



Processing 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 the correct path and costs. This will need to be entered into MyFunding for review, processing, and approval.

From the MyFunding tab select Create Funding Proposal.



Questions that are required will be preceded by a red asterisk. Help for each item can be found by selecting the question mark icon that follows each.

The General Proposal Information SmartForm

1. Complete the General Proposal Information SmartForm starting with the Type of Application (New or Renewal).

A screenshot of the "1. * Type of application: ?" section of the SmartForm. It features a list of four radio button options: "New", "Revision", "Resubmission", and "Renewal". The "New" option is selected. A question mark icon is located to the right of the question text.

2. Enter a Short and Long Title.

2. * Short title of proposal: ?

3. * Long title of proposal: ?

3. If necessary, edit the Principal Investigator. This field will default to the individual that selected Create Funding Proposal. When the X icon is present selecting it will clear the data and allow a progressive text entry. If an advanced search is necessary, select the box with the three ellipses.

*** Principal investigator**

Eric Larson

4. Enter Sponsor data.

*** Select Direct Sponsor: ?**

a. If Sponsor does not appear in list, enter name here:

b. If flow through, select Prime Sponsor:

c. If Prime Sponsor does not appear in list, enter name here:

5. Select No for if this is a NIH Tethered Application or NSF Collaborative Proposal. Select Fee for Service as the Instrument Type. Indicate if the funds will originate from a federal contract.

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

☐ Yes ☐ No [Clear](#)

Instrument type: ?

- ☐ Grant
- ☐ Contract
- ☐ Cooperative Agreement
- ☐ Subaward/Subcontract
- ☐ Fee For Service
- ☐ Other

Will this originate from a Federal Contract or Other Transaction Agreement(OTA)?

☐ Yes ☐ No [Clear](#)

6. Disclose the Primary Purpose of the Project.

*** Primary purpose of this project: ?**

- ☐ Research and Development
- ☐ Curriculum Development/Enhancement
- ☐ Other Training
- ☐ Research Fellowship
- ☐ Research Training
- ☐ Scholarship or Fellowship (non-research) Program
- ☐ Community Service Program
- ☐ Conference Grant
- ☐ Construction/Renovation Grant
- ☐ General Program Support (non-gift)
- ☐ Instrumentation/Equipment Grant
- ☐ Intergovernmental Personnel Act (IPA) Agreement
- ☐ Clinical Trial
- ☐ Other

7. Enter the Expected Start Date.

*** Expected start date: ?**

8. Indicate this is not a limited submission.

*** Is this a limited submission?** ?

☐ Yes ☒ No [Clear](#)

The Personnel SmartForm

1. Indicate if this is a multi-PI submission. Answer in the affirmative if more than one individual has the role of Principal Investigator in the project. All participants with the role of Principal Investigator will need to complete the PI Certification.

*** Is this a multi-PI Submission:**

☐ Yes ☐ No [Clear](#)

2. Review the defaulted value of the department responsible for the submission. If a change is necessary, answer No and enter the department responsible.

Will the submitting department/division/center/institute be the PI's home department: Office of Sponsored Programs

***** ☐ Yes ☒ No [Clear](#)

*** Select a Submitting Department/Center/Institute that is different than the Department value shown above:**

...

3. Select +Add to provide details of project personnel.

Project personnel:

a. Select all institutional personnel to be involved in the project:

[+ Add](#)



Last Name	First Name	Key	Role	Biosketch
There are no items to display				


b. Identify all non-institutional personnel (except subaward/subcontractor personnel) to be involved in the project:

[+ Add](#)


4. Provide the name of the Department Administrator responsible for the proposal and enter other individuals that require Edit or Read rights.

Administrative personnel:

a. Department administrator:
Eric Larson  

b. Select team members that have EDIT rights (in addition to the PI and Department Administrator)


Last Name	First Name	Department	E-mail
There are no items to display			

c. Select team members that have READ only rights:


The Submission Information SmartForm

1. Enter “Fee for Service” as the Opportunity ID.

Opportunity ID:

Fee for Service

2. Indicate Office of Sponsored Programs will be submitting this proposal.

*** Who will be submitting this Proposal?**

☒ Office of Sponsored Programs


☐ Department

[Clear](#)

The Budget Periods and Key Dates SmartForm

1. Enter a date by which this agreement should be finalized as the Application submission deadline.

*** Application submission deadline: ?**

7/1/2023 

Office of Sponsored Programs submission deadline:

Please click on Save above to populate this field.

6/27/2023

2. Indicate whether or not the budget will be modular.

*** Modular budget?**
☐ Yes ☒ No [Clear](#)

3. The SmartForm will default to five budget periods. Remove four budget periods, so that only one remains. A budget period can be any length of time.

[Add Period](#) [Remove Period](#) [Update Periods](#)

The Pitt Additional Information SmartForm

1. Review and answer the required questions.

The Keywords SmartForm

1. At least one keyword describing the project must be provided. Click +Add, select an existing keyword or add a keyword of your own.

*** Please select any Keywords from the below list that describe the research that you will be conducting: ?**
[+ Add](#)

The Compliance Review SmartForm

1. Indicate if the compliance items are involved in the project. If so, you will be required to provide additional information.

