HOW AN AWARD NOTICE BECOMES AN ESTABLISHED PROJECT AND ACCOUNT

AAS ET STRUCTURE

Lesley Bell
Associate Executive Director

Tamara Lopez
Assistant Director
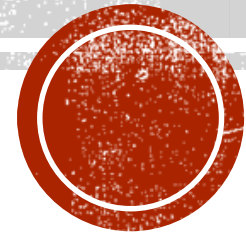
TAMU, HSC, TAMUG	TEES, TTI	AgriLife, Regionals
Award Set-Up	**Brooke Schneider** Team Lead	**Mandy Martinez** Team Lead
Award Set-Up	Award Set-Up	Award Set-Up
Award Set-Up	Award Set-Up	Award Set-Up
Award Intake	Award Intake	Award Intake
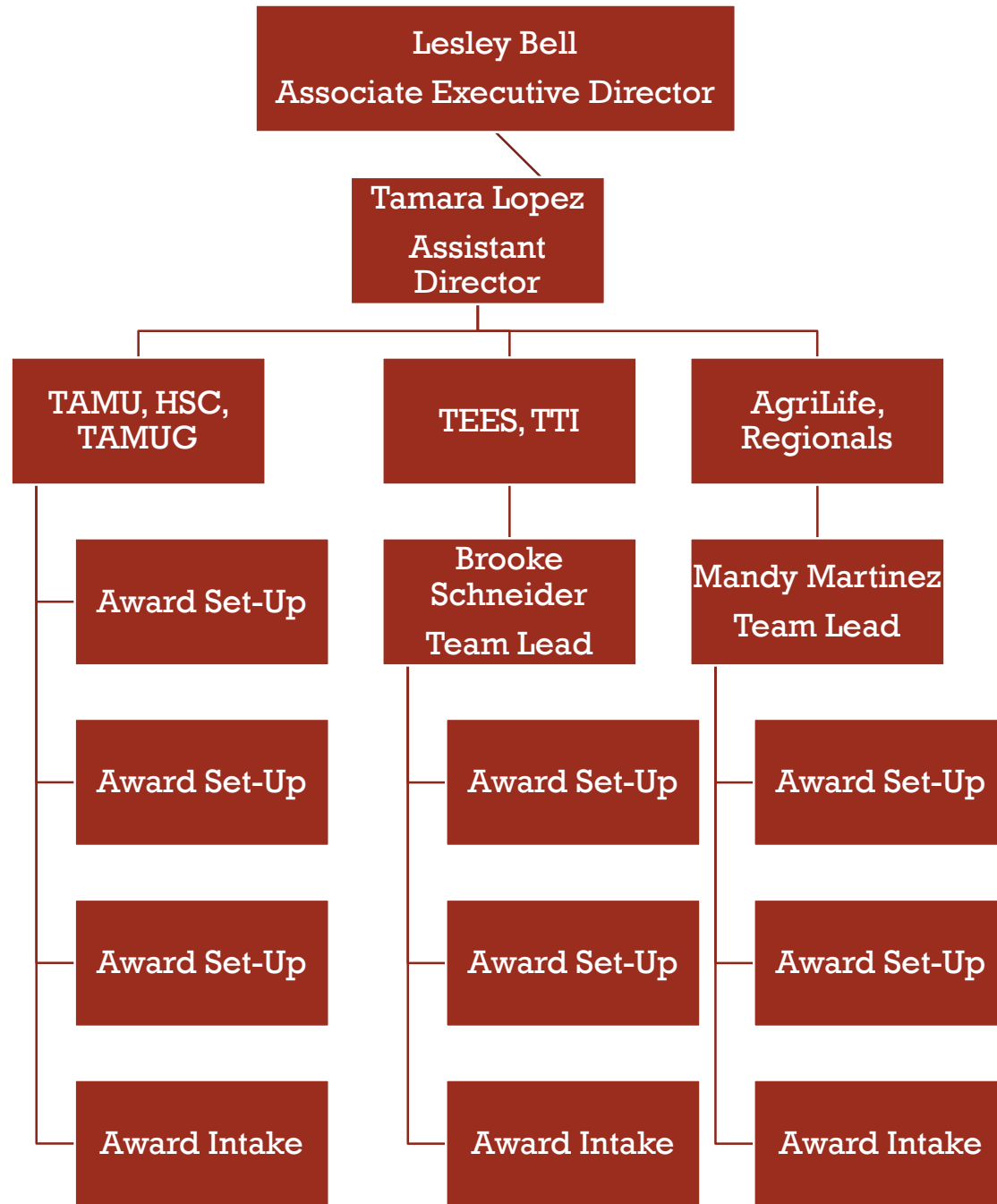
AWARD AND ACCOUNT SET-UP AND EXPEDITING TEAM (AASET) STRUCTURE

