar is the same as the previous screenshot. The main content area displays the 'Modification Detail' screen for Current ID (M0700001). It includes fields for Short Title (Asphalt Research Consortium), Sponsor Name (Western Research Institute), Sponsor Award Number (TT1000), PI (Dallas Little), Lead Organization (TAMRF - TX), and Performance Period (26-Dec-2009 - 30-Jun-2014). Below these fields is a form for entering modification details:

Seq. 3
 Type: Continuation
 Description: Int
 Sponsor: Western Research Institute
 Sponsor Award Number: TT1000
 Proposal: [Search]
 Notify PI: ☐
 Negotiation Required: ☐
 Notes: [Text Area]

Below the form is the 'Modification History' table:

Action	Date	Comment
Fully Executed	18-Mar-2014 14:48:58	
Agreement Logged	18-Mar-2014 14:31:57	

Columns Hidden: 4

Below the history is the 'Documents' section:

Document	Document Type	Description	Updated By	View Restriction	Final
No data to display.					

Columns Hidden: 5

The Negotiator or Project Administrator will enter the Sponsor Award Number, Proposal, and check the box if the PI needs to be notified.

Seq

The number of the modification in chronological sequence as entered into Maestros.

Type

The type of Modification:

Supplement - Additional funds without change in period of performance.

Continuation - Modification to add more time and money. A project approved for multiple-year funding with funds committed one year at a time.

Extension - Additional period of time given to complete the work (no additional funds).

Reduction - Decrease in the amount funded.

Release of Funds - Modification to authorize expenditure of previously obligated funds.

Revision - Changes terms and conditions (scope of work, PI, CO changes, etc.).

Description

The Sponsor's specific reference name for the modification, i.e. the Amendment number (however, not necessarily in the same chronologic order as the Seq).

Sponsor Award Number

The Sponsor's award number. If the Sponsor Award number changes from the original award number enter the new number here. Do not change the award number on the General Screen.

Proposal

If a proposal was done for that specific modification, it can be connected here.

Terms and Conditions

When initially setting up the project, the terms and conditions should be established. Terms and conditions can be added by using a template, a project with T&C previously established or by individually choosing T&C from selections. New terms and conditions can be added or updated as needed for project. Templates can be updated by a designated Template Administrator.

maestro

TEST Login: Test User, CB, T1000

Welcome Janelle Turner | My Settings | FAQ | Contact | Search | About | Logout

March 24, 2014 11:39 AM CDT

Version: 4.0.0

General Administrator Researcher

My Dashboard | Definition | Proposal | Project | Project Reports

Administrator > Project > Project Search > Execution > Terms & Conditions

Back Save Cancel

Feedback

Current ID (M1401598)

Short Title: LTRCD: Social, Environmental, and Evolut

Sponsor Name: National Science Foundation

Sponsor Award Number: 123-1234172

PI: GR Rosenthal

Lead Organization: TAMU - Biology

Performance Period: 01-Apr-2014 - 31-Mar-2019

Terms And Conditions

Action View Format

Category Item Value Comment

Purchasing

Purchasing Business Requirement

Equipment / Property

Budget Restrictions/Reallocations

Budget Other

Travel

Publication/Presentation

Intellectual Property

Export Control

Confidential, Proprietary Information

Regulations

Subaward/Consultant

Miscellaneous

Columns Hidden: 4

Terms and Conditions

This section is used to define the terms and conditions that apply to the project. Only Items with a Value selected will appear on the SPS. Check that these are correct and that the correct template was used. Be sure Terms and Conditions are marked on SPS.

Action Button

Gives the three options to create Terms and Conditions. Also, there are buttons on the section header that correspond to the Action button options.

Deliverables

The project deliverables screen was designed to track all project obligations. The PA will set all known technical and financial deliverables at the beginning of the project. The system will track if obligations have been met and send reminders to PI's/Assistants about upcoming deliverables that are due.

Deliverables

Current ID (M1401598)

Short Title	Sponsor Name	Sponsor Award Number	PI	Lead Organization	Performance Period
LTREB: Social, Environmental, and Evolut	National Science Foundation	IOS-1354172	Gil Rosenthal	TAMU - Biology	01-Apr-2014 - 31-Mar-2019

Deliverables Pending

Category	Type	Frequency	Status	Final Due Date	Recipient	Recipient Due
Technical Report	Technical Report	Annual	Pending	01-Feb-2019	National Science Foundat	01-Feb-2015
Financial Report	Final Invoice	Final	Pending		National Science Foundat	30-Jun-2019

Deliverables Completed

No data to display.

Category

This box will be auto-populated based on Deliverables Category.

Type

Use the search function to define what type of deliverable is required.

Frequency

How often will this report be due: Once, Monthly, Quarterly, Semi-Annual, Annual or Final.

Tracking

This field is required to drive tracking statuses, notifications and late reminders.

- Required-Status updates are required and notifications will be sent. Late Notices will go out if not completed by the specified number of days. An entry will appear in the worklist of the Responsible Person and Secondary Assistant 15 days prior to the required deadline.
- PA Tracking- No notifications will be sent but the Status is required to be changed to complete.
- Notification Only- No late reminders will be sent and no status is required to be set to complete.

