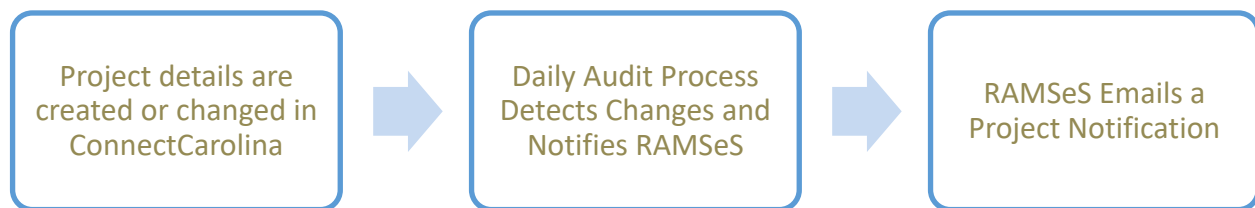


# Project Notifications Guidance

## SPONSORED PROJECT NOTIFICATION EMAIL PROCESS

Effective August 11, 2020, a **new process**, [Sponsored Project Notifications](#), released to keep UNC research teams informed on changes made to PS Project IDs (PSIDs) and help improve the experience of managing sponsored projects. These new Project Notifications replace existing “New” and “Preliminary” RAMSeS PSID notifications.

The Project Notification process runs when a new PSID for a funded project or Financial Guarantees/Letter of Guarantees (LOGs) has been created, and/or when changes are made to existing PSIDs in ConnectCarolina. Emails from RAMSeS will be generated by scheduled tasks run every morning at 8:30 AM based on changes of information in ConnectCarolina. Attached to each email will be the corresponding Sponsored Project Notification attachment, which will also be uploaded to the Award Project Attachments tab in RAMSeS.



## USERS RECEIVING SPONSORED PROJECT NOTIFICATIONS

For each PSID, users with the following roles in RAMSeS will receive the relevant PSID notifications:

- **Principal Investigators** (Award and Project)
- **Primary Award Contact**
- **PS Project ID Managers** (Award and Project)
- **OSR Sponsored Projects Accountant** (or Team Manager)

## TYPES OF SPONSORED PROJECT NOTIFICATIONS

### NEW PSID Created on a Funded Project:

- New prime/subaccount PS Project ID
- New subagreement PS Project ID

### NEW PSID Created on LOG:

- New LOG PS Project ID\*

**\*NOTE:** For subagreementt PSID’s indicated on LOG, the Sponsored Project Notification attachment will be uploaded for reference to the Award Project Attachments tab, but no email will be triggered.

### CHANGE to an Existing PSID:

- Change to a prime/subaccount PS Project ID
- Change to a subagreement PS Project ID

# Project Notifications Guidance

## TYPES OF CHANGES GENERATE SPONSORED PROJECT NOTIFICATIONS

- **Change in PI**
- **Change in Project Date**
- **Change in Budget**
  - Includes clinical trials, program income and income, and Billing Per Unit (BPU) projects
  - \***NOTE:** *Budget notifications will not include Lapsed Funds (559510)*

## SPONSORED PROJECT NOTIFICATION ATTACHMENT (Appendix Sample #1-3)

Each attachment will have the following sections with information on that PSID:

- **Project Information** – data from ConnectCarolina (see acronyms used for Project Type & F&A Rate)

Project Type	Full Description
SARRA	State (NC)-ARRA
STATE	State (NC)
INDFD	Indirect Federal
N-PFT	Nonprofit
NARRA	Nonprofit-ARRA
FED	Federal
FARRA	Federal-ARRA
IARRA	Indirect Federal-ARRA
OTHER	Other
INCME	Income
FARPR	Federal-ARRA CNV
FDSPR	Federal-Student Aid CNV
N-PPR	Nonprofit CNV
NARPR	Nonprofit-ARRA CNV
STAPR	State (NC) CNV
LOG	Letter of Guarantee
FEDPR	Federal CNV
OTHRP	Other CNV
IFDST	Indirect Federal-State (NC)
IND	Industry
INTST	Interest
STTFR	State-Transfer In (NC)
INFPR	Indirect Federal CNV
FEDSA	Federal-Student Aid
IARPR	Indirect Federal-ARRA CNV
INDPR	Industry CNV

