C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

 To provide instructions on how to fill out the Child Request Form.

This applies to Departmental Administrators, Parent Project PI, Child Project PI, Child Project Chairman, SPAC and SPA.

Link to form

[DocuSign](#)

- **Filling out the form**

PowerForm Signer Information

Form: UMB - SPAC Child Project Request

Fill in the name and email for each individual area listed below. All individuals entered will receive an email letting them know when they are required to complete, review and/or sign the document. When you have completed the form, click the FINISH button to route the form to the next area.

Please enter your name and email to begin the signing process.

Departmental Administrator Name & eMail

Your Name: *

Full Name

Your Email: *

Email Address

Please provide information for any other signers needed for this document.

Parent Project PI Name & eMail

Name: *

Full Name

Email: *

Email Address

Instruction on Filling Form

Departmental Administrator

(Or person filling out the form)

Full name & email address

You will receive and email to fill in all of the required fields on the form

Fill in Parent Project

PI full name & email address

Required approver

Child Project PI Name & eMail

Name: *

Full Name

Email: *

Email Address

Child Project Chair Name & eMail

Name: *

Full Name

Email: *

Email Address

BEGIN SIGNING

<u>Departmental Administrator (cont.)</u>

Fill in Child Project PI Name and email address

Required Approver

Fill in Child Project Chair Name and email address

Required Approver

Hit "Begin Signing" to submit your form for signatures

Those listed by name above will receive an email similar to the one below in the order of the required actions:

1st - **Departmental Administrator** or designee to complete the form

2cd- **Parent Project PI** for signature approval

3rd – **Child Project PI** for signature approval

4th - **Child Project Chair PI** signature approval

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

Departmental Administrator

UNIVERSITY
of MARYLAND
BALTIMORE

Review and Sign Document

REVIEW DOCUMENT

SPAC Team
noreply@umaryland.edu

Dear Laura O Scarantino,

You are receiving this email because you created a DocuSign form that needs to be completed before it can be submitted to the Parent Project PI for approval.   Please complete the form by clicking on the View Document link above.

Thanks
SPAC Department

When you click into **REVIEW DOCUMENT** on your email

And then choose **CONTINUE** on the header

CONTINUE   **FINISH LATER**   **OTHER ACTIONS ▼**

Use the Finish Later option to continue signing this document at a later time. Learn more...

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

This will take you into the form. You will be required to fill the red highlighted boxes in order for the form to move forward for its first approval.   The form will not submit if all fields are not filled in. Once you have completed the 2 pages, hit the **FINISH** button.

Sponsored Projects Accounting and Compliance (SPAC)

CHILD PROJECT REQUEST FORM

PARENT PROJECT INFORMATION			
Parent PI Name		Award #	
		Parent Project #	

INFORMATION FOR CHILD PROJECT SET UP				
Project PI Name				
School	-- select --			
Department				
Project Title				
Period of Performance	Start Date		End Date	
Activity Type	☐ Research ☐ Other Sponsored Activity ☐ Fellowship (Pre) ☐ Services ☐ Clinical Trial ☐ Fellowship (Post) Note: If the activity type is different from the parent, please provide an explanation of the work being performed under "Remarks" on page 2.			

CONTACT INFORMATION	
Department Administrator/Account Mgr.	
Telephone Number	
Email	

OTHER INFORMATION		
Quantum Owner Department Code (Child)		
Will this involve a sub-award to another organization?	○ Yes ○ No	
☐	Committed Cost Share CCS SOAPF Code	
☐	Over the Salary Cap Cost Share	SPAC Team -- select - ∨

Prepared by: Laura O Scarantino   **Date Submitted:** 7/19/2021

NOTE FOR SPAC TEAM CHOICE: IT DEFAULTS TO SETUP

1. This form will automatically route to the setup team
2. No need to make a choice

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

Sponsored Projects Accounting and Compliance (SPAC)

CHILD PROJECT REQUEST FORM

BUDGET INFORMATION

Total Amount of Funds for Child Project	$	
Quantum Project Number to be Decreased:		

Object Amount		Object Code/Description
$	From	-- select --
	To	-- select --
$	From	
	To	
$	From	
	To	
$	From	
	To	
$	From	
	To	
$	From	
	To	
$ 0.00	Total Object Amount Entered	

NOTE: When applicable, include changes that affect the F&A budget category (examples: transfer of funds to purchase equipment or to enter into a sub-recipient agreement).