Recipient Due Date

When is this deliverable due.

Recipient

Sponsor will be entered by default but this field can be changed to reflect who will be receiving the deliverable.

Responsible Person

The person that is responsible for completing the report. By default this will be the PI but another person may be chosen with the search function. This person will receive all notifications.

Secondary Assistant

If someone else needs to be notified or will be submitting the deliverable, specify them here. If the PI has specified a delegate, they will be auto-populated.

Reminder

These three numbers represent the number of days before the due date that the PI and Secondary Assistant will be notified. If left blank, no notifications will be sent. If the frequency is set to final, then the three fields will auto-populate with 30-60-90 days.

Late Reminders

These three numbers represent the number of day after the due date that notices will be sent. At each level, a higher authority is added. This is not auto populated.

Extension Pending

When checked, notifications will go out with a disclaimer that an extension is pending.

Auto Create New Iteration

If marked yes, once an iteration due date has passed then a new one will be scheduled. This will continue until the Final Due Date is reached.

Final Due Date

Used in combination with the Auto Create New Iteration feature, the final date will discontinue iteration creation. If an extension is processed, the final date will be updated.

Received Date

The date a specific deliverable was received.

Sent to Sponsor

The date the deliverable was sent to the sponsor.

Status

Status shows at what stage the deliverable is in.

- Pending- At 6 months prior to the due date, the status will automatically be changed to pending.
- In Construction

- Complete- Once the deliverable is submitted, the status has to be manually updated by the PI or PA.
- Notified- If only a notification is required, the status will change when the notification is sent.

Description

Short description of deliverable.

Deliverable Elements

Any elements that need to be included in the deliverable. If this should be included with each iteration, then check box “Include In New Iteration”. This will be included in the notification sent to PI.

Notes

Internal notes only. Will not be sent in notification. If this should be included with each iteration, then check box Include In New Iteration.

Documents

Deliverables can be uploaded here.

Reporting Codes – Verify codes are filled in.

Reporting codes are used for TAMU System Members’ reporting purposes, such as for the Texas Coordinating Board Report and NSF Reports. If the record was created from the proposal, then these codes will be automatically filled. If not, then the PI should provide the correct information for the project administrator to complete this page.

The screenshot shows the 'maestro' Project Reporting Code form. The top navigation bar includes links for Dashboard, Definition, Proposal, Negotiation, Project, and Project Reports. The left sidebar lists various project management tasks. The main form area contains the following sections:

- Project Reporting Code**: A header section with a 'Current ID (M1000067)'.
- Project Details**: A table with columns for Short Title, Sponsor Name, Sponsor Award Number, PI, Lead Organization, and Performance Period.
- NSF & THECB Codes**: A section with dropdown menus for Activity, NSF Science and Engineering Field, THECB Science and Engineering Field, THECB Character of Work, THECB Selection Process, and NSF Category.
- THECB Special Areas Of Interest**: A section with a dropdown menu for Code and a text input for Description.
- Reporting Codes**: A table with columns for Code, Description, and a dropdown menu.

Integrity Check

The Integrity Check screen will allow the Negotiator or Project Administrator to identify certain problem areas of the project and will automatically run on a nightly basis. These will be classified as Errors, which need actions taken immediately to correct, or Warnings, where there are potential problems. Once the problem is corrected, the error is marked as Resolved. If the problem has only been temporarily resolved or deemed unimportant, a Resolved Until date can be added which will prompt the error to show again at said date.

Currently the Integrity Check will be controlled by the following table:

Integrity Check

Current ID (M1401459)

Short Title: Identifying Risks for Pathogen Contamina

Sponsor Name: Texas Vegetable Association

Sponsor Award Number:

PI: Alejandro Castillo

Integrity Check

Type	Description	Status	Resolve Until	Notes	Created On
	Billing project 504833 has not been transferred to FA	Warning			17-Mar-2014
Research Compliance expired/missing	Human Subjects authorization does not exist/pending	Error			17-Mar-2014
Research Compliance expired/missing	Biohazards authorization does not exist/pending	Error			17-Mar-2014
Indirect Cost End date	The latest indirect cost end date does not match the	Warning			17-Mar-2014
Indirect Cost Start date	The earliest indirect cost start date does not match the	Warning			17-Mar-2014

Columns Hidden: 3

CHECK	Severity	Description
Active sponsor	Warning	if sponsor on project, modification in negotiation, not completed action, is active
Negotiation/review status missing	Warning	for fully executed only, if all required statuses have been met
LEAD org – PI’s organization don’t match	Warning	
Inactive personnel	Warning	check status in BPP
Inactive responsible person,	Warning	check status in BPP for responsible person and secondary assistance in scheduled deliverables
Compliance statement	Warning	check if PI completed Compliance statement when needed
Account in deficit	Warning	Direct balance is in deficit
Research Compliance expired/missing	Error	
FCOI	Error	Not all investigator disclosed their FCOI
Late deliverable	Warning	
Funding period dates	Warning	Minimum start date and maximum end date doesn’t match project start/end date
IDC start / date	Warning	Minimum start date and maximum end date doesn’t match project start/end date
Cost sharing is not set	Warning	Cost sharing Required is set to Y, but no cost sharing info was entered for a project
Account does not exist	Warning	Account entered under Billing project is not setup in financial system.
Billing project waiting for a transfer	Warning	Not all billing projects are sent to FAMIS

The Integrity Check function can be run at any time and should be run at the conclusion of any award action. The list can be exported to Excel as needed. Until the automated alerts are designed, the PA should run their integrity check search to obtain the list of pending issues.