For each item listed below, indicate if it is involved in this project:

* Human Subjects: ?	<input type="radio"/> Yes <input checked="" type="radio"/> No Clear
* Vertebrate Animals: ?	<input type="radio"/> Yes <input checked="" type="radio"/> No Clear
* Hazardous Materials: ?	<input type="radio"/> Yes <input checked="" type="radio"/> No Clear
* Human Stem Cells: ?	<input type="radio"/> Yes <input checked="" type="radio"/> No Clear
* Human Fetal Tissue: ?	<input type="radio"/> Yes <input checked="" type="radio"/> No Clear
* Regional Biocontainment Lab: ?	<input type="radio"/> Yes <input checked="" type="radio"/> No Clear

2. Indicate if the PI and/or Co-PI signed a University of Pittsburgh IP Agreement.

*** Have the Principal Investigator and Co-Principal Investigator signed a University of Pittsburgh IP Agreement? ?**
☐ Yes ☐ No [Clear](#)

3. Indicate if Controlled Unclassified Information (CUI) be generated or handled under this project.

*** Will Controlled Unclassified Information (CUI) be generated or handled under this project?** ?

☒ Yes ☐ No [Clear](#)

The Additional Proposal Information SmartForm

1. Review the Sponsored Research Location, indicate if there will be program income, and if activities are being conducted in a foreign country provide them.

Sponsored Research Location (Institution):

The University of Pittsburgh
300 Murdoch I Building
3420 Forbes Avenue
Pittsburgh , PA 15260-3203

a. If there are additional internal project/performance locations (do not include subsites), select them below:

...

Name	Building Abbreviation
There are no items to display	

*** Will there be program income?** ?

☐ Yes ☒ No [Clear](#)

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

☐ Yes ☒ No [Clear](#)

Review the Completion Instructions and click Finish


The General Budget Information SmartForm

1. Select the name of the budget that you are preparing to complete.

Budgets **History**

Working Budgets

Name

 Pittsburgh Curling Club

2. Complete the General Budget Information SmartForm.

3. Enter a Title (or keep the default title). Select the Principal Investigator. Indicate whether this is a Subaccount budget or not. Determine the work location.

*** Budget title:** ?

Pittsburgh Curling Club

*** Principal Investigator for this budget:**

Eric Larson

*** Is this a Subaccount budget?** ?

☐ Yes ☒ No [Clear](#)

*** Is this work On or Off Campus?** ?

If you change the rate from On-Campus, it will be necessary to click [SAVE](#) above for the correct rates to appear.

☒ On Campus
☐ Off Campus

4. Does this budget use the standard indirect cost base and rates? The rate pulled into your budget is determined by the type of project selected on the Funding Proposal General Proposal Information SmartForm. If this rate is correct indicate Yes.

*** Does this budget use the standard indirect cost base and rates?**

☒ Yes ☐ No [Clear](#)

Standard F&A cost base and rates

F&A Cost Base	Period	1	2
	Start:	7/1/2023	7/1/2024
	End:	6/30/2024	6/30/2025
MTDC	Rate:	59%	59%

If the indirect cost rate pre-populated into your budget is not the rate that is going to be used select No, enter the rates into the table, and select why a different rate is being used.

*** Does this budget use the standard indirect cost base and rates?** ?

☐ Yes ☒ No [Clear](#)

Standard F&A cost base and rates

F&A Cost Base	Period	1	2
	Start:	7/1/2023	7/1/2024
	End:	6/30/2024	6/30/2025
MTDC	Rate:	59%	59%

Non-standard F&A cost base and rates

F&A Cost Base	Period	1	2
	Start:	7/1/2023	7/1/2024
	End:	6/30/2024	6/30/2025
MTDC	Rate:	10%	10%

*** If no, indicate why:** ?

☐ Sponsor Mandated
☐ F&A Waiver

5. Indicate that a detailed budget is not going to be completed within MyFunding. Upload the Fee-for-Service budget.

*** Do you intend to complete a detailed budget?**
☐ Yes ☒ No [Clear](#)

*** Upload sponsor budget**
[None]

6. Will this budget be included in the proposal? Selecting Yes incorporates the budget in the total dollars found on the Funding Proposal's Financials tab.

Include in proposal budget?
☒ Yes ☐ No [Clear](#)

7. Verify the salary cap.
8. Complete the inflation rate questions.

Apply inflation rate to personnel costs?
☒ Yes ☐ No [Clear](#)

Enter inflation rates:

	Inflation Rate	Inflate Period 1
Personnel Cost:	<input type="text" value="3"/> %	<input type="checkbox"/>
General Cost:	<input type="text" value="3"/> %	<input type="checkbox"/>

The Personnel Cost Definition SmartForm

1. When preparing a non-detailed budget this SmartForm can be bypassed.

The Personnel Costs SmartForm

1. When preparing a non-detailed budget this SmartForm can be bypassed.

The General Cost Definition SmartForm

1. For a non-detailed budget there will be two selectable budget categories. Direct Cost F&A Applied and Direct Cost F&A Not Applied. Select the appropriate category, enter an amount, provide a description, and determine if inflation is to be applied. If you select to not apply inflation the budget table on the General Costs SmartForm will be open for editing.

Add General Cost

1. * General cost type:

2. Direct Costs F&A Applied
Direct Costs F&A Not Applied
\$0.00

3. Description:

2. Select OK to add the budget items.

General Cost Definition

1. General costs:

+ Add

	Cost Type	Description	Cost
Update	Direct Costs F&A Applied	travel	\$10,000.00
Update	Direct Costs F&A Not Applied	equipment	\$20,000.00

The General Costs SmartForm

1. If you selected that inflation is not to be applied for any category on the General Costs Definition SmartForm the entry for that item will be editable in the General Costs table. One reviewed and complete save and exit the SmartForm.

General Costs		
Save	Period 1 3/9/2021 3/8/2022	Period 2 3/9/2022 3/8/2023
Cost Type: Direct Costs F&A Applied Description: travel	\$10,000.00	\$10,000.00
Cost Type: Direct Costs F&A Not Applied Description: equipment	\$20,000.00	\$20,000.00
General Cost Total:	\$30,000.00	\$30,000.00

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



Route for approval.

