

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

Example:

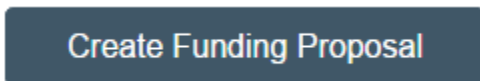
A Fee-For-Service agreement is anticipated after working with the Office of Sponsored Programs Fee-For-Service Team to determine correct path and costs. This will need to be entered in to MyFunding for review, processing, and approval.

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:

Michael Ranieri

- 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:

+ Add

- 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

g. In the text box that appears enter “Fee for Service”

If Other, specify below:

Fee for Service

h. Indicate that this is not a limited submission:

7.0 * Is this a limited submission?

Yes No [Clear](#)

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):

5	Period Number	5	12	4/2/2024	4/1/2025	Remove
	Period Name	Period 5				

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

Add	1	row:	Add	Duration (Months)	Start	End
1	Period Number	1	12	1/1/2021	12/31/2021	
	Period Name	Period 1				

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:

*** Will any of the activities in this proposal be conducted in a foreign country?**

Yes No [Clear](#)

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

...


12. Continue to the Keywords SmartForm.

a. Add at least one keyword that describes the services being performed:

1.0 * Please select any Keywords


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 [Clear](#)

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 [Clear](#)

3.0 * Does the proposed research project require an Authentication Plan of Key Biological and/or Chemical Resources? 

Yes No [Clear](#)

4.0 * Are there other active non-financial agreements related to this project (i.e. CDA, DUA, MTA, Master)? 

Yes No [Clear](#)

5.0 * Does the proposed research project involve an anticipated transfer of materials to or from the University? 

Yes No [Clear](#)

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:

Budgets [History](#) [S](#)

Working Budgets

ID	Name
 BU00016937	test 

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”:

8. * Do you intend to complete a detailed budget?

Yes No [Clear](#)

*** Upload sponsor budget**

[None]

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:

*Cost Type:	Direct Costs F&A Applied	Cost:	\$5,000.00
Desc:	travel		
Cost:	\$ 5000		
Apply Inflation:	<input checked="" type="checkbox"/>		
Apply Indirects:	<input checked="" type="checkbox"/>		
*Cost Type:	Direct Costs F&A Not Applied	Cost:	\$10,000.00
Desc:	equipment		
Cost:	\$ 10000.00		

Processing a Fee-For-Service Agreement

- 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](#)