FCOI Status Screen

maestro March 24, 2014

General Administrator Researcher

My Dashboard Definition Proposal Project Project Reports

Administrator Project Project Search Control FCOI Status

Project Search
General
Personnel
Documents
Billing Project
Negotiation/Review
PI Compliance Statement
Proposal
Sponsor Contact
Negotiation/Review Hist
Modification
Execution
Anticipated Funding
Actions
Terms & Conditions
Deliverables
Indirect Cost
Cost Sharing
Report Codes
Location
Abstract & Keyword
Control
Integrity Check
FCOI Status
Compliance
Relationship
Audit Trail

FCOI Status

Current ID (M1401598)

Short Title	Sponsor Name	Sponsor Award Number	PI	Lead Organization	Performance Period
LTREB: Social, Environmental, and Evolut	Radian Corporation	IOS-1354172	GI Rosenthal	TAMU - Biology	01-Apr-2014 - 31-Mar-2019

FCOI Status

Action View Detach

Investigator	Training	Annual	Investigator's Disclosure	Need COI Review	Review Status	COI's Decision
GI Rosenthal	Completed	Yes		No		

Columns Hidden 4

COI Official

Action View Detach

Member	COI	Email Address	Work Phone
TAMU	Carol Cantrell	c-cantrell@tamu.edu	9798621478
TAMU	Lesa Feldhausen	lfeldhausen@tamu.edu	9798627986

This screen shows the FCOI status of all of the investigators on the FCOI List of Investigators. The list of investigators should be added/corrected on the Personnel screen in order for them to show here. It shows whether the investigator has completed their TrainTraq course and disclosure form, if a significant financial interest (SFI), and if it is manageable. See the SRS FCOI Policy for more details.

The screen also indicates who the System Member FCOI official is in case there are any questions. You can highlight the individual in question and notify the COI automatically that an action is needed.

SPS Report

The Sponsored Project Summary will now be available at any time and anyone with access will be able to view. The SPS will cover the following areas:

- General Award Information
- Administrative Organization
- Investigators
- Actions
- Indirect Costs
- Cost Sharing
- Subrecipients
- Deliverables
- Compliances
- Terms and Conditions
- Reporting Codes
- Active Account Numbers

Maestro

Compare Contract and SPS report to data entered in Maestro in the following areas:

General Award Information

PI / Lead Organization / Function / Instrument Type/ CFDA# /Title & Dates (s/b same as contract)

Personnel

PI Name + Member + Organization should match with the General Info screen / If PI Credit by % is not filled pull up the proposal then enter the information from the Personnel screen, or return to the PA to complete.

Active Account Numbers

New Billing Project# 0s to back for 06 projects / Sponsor Name / Dates same as General screen / Billing Project Accounts in Maestro should correspond with the Support Accounts in Famis Proposal

All new projects should have a proposal. Modifications with additional funds may require calculations if over 25% from the original amount return to the PA for review and/or to request for a new proposal.

IDC Action

Check Rate / Frequency / Level / Calculate amount for accuracy - only applies if it's obvious.

Tasks

In Modifications - when a completed task is sent to a Negotiator make sure the Negotiation Box is marked.

FAMIS

SPR:

111 Project General Information - Page 1 10/29/14 15:11
FY 2015 CC 06

Screen: Project: 5049870000

Title: USDA SANITARY AND PHYTOSANITARY STANDARDS SPS: Y
Long Title: USDA SANITARY AND PHYTOSANITARY STANDARDS COURSE CONVERSION