FA Rate Type	Full Description
OR	On Campus - Organized Research
OFC	Off Campus Adjacent - 10 Mile Radius
ONC	On Campus
INSTR	On Campus - Instruction
CTF	On Campus - Clinical Trials Federal
CTN	On Campus - Clinical Trials Non-Federal
OFR	Off Campus Remote
OSA	On Campus - Other Sponsored Activities
CTNO	Off Campus - Clinical Trials Non-Federal
CTFO	Off Campus - Clinical Trials Federal
INSTO	Off Campus - Instruction
DOE	Department of Education - Restricted Rate
OSAO	Off Campus - Other Sponsored Activities
NEG	GA Negotiated Rate
ORO	Off Campus - Organized Research

- **Transaction Details**
  - [NEW Project] or [Budget Update, PI Update, or Project Date Update – combo of any or all]
- **Budget Information**
  - LOG, clinical trial, income/interest, and IDIQ projects, budget info is NOT reported/displayed
- **Chart Field**
- **Project Team**

# Project Notifications Guidance

## SAMPLE 1: NEW PS Project ID Created on a Funded Project



RESEARCH

### SPONSORED PROJECT NOTIFICATION

Date of Change Report: 07/17/2020

1

#### Project Information

2

Project ID	5216822	Budget Period	07/10/2020 - 07/31/2022
Project Title	TEST - SAS NP 04.B	Project Dates	07/10/2020 - 07/31/2022
Project Dept	318300-Chemistry	F&A Base Rate	MTDC-55.5%
Project Type	IND	F&A Rate Type	OR
Award	A18-1483-005	Award PI	Mooney,Sandra Marie
Award Title	TEST - SAS NP.04B SPT 7/16	Sponsor	8244-Eli Lilly and Company
		Sponsor Award #	
Admin Dept	318300-Chemistry		

#### Transaction Details

3

Type of Action	NEW Project		
Total Funding	\$200,000.00	Funding This Action	\$200,000.00

#### Budget Information

4

Account Category	Previously Funded	Total Funded
Salaries	\$0.00	\$50,000.00
Fringe Benefits	\$0.00	\$25,000.00
Supplies	\$0.00	\$10,000.00
<b>Total Direct Costs</b>	<b>\$0.00</b>	<b>\$85,000.00</b>
<b>Total Indirect Costs</b>	<b>\$0.00</b>	<b>\$50,000.00</b>
Restricted Funds	\$0.00	\$65,000.00
<b>Total Direct and Indirect</b>	<b>\$0.00</b>	<b>\$200,000.00</b>
<b>Total Costs</b>	<b>\$0.00</b>	<b>\$200,000.00</b>

#### Chart Fields

5

Fund	Source	Department	Project BU	Project	Activity
25210	49300	318300	CHOSR	5216822	1

#### Project Team

6

Team Member	Role	Dates
Mooney,Sandra Marie	PI	07/10/2020 - 07/31/2022
REDINBO,MATTHEW R	INVEST	07/10/2020 - 07/31/2022

- 1 Date the change was made in ConnectCarolina (will be one day prior than date of RAMSeS email)
- 2 Award details from ConnectCarolina
- 3 Action taken in the system. Example lists **New Project** ID created. *Total Funding* is sum of direct and indirect budget on the project. *Funding this Action* is budget amount loaded with this transaction.
- 4 Budget lines loaded on the project for each account category
- 5 Chartfield for Project ID listed in the Project Information
- 6 List of Lead PI, PI, and/or Investigators on the project.

