

Which SPA Team Can Help Me?

How to route your ServiceNow ticket

<p>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 <u>Unassigned (SPA)</u> in the Assignment Group field on the Ask SPA a Question form.</p>	
Team Name	Common request types but not limited to:
*Unassigned (SPA)	Default Assignment Group queue for all new and transferred tickets including ones from other ITIL groups
Proposals Team (SPA)	<ul style="list-style-type: none"> • eGrants <ul style="list-style-type: none"> ○ Proposal and Modifications submissions (excludes Revision and Re-budget modifications) ○ Progress Reports/RPPR/Continuations ○ Termination statements/Invention statements ○ Funding proposal assignments and reassignments ○ Deliverables due after submission ○ Just-in-Time (JIT)/pre-award negotiation ○ Edit/view access for funding proposals <ul style="list-style-type: none"> ▪ 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 <ul style="list-style-type: none"> ▪ 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)	<ul style="list-style-type: none"> • Subrecipient Profile Questionnaire (W-8, W-9 forms, A-133 Audit form) • eAgreements <ul style="list-style-type: none"> ○ Agreement submissions for Non-Industry: <ul style="list-style-type: none"> ▪ 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

	<ul style="list-style-type: none"> ▪ MISC – ex: Non-Industry MOU, Collaborative Research Agreements, etc.) ○ Amendment submissions for Non-Industry <ul style="list-style-type: none"> ▪ FLW, SUB, GAA, MISC ○ Edit/view access for agreements or amendments • RGC Purchase Orders (PO) <ul style="list-style-type: none"> ○ Encumber/Disencumber funds <p>Subaward PO Inquiries</p>
Industry Contracts Team (SPA)	<ul style="list-style-type: none"> • eAgreements <ul style="list-style-type: none"> ○ Agreement and Amendment submissions for Industry: <ul style="list-style-type: none"> ▪ 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 <p>Velos Study inquiries regarding agreements and study sites</p>
Coverage Analysis (SPA)	<ul style="list-style-type: none"> • Coverage Analysis fee inquiries • Velos tasks and inquiries: <ul style="list-style-type: none"> ○ Review of newly submitted studies ○ Review of modification submissions <p>QA of grids for new studies</p>
Setup Team (SPA)	<ul style="list-style-type: none"> • Chart of Accounts (COA) setup <ul style="list-style-type: none"> ○ Type of award setups through PeopleSoft: <ul style="list-style-type: none"> ▪ 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 <ul style="list-style-type: none"> ○ Pre-Award funding <p>Approved NOA modifications</p>
Maintenance Team (SPA)	<ul style="list-style-type: none"> • PeopleSoft (PS) <ul style="list-style-type: none"> ▪ No cost extensions (NCE) ▪ PI name change ▪ Contract type correction

	<ul style="list-style-type: none"> ▪ Department ID change ▪ Project creation ▪ Award title/description changes ▪ Rebudgets ▪ Carryover/Carry forward (primarily for any grant type unless it's an offset) ▪ Sponsor change ▪ Early termination ▪ Change in Terms & Conditions ▪ Offsets (specific grant types) <ul style="list-style-type: none"> ○ Transaction Overrides on SPA projects <ul style="list-style-type: none"> • Procurement Portal Requisition approvals • Subrecipient Invoice Submissions (GMO) • RGC Purchase Orders (PO) – reconciliation requests and AP inquiries <p>Unobligated balance requests</p>
Revenue Team (SPA)	<ul style="list-style-type: none"> • Invoice requests • Refund request • Manage accounts receivable • Reconciliation requests • Bill plan setup for new awards in PS <p>DSB invoices for CMCRI and Moncrief</p>
Reporting Team (SPA)	<ul style="list-style-type: none"> • Financial reports for SPA awards <ul style="list-style-type: none"> ○ 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 <p>Fellowship financial reports if required</p>
Cash Management Team (SPA)	<ul style="list-style-type: none"> • Process and submit reports to the Federal Government • Manage and process Federal draws • Payments and Payment Application <ul style="list-style-type: none"> ○ Review of missing payment requests ○ Review of On Account and lockbox deposits ○ Cash corrections <p>Payment document support - when applicable</p>
Clinical Trial Finance Team (SPA)	<ul style="list-style-type: none"> • ClinCard <ul style="list-style-type: none"> ○ Set up in Greenphire per SIP forms ○ Inquiries in Greenphire ○ ClinCard waivers for approval ○ Note physical ClinCards handled by Accounting Cash Management

	<ul style="list-style-type: none"> • Service Order Agreement (SOA) <ul style="list-style-type: none"> ○ RGC PO setup per SOA • Clinical Trial NBP COA awards <ul style="list-style-type: none"> ○ Date extension requests <p>F&A adjustments</p>
Closeout Team (SPA)	<ul style="list-style-type: none"> • Review and perform closeout procedures for expired or nearing expired projects and associated charts of account (COA); includes: <ul style="list-style-type: none"> ○ Monitor progression to closed status <p>Notification of termination of award or project</p>
Compliance (SPA)	<ul style="list-style-type: none"> • Uniform Guidance Compliance Questionnaires • Audit inquiries • Single Audit Compliance forms or Questionnaires • Survey Data and State Reports • Sponsor or Subrecipient setups <ul style="list-style-type: none"> ○ Add or inactive sponsors/subrecipients names into eResearch suite • Salary and Wage Confirmation (S&WC) <ul style="list-style-type: none"> ○ Training ○ General Questions ○ Errors requested to be corrected ○ Access to SharePoint for S&WC <p>PFr005 EDW report regarding S&WC</p>
Business Process Outreach (SPA)	<ul style="list-style-type: none"> • Education and training <ul style="list-style-type: none"> ○ SPA Taleo Modules • SPA Listservs & Research Roundup Invitations <p>SPA Internal assistance requested</p>