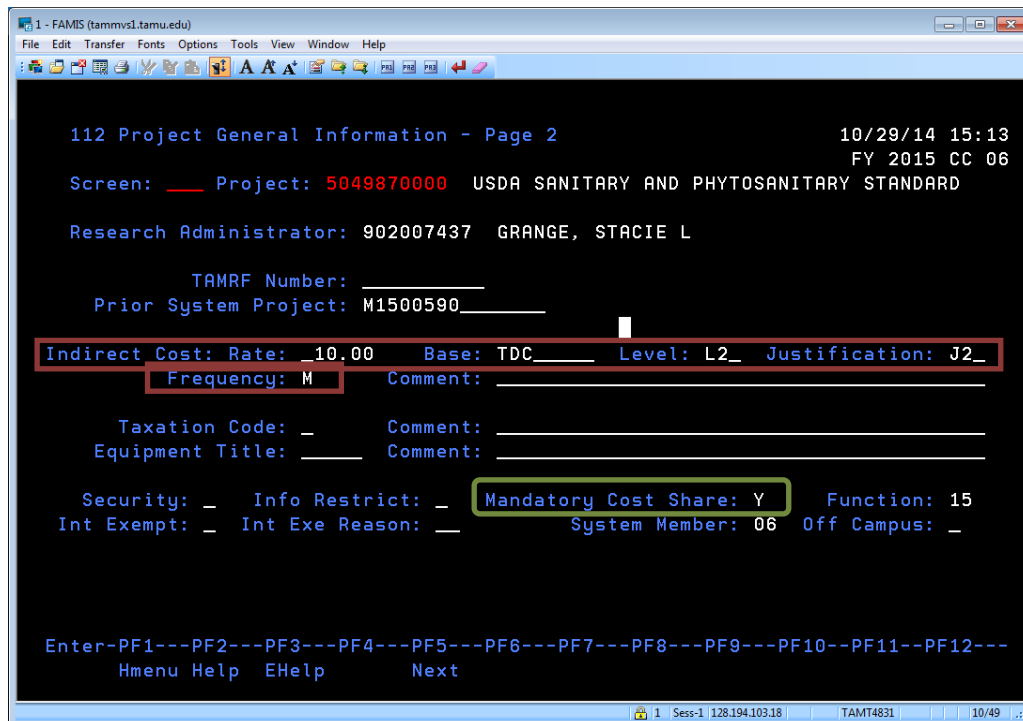
Sponsor: 0000983 USDA-FOREIGN AGRICULTURAL SERVICE
Sponsor Award Nbr.: AG 7000 P 14 0007 Competitive Seg:
Status: A

Number of Awards: Begin Date: 09/30/2014
Total Awards Amt: 9957.00 End Date: 12/31/2014

Project Type: S Parent Project:
Instrument Type: C Instrument Sub-Type: P0
Funding Type: F
CFDA Code: 10.962 NSF Category: USDA
Fed Flow Sponsor:

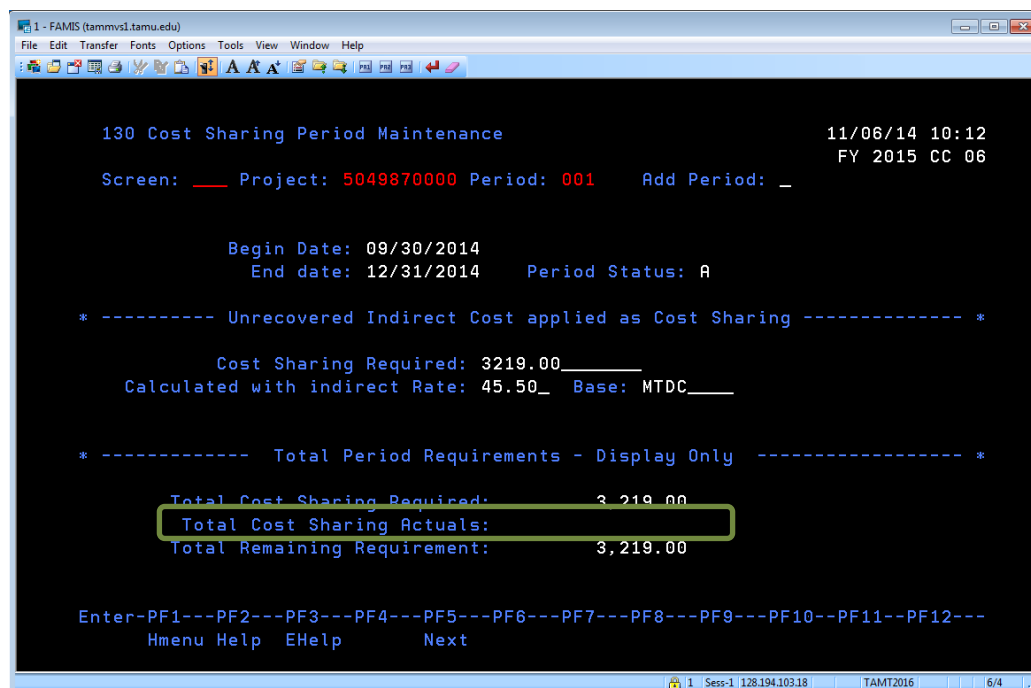
Entered Date: 10/27/2014
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp Next Title

Check #111: Long Title / Sponsor & Award Number#/ Status/ Total Awards Amt / Dates/ Instrument Type / CFDA



112 Project General Information - Page 2 10/29/14 15:13
FY 2015 CC 06
Screen: ____ Project: 5049870000 USDA SANITARY AND PHYTOSANITARY STANDARD
Research Administrator: 902007437 GRANGE, STACIE L
TAMRF Number: _____
Prior System Project: M1500590 _____
Indirect Cost: Rate: 10.00 Base: TDC____ Level: L2_ Justification: J2_
Frequency: M Comment: _____
Taxation Code: _ Comment: _____
Equipment Title: _____ Comment: _____
Security: _ Info Restrict: _ Mandatory Cost Share: Y Function: 15
Int Exempt: _ Int Exe Reason: _ System Member: 06 Off Campus: _
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp Next

Check #112: Base: TDC or MTDC / Level: (L3 is only for 0%) / Frequency: (N only for 0%) /
*Mandatory Cost Share if set to Y - (see next page) / Function and System Member: Function 15
= 06 Ag Research / Function 20 = 07 Ag Extension)