# Project Notifications Guidance

## SAMPLE 2: NEW PS Project ID Created on a Financial Guarantee (LOG)



RESEARCH

### SPONSORED PROJECT NOTIFICATION

Date of Change Report: 07/16/2020

1

## FINANCIAL GUARANTEE / LETTER OF GUARANTEE

### Project Information 2

<b>Project ID</b>	5216823	<b>Project Dates</b>	07/10/2020 - 07/31/2021
<b>Project Title</b>	TEST - SAS NP.03B	<b>F&amp;A Base Rate</b>	MTDC-55.5%
<b>Project Dept</b>	635200-UNC Inst for the Environment	<b>F&amp;A Rate Type</b>	OR
<b>Project Type</b>	N-PFT	<i>*No expenditures will be billed to the sponsor until award established.</i>	

### Transaction Details 3

<b>Type of Action</b>	Letter of Guarantee (LOG) Project ID Created
-----------------------	--

### Chart Fields 4

Fund	Source	Department	Project BU	Project	Activity
25210	49500	635200	CHOSR	5216823	1

### Project Team 5

Team Member	Role	Dates
Mooney,Sandra Marie	PI	07/10/2020 - 07/31/2021

- 1 Date the change was made in ConnectCarolina (will be one day prior than date of RAMSeS email)
- 2 Project details from ConnectCarolina
- 3 Action taken in the system. Example lists **LOG Project ID** created.
- 4 Chartfield for Project ID listed in the Project Information
- 5 List of Lead PI, PI, and/or Investigators on the project.

# Project Notifications Guidance

## SAMPLE 3: CHANGE to Existing PS Project ID



RESEARCH

### SPONSORED PROJECT NOTIFICATION

Date of Change Report: 08/03/2020

1

#### Project Information 2

<b>Project ID</b>	5116040	<b>Budget Period</b>	12/01/2019 - 10/31/2020
<b>Project Title</b>	WOODS HOLE Provide Exchange	<b>Project Dates</b>	12/01/2019 - 10/31/2020
<b>Project Dept</b>	428601-Neuroscience Center	<b>F&amp;A Base Rate</b>	TDC-15%
<b>Project Type</b>	N-PFT	<b>F&amp;A Rate Type</b>	OSA
<b>Award</b>	A20-0637-001	<b>Award PI</b>	Itano,Michelle Sumako
<b>Award Title</b>	WOODS HOLE Provide Exchange of Experience Between Core	<b>Sponsor</b>	33259-The Chan Zuckerberg Initiative
<b>Admin Dept</b>	428601-Neuroscience Center	<b>Sponsor Award #</b>	2019-206993 (5022)
		<b>Primary Sponsor</b>	23472-Silicon Valley Community Foundation

#### Transaction Details 3

<b>Type of Action</b>	Budget Update	<b>Funding This Action</b>	\$803.00
<b>Total Funding</b>	\$5,803.00		

#### Budget Information 4

Account Category	Previously Funded	Amount Funded	Total Funded
Travel Domestic	\$4,348.00	(\$48.00)	\$4,300.00
Supplies	\$0.00	\$48.00	\$48.00
<b>Total Direct Costs</b>	<b>\$4,348.00</b>	<b>\$0.00</b>	<b>\$4,348.00</b>
<b>Total Indirect Costs</b>	<b>\$652.00</b>	<b>\$0.00</b>	<b>\$652.00</b>
Restricted Funds	\$0.00	\$803.00	\$803.00
<b>Total Direct and Indirect</b>	<b>\$5,000.00</b>	<b>\$803.00</b>	<b>\$5,803.00</b>
Cost Share	\$0.00	\$0.00	\$0.00
<b>Total Costs</b>	<b>\$5,000.00</b>	<b>\$803.00</b>	<b>\$5,803.00</b>

#### Chart Fields 5

Fund	Source	Department	Project BU	Project	Activity
25236	49200	428601	CHOSR	5116040	1

#### Project Team 6

Team Member	Role	Dates
Itano,Michelle Sumako	PI	12/01/2019 - 10/31/2020

- 1 Date the change was made in ConnectCarolina (will be one day prior than date of RAMSeS email)
- 2 Award details from ConnectCarolina
- 3 Action taken in the system. Example lists **Budget Update**. *Total Funding* is sum of direct and indirect budget on the project. *Funding this Action* is budget amount loaded with this transaction.
- 4 Budget lines loaded/revised on the project for each account category
- 5 Chartfield criteria for Project ID listed in the Project Information
- 6 List of Lead PI, PI, and/or Investigators on the project.