



SPA Educational Modules

Onboarding Modules:

- **Principal Investigator (PI) Onboarding:** This onboarding session introduces researchers to the UT System, Sponsored Programs Administration (SPA), and system resources for which they will need to obtain access and will use to submit and manage proposals/awards. Additionally, Principal Investigators are given information about important meetings and communications from SPA aimed at informing the research community of updates and process changes.
 - **Department Administrator/Grants/Contracts/Finance Staff Onboarding:** This onboarding session introduces departmental research staff to UT System, Sponsored Programs Administration (SPA), and system resources for which they will need to obtain access and will use to submit and manage proposals/awards. Additionally, departmental research staff are given information about important meetings and communications from SPA aimed at informing the research community of updates and process changes.
-

Basic Science Series:

- **Proposal Submission and Pre-Award Overview**
This module introduces the research community to successful proposal submission, SPA vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to submit proposals, and important submission workflow information. Additionally, this level 1 series acts as an introduction to proposal components, key submission deadline information, direct/indirect costs, types of proposals, and Just-In-Time (JIT) procedures.
- **Non-Industry Agreements Overview**
This module introduces the research community to non-industry agreement essentials, specifically successful agreement submission, SPA vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to submit agreements for full execution, and important submission workflow information. Additionally, this level 1 series acts as an introduction to agreement types, key submission deadline information, direct/indirect costs, subrecipient vs. vendor determination, risk assessment and the Federal Demonstration Partnership (FDP).

- **NIH Essentials**

This module introduces the research community to the National Institutes of Health (NIH) and how to successfully submit funding applications. This level 1 series is intended for all research staff and acts as an introduction to the types of NIH grants, NIH-specific terms and conditions, deadline cycles, and system resources. This module was created by SPA in collaboration with others.
- **CPRIT Essentials**

This module introduces the research community to the Cancer Prevention & Research Institute of Texas (CPRIT) and how to successfully submit funding applications. This level 1 series is intended for all research staff and acts as an introduction to the types of CPRIT grants, CPRIT-specific terms and conditions, deadline cycles, and system resources. This module was created by SPA in collaboration with others.
- **Welch Essentials**

This module introduces the research community to The Welch Foundation and how to successfully submit funding applications. This level 1 series is intended for all research staff and acts as an introduction to the types of Welch grants, Welch-specific terms and conditions, deadline cycles, and system resources. This module was created by SPA in collaboration with others.
- **DOD Essentials**

This module introduces the research community to the Department of Defense (DOD) and how to successfully submit funding applications. This level 1 series is intended for all research staff and acts as an introduction to the types of DOD grants, DOD-specific terms and conditions, deadline cycles, and system resources. This module was created by SPA in collaboration with others.
- **Award Acceptance Overview**

This module introduces the research community to the award intake and setup process, specifically an overview of the post-award process, SPA vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to successfully manage awards, notice of award (NOA) information, award terms and conditions overview, and important award setup workflow information. Additionally, this module provides key chart of accounts (COA) information and advance account request procedures.
- **Award Maintenance Overview**

This module introduces the research community to the award maintenance and modification process, specifically an overview of the post-award process, SPA vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to successfully manage awards, Uniform Guidance & Cost Principles overview, direct/indirect costs, award modification types, the importance of monthly financial monitoring, cost transfers, direct retros and financial compliance.
- **Introduction to Revenue Cycle and Cash Management**

This module introduces the research community to the revenue cycle and cash management functions in SPA, specifically an overview of the post-award process, SPA

vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to successfully manage invoicing, Uniform Guidance & Cost Principles overview, determining the bill type, budget vs. revenue and Payment Management System (PMS) overview.

- **Financial Reporting and Award Closeout Overview**

This module introduces the research community to the financial reporting and award closeout functions in SPA, specifically an overview of the post-award process, SPA vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to successfully manage submission of financial reports and reconciliations for award close-out procedures.