If more than 6 budget changes required, please upload an excel spreadsheet that include the necessary information that is shown above.

Optional

REMARKS:

Optional

** **SPAC Office Use** **

New Award Number: **New Project Number:**

SPAC Approver: **Date:**

SPA Team:

Last Updated 11-04-19

AC Child Project Request Form.docx   2 of 2

FINISH

******You can (optional) download or print a copy of the document that you filled out or close****

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

Save a Copy of Your Document

Your document has been signed

If you would like a copy for your records, select Download or Print and save.

DOWNLOAD   PRINT   CLOSE

Department Admin – you are done for now

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

<u>PARENT PI/CHILD PI OR CHILD PROJECT CHAIR</u>

SPAC Team
noreply@umaryland.edu

Dear Laura O Scarantino,

You are receiving this email because your Department Administrator has requested the transfer of funds to create a new Child Project. Please review the adjustments and approve by clicking on the View Document link above.

Thanks
SPAC Department

When you click into **REVIEW DOCUMENT** on your email
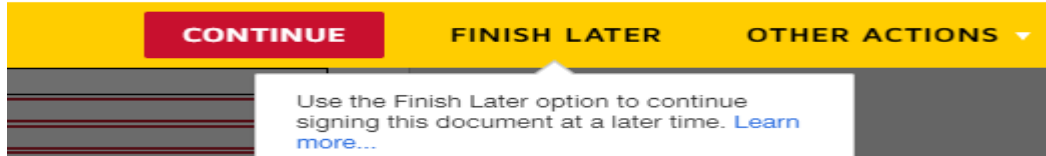
And then choose **CONTINUE** on the header

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
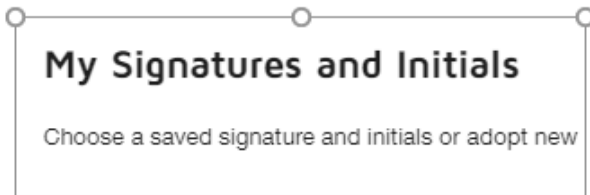Approval Date: 07/21/2021
Link:

CONTINUE FINISH LATER OTHER ACTIONS ▾

Use the Finish Later option to continue
signing this document at a later time. Learn
more…

This will take you to the required signatures page. Of course you should review before you sign.

• That I am not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded
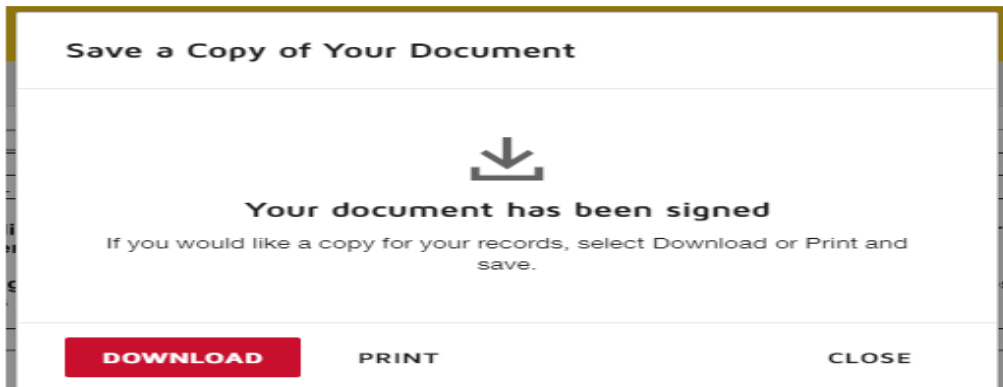 from current transactions by any Federal department or agency.

REQUIRED SIGNATURES				
Parent Project PI	Sign ↓		Date	7/19/2021

Sign ↓

When you hit the [Sign ↓] button, a box will pop up with My Signatures and Initials. You would either use a saved signature or adopt a new one

My Signatures and Initials

Choose a saved signature and initials or adopt new

AC Child Project Request Form.docx   2 of 2

FINISH

******You can (optional) download or print a copy of the document that you filled out or close****

Save a Copy of Your Document

↓

Your document has been signed

If you would like a copy for your records, select Download or Print and save.