130 Cost Sharing Period Maintenance 11/06/14 10:12
FY 2015 CC 06
Screen: ____ Project: 5049870000 Period: 001 Add Period: _
Begin Date: 09/30/2014
End date: 12/31/2014 Period Status: A
* ----- Unrecovered Indirect Cost applied as Cost Sharing ----- *
Cost Sharing Required: 3219.00____
Calculated with indirect Rate: 45.50_ Base: MTDC____
* ----- Total Period Requirements - Display Only ----- *
Total Cost Sharing Required: 3,219.00
Total Cost Sharing Actuals: 3,219.00
Total Remaining Requirement: 3,219.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp Next

Cost Sharing Screen 130: When screen 112 is set to a “Y” for Mandatory Cost Sharing the PA will complete the C/S screen in Maestro then screen 130 will populate overnight into FAMIS, as shown above. Also when an No Cost Extension has been approved the PA will update the end date in Maestro for cost sharing and will continue with each NCE until the Total Cost Sharing Actual has been met.

FRS:

F0013 Please enter desired modifications
 006 SL 6 Digit Account (FSA) 10/29/14 15:38
 FY 2015 CC 06
 Screen: Account: 504987 USDA SANITARY AND PHYOSANITARY
 Panel: 01 More >>
 Account Title: USDA SANITARY AND PHYOSANITARY SA create enable: Y SRS: Y
 Resp Person: 904009009 KORICH JODI A Old Acct:
 ABR Rule: 010 Map Code: 50000 Reporting Group: RF
 Bottom Line Chrt: Y Derlt Cat Chrt: N Derlt Cat Tot Pct:
 AFR Fund Group: 40 Fund Group: RS Sub Fund Group: Sub-Sub:
 Year-End Process: P Year-End Acct: Function: 15 Sub-Fun:
 Default Bank: 08063 Override: Y Proj FYID End No: 08 Aux Code:
 Alternate Banks: 04622 08855 02753 Security:
 P-Card Bank: State Funds: Appropriated: --SA Transactions--
 CC Dept S-Dept Exec Div Coll Mail Cd Stmt Budget Actual
 Primary: VTAN DV VM VM C4458 Y Expense: Y Y
 Secondary: Revenue: N N
 Admn for: Center: TRS/ORP Exempt: -
 Fund Source: 07 Account Letter: -
 Long Title: USDA SANITARY AND PHYOSANITARY STANDARDS Setup Dt: 10/27/2014
 COURSE CONVERSION Iteration Dt: 10/27/2014
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Hmenu Help EHelp Next CAcct CProj AResp Cmmt Left Right

Review 006: ABR Rules should not use 001 for Federals / Map Code & Reporting Group – (example for Research & Extension Accounts: Map Code: 5000 = Federal & Reporting Group =RF - Map Code: 40050 = Non-Fed & Reporting Group = RN) / Function / Primary Dept / Long Title (fix the title when needed)

F0013 Please enter desired modifications
 008 SL Attributes 2 10/29/14 15:40
 FY 2015 CC 06
 Screen: Account: 504987 USDA SANITARY AND PHYOSANITARY SRS: Y
 Element of Cost: Sub-El: Foreign Tvl: 1 Gen Exp Bud: -
 Effort Category: DRES Foreign Per: Admin/Clerical: -
 Salary Sav. Dist: Rev Pledged: Restricted: -
 Fac Salary Sav. Dist: Pysl Rest Anal: Sels Type: -
 Fac Savings Form 500: Int Exempt: Int Exe Reason: -
 Grad Savings Form 500: Interest Acct: -
 ETravel Fee: --- Subcode Edits ---
 USAS Cd: Obj Trans Low High Match
 Bond Issue: Cat Type 8000 8999 N
 Budget Sort: Cost Ref 1: - -
 Gift Exp Exempt: Cost Ref 2: - -
 A/R Clerk Cd: 1C Cap. Campaign: -
 GCP/Constr.Proj: -
 Accountant Resp: 902007437 GRANGE, STACIE L
 Title to Equip: -
 Comments: -
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Hmenu Help EHelp Next CAcct Cmmt

Review 008: Effort Category: DRES = 06 & DOSA = 07 / Interest Acct (sometimes entered on screen 52 instead - see page 11) / AR Clerk CD / Title to Equip must be noted (example: No Equip Budgeted or Vests with Member, or Sponsor) / Subcode Edits: in this case when code 8000 – 8999 is mark with an N

– this means no equipment was included in the budget (see next print)

034 SL Summary By Budget Pool 11/12/14 12:17
 USDA SANITARY AND PHYOSANITARY FY 2015 CC 06
 Screen: Account: 504987 Fiscal Year: 2015
 Thru Month: 11 November FY/PY/IN to Date: FY Calc CM IDC: N
 Resp Person: KORICH, JODI A Bottom Line Exclusion: 0.00
 Department: VTAN Flags: D F B C Z G ABR Net Dir BBA: 6171.93
 Map Code: 50000 N N Y N N 010 Unprotected Available: 6171.93

