Which SPA Team Can Help Me?

How to route your ServiceNow ticket

Please use the table below when deciding the team to route your ServiceNow ticket. If you cannot determine which team can assist with your inquiry, select, or type in **Unassigned (SPA)** in the Assignment Group field on the Ask SPA a Question form.

<table>
<thead>
<tr>
<th>Team Name</th>
<th>Common request types but not limited to:</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Unassigned (SPA)</em></td>
<td>Default Assignment Group queue for all new and transferred tickets including ones from other ITIL groups</td>
</tr>
</tbody>
</table>
| Proposals Team (SPA)                   | • eGrants  
  o Proposal and Modifications submissions (excludes Revision and Re-budget modifications)  
  o Progress Reports/RPPR/Continuations  
  o Termination statements/Invention statements  
  o Funding proposal assignments and reassignments  
  o Deliverables due after submission  
  o Just-in-Time (JIT)/pre-award negotiation  
  o Edit/view access for funding proposals  
  ▪ IF request is to add or remove customer to mass number of funding proposal, request to be made to ServiceDesk/AIS  
  ▪ Submitting Dept/Division routing change  
  ▪ IF request is to add or remove Department Approver, request to be made to ServiceDesk/AIS  
  • Assistance with Sponsor site affiliations or access Deadline waiver requests |
| Non-Industry Contracts Team (SPA)      | • Subrecipient Profile Questionnaire (W-8, W-9 forms, A-133 Audit form)  
  • eAgreements  
  o Agreement submissions for Non-Industry:  
  ▪ CTA – Clinical Trial Agreements (Federally sponsored)  
  ▪ CTMA – Clinical Trial Master Agreements (Federal/Foundation/Private)  
  ▪ GAA – Grant Award Agreements  
  ▪ FLW – Flow-throughs  
  ▪ SUB - Subawards  
  ▪ RSA – Research Service Agreements |
| **Industry Contracts Team (SPA)** | • eAgreements  
 o Agreement and Amendment submissions for Industry:  
   ▪ CTA – Clinical Trial Agreements (Industry sponsored)  
   ▪ MRA – Master Research Agreements (Industry sponsored)  
   ▪ CTMA – Clinical Trial Master Agreements (Industry sponsored)  
   ▪ CDA – Confidential Disclosure Agreements  
   ▪ CTS – Clinical Trial Subcontracts  
   ▪ TUA – Treatment Use Agreements  
   ▪ IFLW – Industry Flow-Through Agreements  
   ▪ MISC – ex: Industry ECL – Epic Care Link Agreements  
   Velos Study inquiries regarding agreements and study sites |
| **Coverage Analysis (SPA)** | • Coverage Analysis fee inquiries  
 • Velos tasks and inquiries:  
   o Review of newly submitted studies  
   o Review of modification submissions  
 QA of grids for new studies |
| **Setup Team (SPA)** | • Chart of Accounts (COA) setup  
 o Type of award setups through PeopleSoft:  
   ▪ Federal Direct 1:1 Awards  
   ▪ Flow-Through (UTSW Sub-recipient) Awards  
   ▪ UT System Awards  
   ▪ Technology Development Awards  
   ▪ Contracts Management Awards  
   ▪ Private Awards  
   ▪ State of Texas Awards  
   ▪ Clinical Trials  
 • eGrants  
   o Pre-Award funding  
 Approved NOA modifications |
| **Maintenance Team (SPA)** | • PeopleSoft (PS)  
 o No cost extensions (NCE)  
 o PI name change  
 o Contract type correction |
<table>
<thead>
<tr>
<th>Department ID change</th>
<th>Project creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award title/description changes</td>
<td>Rebudgets</td>
</tr>
<tr>
<td>Carryover/Carry forward (primarily for any grant type unless it’s an offset)</td>
<td>Sponsor change</td>
</tr>
<tr>
<td>Early termination</td>
<td>Change in Terms &amp; Conditions</td>
</tr>
<tr>
<td>Offsets (specific grant types)</td>
<td></td>
</tr>
<tr>
<td>Transaction Overrides on SPA projects</td>
<td></td>
</tr>
<tr>
<td>Procurement Portal Requisition approvals</td>
<td>Subrecipient Invoice Submissions (GMO)</td>
</tr>
<tr>
<td>RGC Purchase Orders (PO) – reconciliation requests and AP inquiries</td>
<td></td>
</tr>
<tr>
<td>Unobligated balance requests</td>
<td></td>
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</tbody>
</table>

**Revenue Team (SPA)**
- Invoice requests
- Refund request
- Manage accounts receivable
- Reconciliation requests
- Bill plan setup for new awards in PS
- DSB invoices for CMCRI and Moncrief

**Reporting Team (SPA)**
- Financial reports for SPA awards
  - Notifications of reports due
  - Related general inquiries
  - Review and determination of expenditure movements (NSCT, Direct Retro, subaward encumbrances, validation of authorized funds)
  - Provide copies of financial report upon request
  - Reports are uploaded into eGrants and PeopleSoft
  - xTrain form review/approval
- Fellowship financial reports if required

**Cash Management Team (SPA)**
- Process and submit reports to the Federal Government
- Manage and process Federal draws
- Payments and Payment Application
  - Review of missing payment requests
  - Review of On Account and lockbox deposits
  - Cash corrections
- Payment document support - when applicable

**Clinical Trial Finance Team (SPA)**
- ClinCard
  - Set up in Greenphire per SIP forms
  - Inquiries in Greenphire
  - Clincard waivers for approval
- **Note physical clincards handled by Accounting Cash Management**
<table>
<thead>
<tr>
<th>Sponsored P</th>
<th>Pr ograms Administration - BPO - November 2022</th>
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<tbody>
<tr>
<td><strong>Closeout Team (SPA)</strong></td>
<td>- Review and perform closeout procedures for expired or nearing expired projects and associated charts of account (COA); includes:&lt;br&gt;  - Monitor progression to closed status&lt;br&gt;  - Notification of termination of award or project</td>
</tr>
<tr>
<td><strong>Compliance (SPA)</strong></td>
<td>- Uniform Guidance Compliance Questionnaires&lt;br&gt;  - Audit inquiries&lt;br&gt;  - Single Audit Compliance forms or Questionnaires&lt;br&gt;  - Survey Data and State Reports&lt;br&gt;  - Sponsor or Subrecipient setups&lt;br&gt;    - Add or inactive sponsors/subrecipients names into eResearch suite&lt;br&gt;  - Salary and Wage Confirmation (S&amp;WC)&lt;br&gt;    - Training&lt;br&gt;    - General Questions&lt;br&gt;    - Errors requested to be corrected&lt;br&gt;    - Access to SharePoint for S&amp;WC&lt;br&gt;  PFr005 EDW report regarding S&amp;WC</td>
</tr>
<tr>
<td><strong>Business Process Outreach (SPA)</strong></td>
<td>- Education and training&lt;br&gt;  - SPA Taleo Modules&lt;br&gt;  - SPA Listservs &amp; Research Roundup Invitations&lt;br&gt;  SPA Internal assistance requested</td>
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