

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.

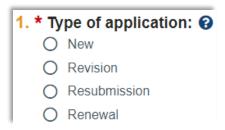
From the MyFunding tab select Create Funding Proposal.



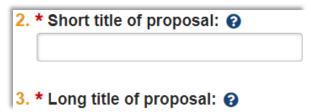
Questions that are required will be preceded by a red asterisk. Help for each item can be found by selecting the question mark icon that follows each.

The General Proposal Information SmartForm

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



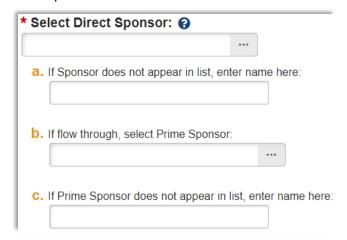
2. Enter a Short and Long Title.



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.



4. Enter Sponsor data.



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.



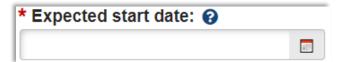
Will this originate from a Federal Contract or Other Transaction Agreement(OTA)?

○ Yes ○ No Clear

6. Disclose the Primary Purpose of the Project.



7. Enter the Expected Start Date.



8. Indicate this is not a limited submission.

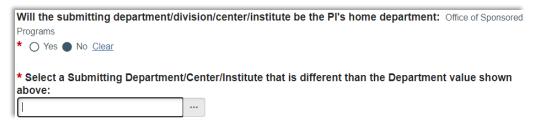


The Personnel SmartForm

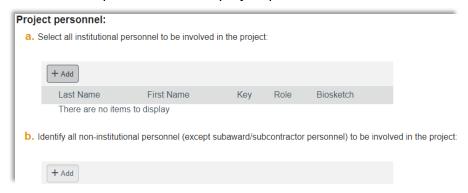
1. Indicate if this is a multi-PI submission. Answer in the affirmative if more than one individual has the role of Principal Investigator in the project. All participants with the role of Principal Investigator will need to complete the PI Certification.



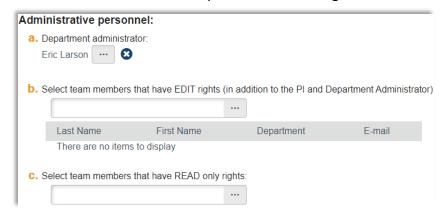
2. Review the defaulted value of the department responsible for the submission. If a change is necessary, answer No and enter the department responsible.



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



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

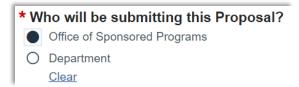


The Submission Information SmartForm

1. Enter "Fee for Service" as the Opportunity ID.

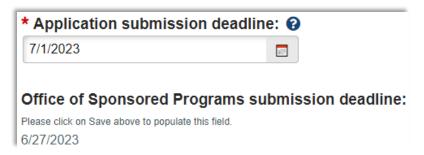


2. Indicate Office of Sponsored Programs will be submitting this proposal.



The Budget Periods and Key Dates SmartForm

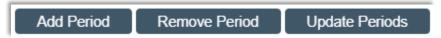
1. Enter a date by which this agreement should be finalized as the Application submission deadline.



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



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.



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: 😯	Yes No Clear
* Vertebrate Animals: 🔞	
* Hazardous Materials: 🔞	
* Human Stem Cells: 🔞	
* Human Fetal Tissue: 🔞	
* Regional Biocontainment	Lab: ? O Yes 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

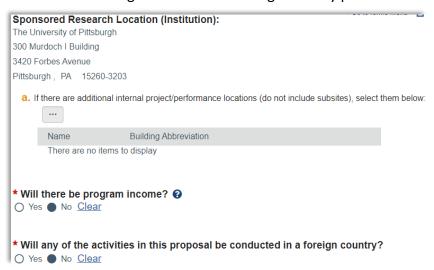
3. Indicate if Controlled Unclassified Information (CUI) be generated or handled under this project.

* Will Controlled Unclassified Information (CUI) be generated or handled under this project? ②

Yes O No Clear

The Additional Proposal Information SmartForm

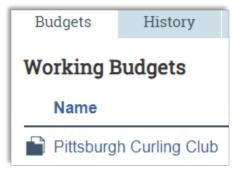
1. Review the Sponsored Research Location, indicate if there will be program income, and if activities are being conducted in a foreign country provide them.



Review the Completion Instructions and click Finish

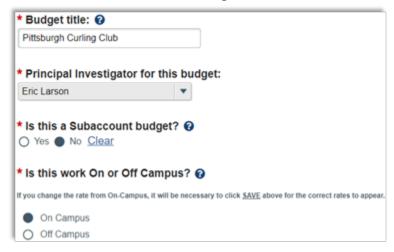
The General Budget Information SmartForm

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

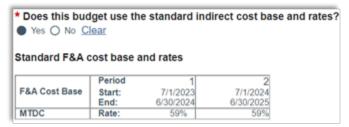


2. Complete the General Budget Information SmartForm.

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.



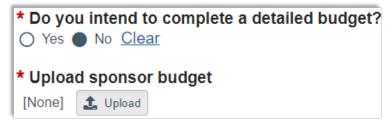
4. Does this budget use the standard indirect cost base and rates? The rate pulled into your budget is determined by the type of project selected on the Funding Proposal General Proposal Information SmartForm. If this rate is correct indicate Yes.



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.



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



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.



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



The Personnel Cost Definition SmartForm

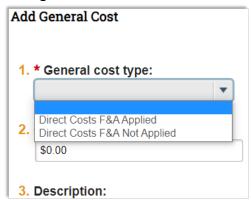
1. When preparing a non-detailed budget this SmartForm can be bypassed.

The Personnel Costs SmartForm

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

The General Cost Definition SmartForm

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.

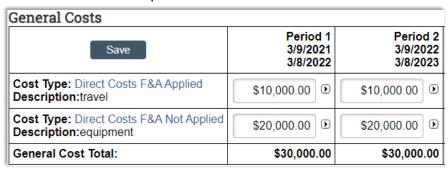


2. Select OK to add the budget items.



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.



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.