Obj	Description	Budget	Actual	Encumbrances	Available
0001	Revenue Pool	9975-			9975-
****	Total Revenue	9975-			9975-
1000	All Expense Pool				
1101	Salaries & Wages Poo	3740		2430	1310
1900	Benefits Pool	1070		468	604
3000	Travel Pool				
4000	Supplies Pool				
5000	Other Expense Pool	1250			1250
8000	Capital Outlay Pool				
***	Total Direct Expense	9068		2896	6172
*	Partial Acct Total	907-	0	2896	3803-

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Hmenu Help EHelp Left Right

Review 034: Object Code 8000 - Capital Outlay Pool should not have a dollar amount if Edits Low & High is marked with an N

F0013 Please enter desired modifications 10/29/14 15:09
 009 SL Grant/Contract Attributes FY 2015 CC 06
 Screen: Account: 504987 USDA SANITARY AND PHYOSANITARY SRS: Y

Sponsored Project: 5049870000 USDA SANITARY AND PHYOSANITARY
 Sponsor: 0000983 USDA-FOREIGN AGRICULTURAL SERVI
 Award Nbr: AG-7D09-P-14-0037 Total Awarded 9957.00
 90 Day Pre: Billing Revenue Object: 0250 Funding
 Start Date: 09/30/2014 Indirect Expense Object: 9610
 End Date: 12/31/2014 Indirect Revenue Object: 0320

TAMRF Acct/Proj Nbr: System Member: 06
 CS Acct Link: TE Certify: Y E-Verify:
 Indirect Cost Base: 1: 904009009 KORICH, JODI A
 Rate: 2:
 Distribution: 3:
 CFDA Nbr: 10.962 NSF Category: USDA 4:
 Activity: 1A
 Science/Engineering Field: 2N Special Areas of Interest
 Character of Work: 4C
 Selection Process: 5B

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Hmenu Help EHelp Next CProj AResp

Review 009: Total Awarded should match SPS & SPR & Screen 34/ Object codes: 0250 = Federal only and 0255 = Non-Federal accounts / TE Certify set to Y for all Federal & State

Award w/A-21 obligations (If multiple support accounts are needed the PA will enter the IDC information on screen 52 and mark the TE Certify separately --- (PAs are not always consistent on what screen the information is entered)

034 SL Summary By Budget Pool 11/13/14 12:31
 USDA SANITARY AND PHYOSANITARY FY 2015 CC 06
 Screen: Account: 504987 Fiscal Year: 2015
 Thru Month: 11 November FY/PY/IN to Date: IN Calc CM IDC: N
 Resp Person: KORICH, JODI A Bottom Line Exclusion: 0.00
 Department: VTAN Flags: D F B C Z G ABR Net Dir BBA: 6171.93
 Map Code: 50000 N N Y N N 010 Unprotected Available: 6171.93

Obj	Description	Budget	Actual	Encumbrances	Available
0001	Revenue Pool	9975-			9975-
****	Total Revenue	9975-			9975-
1000	All Expense Pool				
1101	Salaries & Wages Poo	3740		2430	1310
1900	Benefits Pool	1070		466	604
3000	Travel Pool				
4000	Supplies Pool				
5000	Other Expense Pool	4258			4258
8000	Capital Outlay Pool				
***	Total Direct Expense	9068		2896	6172
	* Partial Acct Total	907-	0	2896	3803-

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Hmenu Help EHelp Left Right

Change FY/PY/IN to Date: from FY to IN and hit Enter - now compare 0001 Revenue Pool amount to the Total Awarded on screen 9 and screen 111 in SPR - totals should all match.

F0013 Please enter desired modifications 10/29/14 15:34
 051 Support Account Attributes FY 2015 CC 06
 Screen: Account: 504987 93530 USDA SANITARY AND PHYOSANITARY SRS: Y

Account Title: USDA SANITARY AND PHYOSANITARY Security: _____
 Resp Person: 904009009 KORICH, JODI A SA Group: _____
 Bot Ln Cntl: Y Deflt Cat Cntl: R Deflt Cat Tol Pct: _____
 Default Bank: 08063 Override: Y Delg Type: _____ Old Acct: _____
 Alt. Banks: 04622 08855 02753 _____ Roll BBA To Base: _____
 P-Card Bank: _____ SL Function: 15 SA Function: 15 Effort Cat: DRES_

CC Dept S-Dept Exec Div Coll Mail Cd Stmt
 Primary: VTAN DV VM VM C4458 Y Sys Member: 06
 Secondary: _____ Off Campus: _____
 Admin For: _____ Indirect Cost: _____
 Center: _____ Base: TDC
 90 Day Pre: _____ Classing Cd: _____ USAS Cd: _____ Rate: 10.00
 Start Date: 09/30/2014 TAMRF Nbr: _____ Distribution: FEDERAL
 End Date: 12/31/2014 CS Acct Link: _____ Expense Obj: 9630
 Long Title: COMPLETION OF DATA ANALYS AND REPORTS RE Revenue Obj: 0320

*** All fields entered on this screen override fields on the Parent SL ***
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Hmenu Help EHelp

Review 51: Depts / IDC Info / Start & End dates / Long title - (Note: the long title is missing some information, also notice the Expense Obj Code: 9630 is different from screen 9 –in this

case only one S/A was added therefor codes should be the same. This is a Federal project and 9610 is the correct code. Notify PA to fix.