- **Salary & Wage Confirmation Overview**

This module introduces the research community to the updated Salary & Wage Confirmation process and PF005 Report. The PF005 Report provides a standardized view of salary and wage information for those employees sourced to sponsored research. It allows the PI and delegated departmental staff to review actual versus budget at the individual employee sourcing level to validate “reasonableness” of these salary charges across the PI’s research portfolio, as required by Uniform Guidance 2 CFR 200.430. This module was created by SPA in collaboration with others.

- **NIH Training Grants Overview**

This module introduces the research community to NIH training grant fundamentals, processes for proposal submission and award management for pre- and post-doctoral fellows and trainees in basic, clinical and behavioral research. Users will be introduced to system resources during the pre- and post-award stages, progress reports and notice of award.

- **eGrants Proposal Submission for Non-Grants.gov Applications**

This module introduces the research community to successfully submitting a Non-Grants.gov proposal. Users are shown how to navigate eGrants as well as decision points for proper application classification. Users should be able to submit a Non-Grants.gov proposal upon completion of this training. This module was created by SPA in collaboration with others.

- **eGrants Proposal Submission for Grants.gov Applications**

This module introduces the research community to successfully submitting a Grants.gov proposal. Users are shown how to navigate eGrants as well as decision points for proper application classification. Users should be able to submit a Grants.gov proposal upon completion of this training. This module was created by SPA in collaboration with others.

- **Flow Through Proposal Submission Process**

This module introduces the research community to the step-by-step process for submission of a flow through or back-in flow through proposal. Users are taken through each page of the eGrants SmartForm and given guidance for successful budget creation. This module was created by SPA in collaboration with others.

- **Updated Process of Flow Through Awards without Automatic Carryforward**
This module introduces the research community to the updated process for submission of flow through awards that do not have automatic carryforward. Users are shown how to implement multiple budgets under the same award ID number. This module was created by SPA in collaboration with others.
-

Clinical Research Series:

- **Clinical Research Services Overview**
This module introduces the research community to the important functions of Coverage Analysis and Industry Agreement negotiation by the Office of Clinical Research Services (CRS), within SPA. Specifically, users are introduced to the concept of clinical research, SPA vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to successfully execute industry agreements and submit coverage analysis requests.
 - **Clinical Trial Accounting & Analysis Overview**
This module introduces the research community to the clinical trial finance workflow, SPA vs. PI/Dept. roles & responsibilities, system resources for which they will need to obtain access and will use to create and manage the project budget.
 - **Introduction to ClinCard by Greenphire**
This module introduces the clinical research community to the ClinCard by Greenphire system. ClinCard is a web-based platform that allows users to manage clinical research participant payments. Users are introduced to gaining access in the system, how to navigate ClinCard and important contact information for usage assistance. This module was created by SPA in collaboration with others.
 - **ClinCard Compliance and Best Practices**
This module introduces the clinical research community and provides tips to enhance usage of the ClinCard system to ensure compliance. This module was created by SPA in collaboration with others.
 - **Clinical Trial Budgeting**
This module introduces the clinical research community and provides tips to enhance the budgeting process. Users will learn the basics of clinical trial budgeting, such as ensuring all fees are accounted for and included and useful tips for creation of a healthy and inclusive budget. This module was created by SPA in collaboration with others.
 - **Clinical Trial Sponsor Negotiations**
This module introduces users to the basics of clinical trial sponsor negotiations for successful execution of the clinical trial agreement and budget development. Users will learn the importance of identifying the components of a clinical trial budget and how to effectively negotiate payment terms and conditions. This module was created by SPA in collaboration with others.
-

Financial Management:

- **Reporting Toolkit for Effective Financial Management**

This module introduces users to ORBIT (Online Reporting Business Intelligence Tools) and Power BI. Users will learn about multiple helpful reports created in Power BI that assist in obtaining valuable information essential to successful financial management of research funding, as well as capturing an overarching picture of your key performance indicators. This module was created by SPA in collaboration with others.

- **Cost Transfer Policy**

This module introduces users to the cost transfer guidance, as part of RES-252 Accounting for Sponsored Programs Policy. This training will walk users through the policy overview, changes from prior guidance, and required documentation. Additionally, users are given instruction on how to perform non-salary cost transfers and payroll reallocations. This module was created by SPA in collaboration with others.