Overview: The MyFunding module will be used to process a Fee-For-Service Agreement.

Example:

A Fee-For-Service agreement is anticipated after working with the Office of Sponsored Programs Fee-For-Service Team to determine correct path and costs. This will need to be entered into MyFunding for review, processing, and approval.

Where to Start

1. Log-in to the PERIS™ solution and click the MyFunding tab:

2. Click “Create Funding Proposal”:

3. Complete the information as it relates to the fee-for-service activities in the “Proposal Description & Contacts” SmartForm:
   a. Enter a Title that describes the fee for service activity:
      
      1.0 * Title of proposal: 

   b. Update the Principal Investigator (who at the University is responsible for this activity), if not you:
      
      2.0 * Principal Investigator / Program Director / Fellow:

   c. Select a Department Administrator:
      
      3.0 * Department Administrator:
d. Select an Application Type (New or Renewal):  

4.0 * Type of Application:  

- New  
- Revision  
- Resubmission  
- Renewal

e. Select the customer (recipient of services) as the Direct Sponsor:  

5.0 * Select Direct Sponsor: ?

f. Answer No to the question “Is this a NIH Tethered Application or NSF Collaborative Proposal?”  

* Is this a NIH Tethered Application or NSF Collaborative Proposal?  

- Yes  - No  Clear

g. Indicate if there are other personnel associated with the project who will be included on the budget.  

6.0 * Are there other personnel associated with this funding proposal included on the budget?  

- Yes  - No  Clear

4. If it was indicated that there are additional personnel on the budget, you will continue to the Additional Personnel SmartForm.  

a. Add personnel by selecting “+Add”
1.0 Select all institutional personnel to be involved in the project:

b. Select the personnel, their role, and their key personnel determination:

1. * Select personnel:

2. * Select project role:

5. * This individual is a:
   - Senior / Key Person on the proposal
   - Other Significant Contributor on the proposal
   - Other Personnel

c. Review the COI Disclosure Date of the personnel that you have entered for compliance:

   COI Disclosure Date: 03/04/2019

5. Continue to the General Proposal Information SmartForm:

a. Answer “No” to the question, “Is this award transferring from another Institution?”

2.0 * Is this award transferring from another Institution?
   - Yes
   - No
   - Clear

b. Select “Other (Submitted by Office of Sponsored Programs)” as the method in which the forms will be submitted to the Customer/Client:
3.0 * Indicate how the forms will be submitted to the Sponsor:
   - Grants.gov via Click Grants (SF424)
   - Other (Submitted by Office of Sponsored Programs)
   - Other (Submitted by Department)

c. Select Fee for Service as the Instrument Type:

4.0 * Please select the Instrument Type:
   - Grant
   - Contract
   - Cooperative Agreement
   - Subaward/Subcontract
   - Fee-For-Service
   - Other

d. Indicate if the funds will originate from a federal contract:
   **Will this originate from a Federal Contract?**
   - Yes
   - No

   [Clear]

e. Answer “No” to Modular Budget:

5.0 * Modular Budget:
   - Yes
   - No

   [Clear]

f. Choose “Other” to describe the purpose of the project:

6.0 * Describe the purpose of this project:
   - Other

   [Clear]

g. In the text box that appears enter “Fee for Service”
   **If Other, specify below:**

   Fee for Service

   [Clear]

h. Indicate that this is not a limited submission:
6. Continue to the Research Department/Division Determination SmartForm.
   a. MyFunding will default the submitting department to the Principal Investigator’s home department. If the submitting department is different select “No” and update:

   1.0 Will the submitting department/division/center/institute be the PI’s home department:
   ○ Yes  ○ No  Clear

7. Continue to the Compliance Review SmartForm.
   a. Indicate if any of the below items are involved in the project:

   1.0 For each item listed below, indicate if it is involved in this project:
   * Human Subjects:  
   ○ Yes  ○ No  Clear
   * Vertebrate Animals:  
   ○ Yes  ○ No  Clear
   * Hazardous Materials:  
   ○ Yes  ○ No  Clear
   * Human Stem Cells:  
   ○ Yes  ○ No  Clear
   * Regional Biocontainment Lab:  
   ○ Yes  ○ No  Clear

8. Continue to the General Submission Information SmartForm.
   a. Enter “Fee for Service” as the Opportunity ID:

   2.0 Opportunity ID:
   Fee for Service

9. Continue to the Submission Dates SmartForm.
   a. Enter a date by which this agreement should be finalized as the “Application submission deadline”:

   1.0 Application submission deadline:  
   7/1/2020
b. Enter the start date of the services as the “Requested Start Date”:

4.0  **Requested Start Date:** ?

1/1/2021

10. Continue to the Budget Periods SmartForm.
   a. By default, there will be five budget periods. Remove four budget periods, so that only one remains. A budget period can be any length of time (ex: 5 months or 3 years):

   ![Budget Periods SmartForm](image)

   b. Adjust the end date (anticipated agreement termination) if necessary:

   ![Adjusted End Date](image)

11. Continue to the Performance Sites SmartForm.
   a. Indicate if any of the services will be conducted in a foreign county. If so, select from the pick list:

   ![Foreign Country Indicator](image)

   * **Will any of the activities in this proposal be conducted in a foreign country?**
   - Yes  
   - No  
   ![Country Selection](image)

   * **If yes, please select the countries:**

12. Continue to the Keywords SmartForm.
   a. Add at least one keyword that describes the services being performed:
13. Continue to the Additional Information SmartForm.
   a. Review questions and update if necessary:
   
   **1.0 · Does the proposed research project require a Data Sharing Plan as a sponsor requirement?**
   - Yes
   - No

   **2.0 · Does the project involve a potentially patentable discovery or invention?**
   If yes, the discovery or invention must be disclosed pursuant to University Policy and Procedure 11-02-01, Patent Rights and Technology Transfer. If any such discovery or invention arises in the performance of the project, the patent policy and procedure must be followed.
   - Yes
   - No

   **3.0 · Does the proposed research project require an Authentication Plan of Key Biological and/or Chemical Resources?**
   - Yes
   - No

   **4.0 · Are there other active non-financial agreements related to this project (i.e. CDA, DUA, MTA, Master)?**
   - Yes
   - No

   **5.0 · Does the proposed research project involve an anticipated transfer of materials to or from the University?**
   - Yes
   - No

14. Continue to Completion Instructions.
   a. Click Finish.

15. Complete the General Budget Information SmartForm:
   a. Click on the Name of the budget that has been created:

   **Working Budgets**
   
<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BU00016937</td>
<td>test</td>
</tr>
</tbody>
</table>

   b. Click Edit Budget:
c. Provide General Budget Information.

Answer “No” to question 8 “Do you intend to compete a detailed budget?”, and upload the fee-for-service budget under “Upload sponsor budget”:

16. The Personnel Cost section can be skipped. Continue to the General Cost SmartForm.

   a. Two Cost Types will be available, Direct Cost F&A Applied and Direct Costs F&A Not Applied. Add each Cost Type as applicable and provide a description:
b. Please note: If your indirect costs are built into your fee, select “NONE” as the Cost Base Type on the General Budget Information SmartForm. On the General Cost SmartForm, select “Direct Costs F&A Applied” as the Cost Type and uncheck the “Apply Indirects” box.

c. Save and Exit.

17. Attach relevant documents including the Scope of Work, draft agreement (if available), and any other relevant documents through the “Add Attachments” activity:

   ![Add Attachments]

18. Route for approval:

   ![Submit For Department Review]