F0013 Please enter desired modifications
052 Support Account Attributes 2 10/30/14 12:03
FY 2015 CC 06

Screen: Account: 504987 93530 USDA SANITARY AND PHYTOSANITARY
SRS: Y

Accountant Resp: 902007437 GRANGE, STACIE L Funding:
Foreign Per: Admin/Clerical:
Pysl Acct Anal: TE Certify:
Int Exempt: Int Exe Reason:
Interest Acct: 203120 00000
Travel Fee:

--- Subcode Edits ---		
Low	High	Match
8000	8999	N

----- Responsible Persons -----
1: 904009009 KORICH, JODI A
2:
3:
4:

*** All fields entered on this screen override fields on the Parent SL ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp AResp

Review 52: Some of the same info from screen 8 and 9 can be entered on screen 52; for example if the Interest Acct info is missing on screen 8 - check screen 52. Same applies to SubCode Edits and TE Certify from screen 9. Some PAs will enter the information in both screens.... FYI: PAs are not always consistent if only one S/A was setup then screen 8 is acceptable, but if more than one S/A is added then screen 52 should be updated for each. Also note: equipment is exempt from IDC and should not be coded as 8000-8999 if under \$5000.

034 SL Summary By Budget Pool 10/29/14 18:09
USDA SANITARY AND PHYOSANITARY FY 2015 CC 06

Screen: Account: 504987 Fiscal Year: 2015
Thru Month: 10 October FY/PY/IN to Date: FY Calc CM IDC: N

Resp Person: KORICH, JODI A Bottom Line Exclusion: 0.00
Department: VTAN Flags: D F B C Z G ABR Net Dir BBA: 9068.00
Map Code: 50000 N N Y N N 010 Unprotected Available: 9068.00

Obj	Description	Budget	Actual	Encumbrances	Available
0001	Revenue Pool	9975-			9975-
****	Total Revenue	9975-			9975-
1000	All Expense Pool				
1101	Salaries & Wages Poo	3740			3740
1900	Benefits Pool	1070			1070
3000	Travel Pool				
4000	Supplies Pool				
5000	Other Expense Pool	4258			4258
8000	Capital Outlay Pool				
***	Total Direct Expense	9068			9068
*	Partial Acct Total	907-	0	0	907-

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp Left Right

Screen 34 Print #1 & 2 - check that the Revenue dollars were added in screen 34. If not, notify the PA --- this only happens when the PA enters the account number + the S/A on screen 10B. The revenue dollar amount is dropped and so a separate entry is required. Hit enter to view the bottom of the screen.

034 SL Summary By Budget Pool 10/30/14 09:56
 USDA SANITARY AND PHYOSANITARY FY 2015 CC 06
 Screen: Account: 504987 Fiscal Year: 2015
 Thru Month: 10 October FY/PY/IN to Date: IN Calc CM IDC: N
 Resp Person: KORICH, JODI A Bottom Line Exclusion: 0.00
 Department: VTAN Flags: D F B C Z G ABR Net Dir BBA: 9068.00
 Map Code: 50000 N N Y N N 010 Unprotected Available: 9068.00

Obj	Description	Budget	Actual	Encumbrances	Available
9600	Indirect Cost Pool	907			907
****	Total Expenses	9975			9975

* Account Total 0 0 0 0
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
 Amend Help Exit Left Right

Screen 34 Print #2 – Hit Enter from screen 34 to bring up this page: After the budget has been entered for a **NEW SETUP** this screen should always show 0 (zeros) straight across the bottom for Account Total (as seen above) – if you see a \$ amount under the Budget column or PF6 it could mean the PA did not load the budget correctly. Request the PA to review the account for verification.

Remember:

Modifications

No proposal is required if supplement does not change scope of work, does not change period of performance, and adds less than 25% of total award within an Action.