DOWNLOAD   PRINT   CLOSE

<u>PI or Chair you are done for now!</u>

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
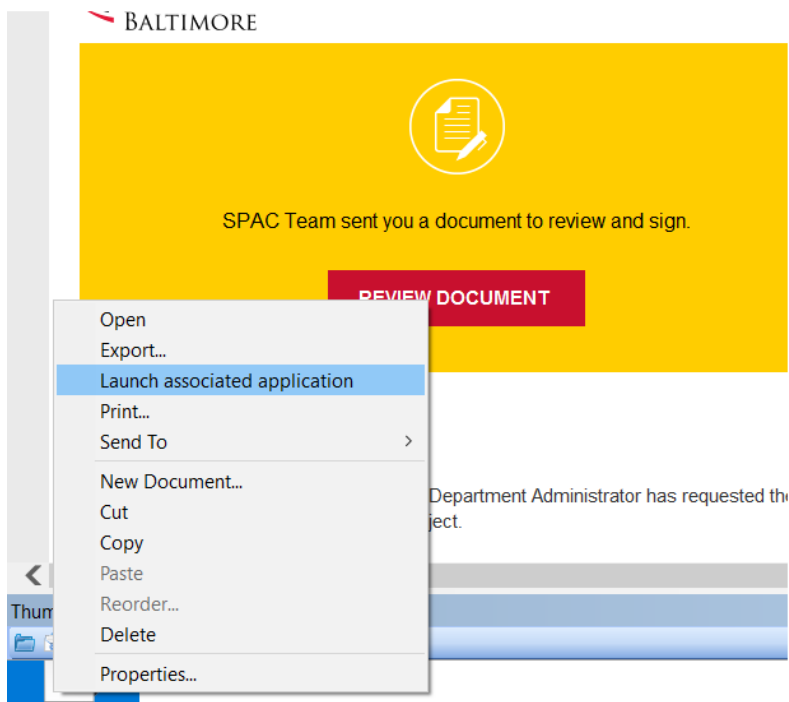Approval Date: 07/21/2021
Link:

SPAC SETUP TEAM

 SPAC setup team will receive an email in their inbox. This email will automatically move to the setup team workflow.

Once you open the docSign document in ImageNow, you can right click the page icon on the thumbnail pane, then choose "Launch associated program" as shown below.

Sign onto your DocuSign Account

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

You will then perform the action of creating the child project per the instructions provided on the form. Once completed, scroll to the bottom of the form and fill in the award # and project number and click on the SPAC Approver "sign" line to sign the form

** **SPAC Office Use** **

New Award Number: [   ] **New Project Number:** [   ]

SPAC Approver: [Sign ⬇]   **Date:** 7/26/2021

SPA Team: Team Auga

Last Updated 11-04-19

And then click the [**FINISH**] button.

Make sure that before you send the DocuSign file to WFE that you fill in the properties for the child setup, if it was not already filled in during the transfer to Account Maintenance workflow

Name
321Z57T_04FMZB2S9000137

Award # (old PS PID)
hild Project Request for your Review an

Description
dse_NA3@docusign.net

Notes
0

Date of Email
2021-07-26 16:57:26

Email From
hild Project Request for your Review an

Document Type
FS_RF Correspondence

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

When SPAC hits the "finish" button, a copy of the document goes to Team-Aqua in SPA and is copied out to everyone who was a signer on the document. Those who signed on the document will receive the following email.

Mon 7/26/2021 4:57 PM

DocuSign NA3 System <dse_NA3@docusign.net>

Child Project Request for your Review and Signature for Laura O Scarantino

To ☐ RS-SPAC Team Red

📄 SPAC Child Project Request Form.docx.pdf ▾   📄 Summary.pdf ▾
340 KB   143 KB

Phish Alert

UNIVERSITY of MARYLAND BALTIMORE

Your document has been completed

VIEW COMPLETED DOCUMENT

SPAC Team
noreply@umaryland.edu

All parties have completed Child Project Request for your Review and Signature for Laura O Scarantino.

Dear Laura Scarantino,

C1: Sponsored Research Accounting and Compliance (SPAC)
C2: Setup Team
C3: Procedure to Child Project Request Form
Approval Date: 07/21/2021
Link:

You are receiving this email because the Departmental Administrator has submitted a
Child Request Form and you are a required approver. Please enter the form through
the review document button above. If you are in agreement, please sign the form. If
you have any questions about this transfer of funds, please contact the Department
Administrator listed on the form.

Thanks
SPAC Department

END OF INSTRUCTIONS

Once the form is filled out and submitted, the requestor will receive an email prompting them to
review. Once reviewed and closed, the form will continue along the routing process so that all parties
can view the status.

To track the status, you must have:

1) A DocuSign account.
2) Must use a umaryland.edu email address.