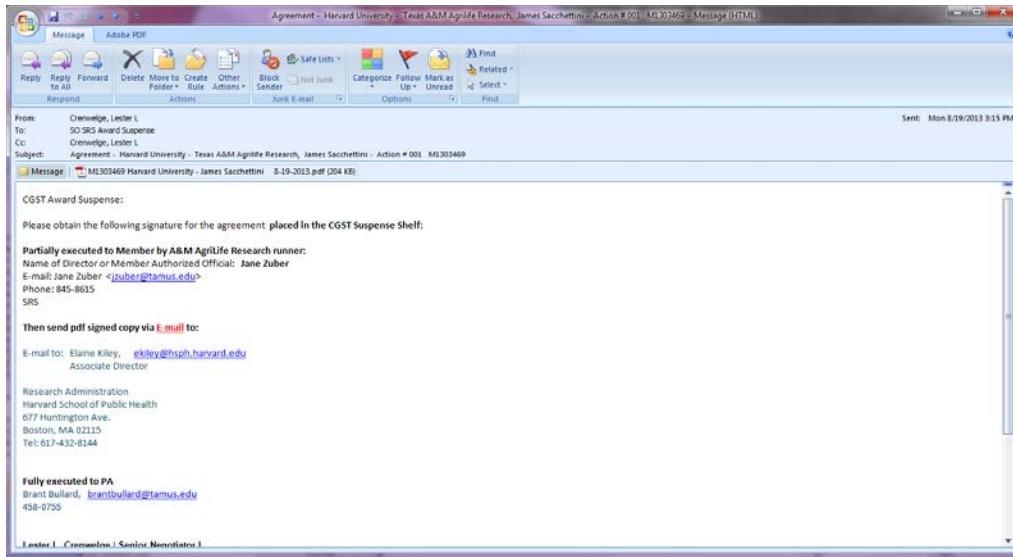
Extension of Time

Updates several areas in Maestro and FAMIS:

- Maestro: General Screen – Billing Project - Action – IDC - Cost Sharing (if required)
- FAMIS: SPR screen 111 - FRS: screens 9 + 51 (when multiply support accounts are setup based on dates)

Signature and Suspense Procedures

1. CGST will receive a request from a Contract Negotiator or a Project Administrator like the sample below in the Award Suspense Box.



1. CGST will record the partially executed document onto spreadsheet.
 - a. Computer
 - b. (K:) Drive
 - c. Contracts & Grants
 - d. Contracts & Grants Support Team
 - e. Signature & Suspense Information
 - f. Suspense Reporting
2. CGST will maintain a weekly status check on all existing pending documents.
 - a. If submitted via Standard Mail, FedEx or UPS a call is made to check on partially executed document.
 - b. If submitted via electronically then an email is sent to the Sponsor for an update of status.
 - c. Once the fully executed document is returned by the Sponsor CGST will mark it completed in the spreadsheet.
 - d. Fully executed document then gets uploaded in MAESTRO in documents section.
 - e. Marked as fully executed in MAESTRO
 - f. Acting Project Administrator is tasked

Suspense Reporting - Agriculture Programs									
Sponsor	Account	Document	Date	Sent Via	1 Wk Status Date	Staff	Director/Date	Principal Investigator	
18 Texas Cattle Feeders Assoc	M1000460	06-405957 (Extension)	1/28/2013			AC	1/28/13 DG		
19 USDA-FAS	M1302099	Agreement	5/9/2013	Hand carried		RMA	5/9/13 JZ	George McWhorter	
20 DSHS	M1301578	Amendment	3/11/2013	Hand Carried	04/02/13	RMA	3/11/13 JJ	Carol Rice	
21 Howard G Buffet Foundation	M1302927	Interim Funding Request	6/19/2013	Hand carried	6/26/2013	RMA	6/19/13 JZ	David Lunt	
22 East Wildlife Foundation	M1303216	Agreement	7/19/2013	Hand carried	8/6/2013	RMA	Returned to LC 8/6/2013	Armando Alonzo-History	
23 USDA-APHIS	M1300128	Article 23	8/6/2013	Hand carried	8/21/2013	RMA	8/6/2013		
24 Park Cities Quail	M1303261	Contract	8/20/2013	Hand carried	8/28/2013	LH	8/20/2013 JZ	Shuping Zhang	
25 TPWD	M1201227	Amendment No 4	8/20/2013	Hand carried	8/28/2013	RMA	8/20/2013 JZ	John Gold	
26 USDA-National Institute of Food and Agriculture	M1000279	No cost ext letter	7/9/2013	Signed already	8/14/2013	RMA	Already signed	Donna Martin	
27 USDA-MIS	M1303314	Agreement	8/1/2013	Hand carried	9/2/2013	RMA	8/1/2013 JZ	Kevin Cummings	
28 Texas Parks & Wildlife	M1100177	Accounts payable	8/13/2013	Hand carried		RMA	8/13/2013 JZ	Brett Collier	
29 DOI-National Park Service	M1303327	Agreement	8/2/2013	Standard Mail	8/29/2013	RMA	Already signed	Fred Smeins	
30 Texas A&M Agrilife	M1303200	Salary Enhancement	8/2/2013	Hand carried		RMA	8/2/2013 DH	Addison Lawrence	
31 DSHS	M1303443	Contract	8/16/2013	Hand carried	8/30/2013	RMA	8/16/2013 JZ	Carol Rice	
32 USDA-NRCS-CESU	M1303378	Agreement	8/16/2013	Hand carried	9/3/2013	RMA	8/16/2013 JZ	Thomas Gerik	
33 TCEQ	M1101064	Amendment No 4	8/21/2013	Hand carried	8/28/2013	RMA	8/21/2013 JZ	Brent Auvermann	
34 USDA-NRCS-CESU	M1303419	Notice of Grant	8/20/2013	Hand carried	8/28/2013	LH	8/20/2013 JZ	Sam Feagley	
35 USDA-FAS	M1300340	Agreement	8/19/2013	Hand carried		RMA	8/19/2013 JZ	Kevin Crosby	
36 Tx Dept of Family & Protective Services	M1302540	Contract	8/21/2013	Hand carried	8/29/2013	RMA	8/21/2013 JZ	Stephen Green	