Award Intake
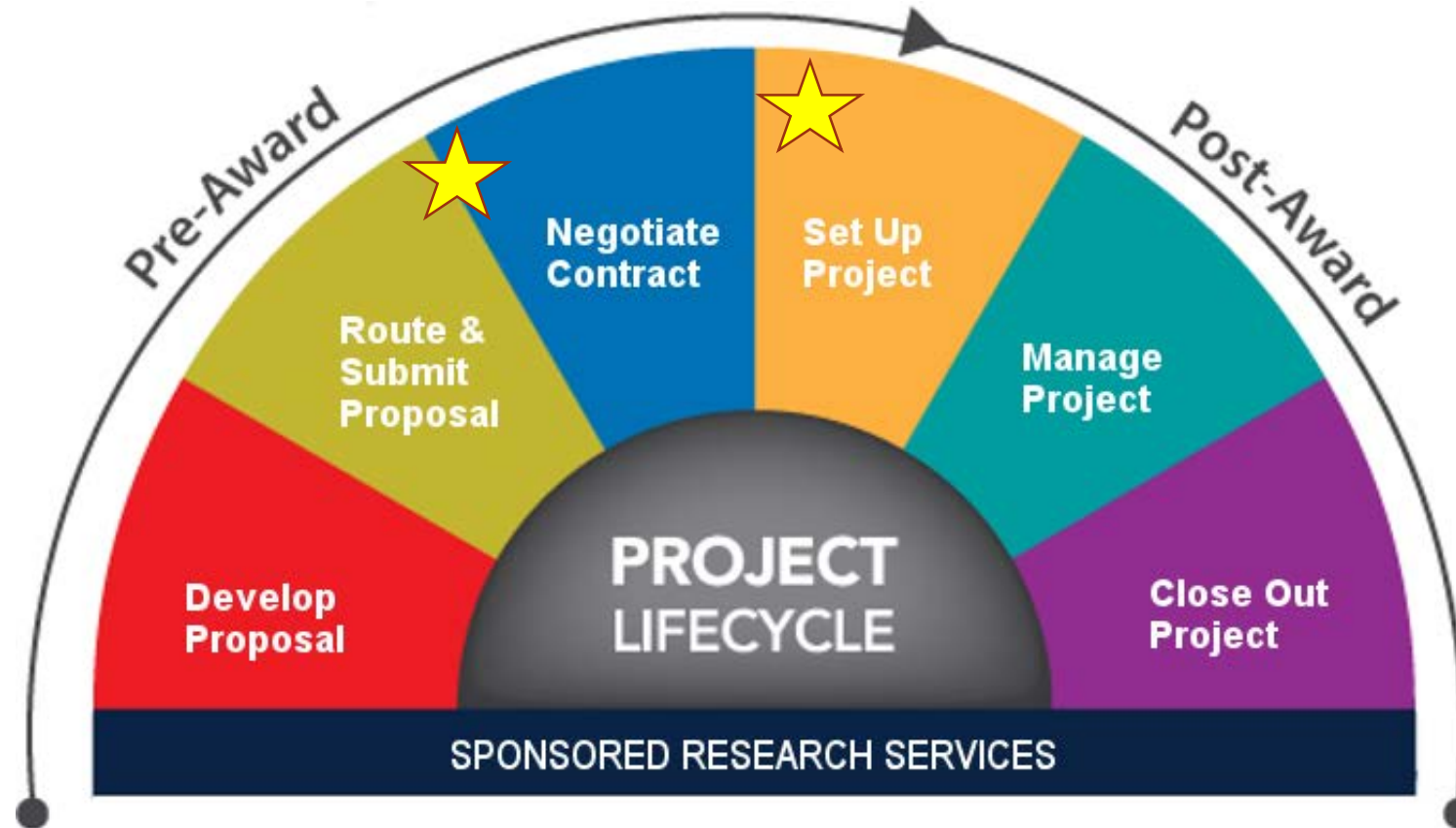
- Manage the awards inbox (awards@tamu.edu)

- Process "internal" proposals and proposal revisions related to awards

- Initiate the process using Maestro for award negotiation and/or setup

Award Set-Up

- Setup Maestro project record
  - Project Personnel
  - Performance Dates
  - Deliverables
  - Terms & Conditions
  - Verify Compliance Approvals

- Load funds to FAMIS account(s)
  - Subcode Edits
  - Apply IDC Rates
  - Approved Budget Splits

TAMU, HSC, TAMUG | TEES, TTI | AgriLife Research, AgriLife Extension, and the Regionals

Subject Matter Experts

Cross-Trained

AASET IN THE AWARD LIFE CYCLE

- Missing proposal
  - Internal proposal will need to be logged, routed, and approved in routing before set-up completes

- Compliance protocol approvals not in place
  - Compliance must be in place with appropriate compliance office before set-up completes
  - Exception: Subcode edits to block animal charges can be placed on an account if IACUC protocol approval not yet in place

- Financial Conflict of Interest (FCOI)
  - Need confirmation of list of FCOI investigators from PI
  - All FCOI investigators must have annual training and annual disclosure on file before set-up completes

SPEED BUMPS IN THE SET-UP PROCESS

SPEED BUMP

FINANCIAL CONFLICT OF INTEREST (FCOI)

Maestro Personnel Review Task – new feature in Maestro
Process improvement – planned go-live date of October 1
AASET Intake – tasking feature to kick-off confirmation of FCOI Investigators

CURRENT

- FCOI list of investigators requested via email from the PI

- PI received multiple requests via email for FCOI list, at times
  - Emails crossing across departments
  - Email response unclear to next department
  - Some email templates had a blank chart and only changes entered

FUTURE

- PI to see the actual list of individuals marked as FCOI Investigators from the proposal

- Certification and changes, if needed, recorded by PI in Maestro
  - Better record keeping
  - Audit history
  - Documentation of changes

ACTION HISTORY

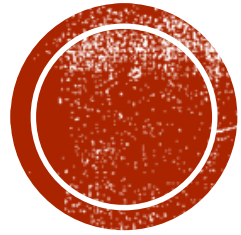## Transparency into the award set-up

◢ Action History

Action ▾   View ▾   ➕   ✖   📗   🧹   📑   ⬚ Detach

Status	Status Start Date	Status Date To	Comments
Setup in Process	04-Aug-2020 11:06:44		
Quality Check	05-Aug-2020 10:09:24		
Setup complete	05-Aug-2020 10:07:39		
To Project administrator for action	05-Aug-2020 08:48:01	05-Aug-2020 09:40:04	8/5: emailed PA on account structure

DATA INTEGRITY

Consistent practices in project and account set-ups
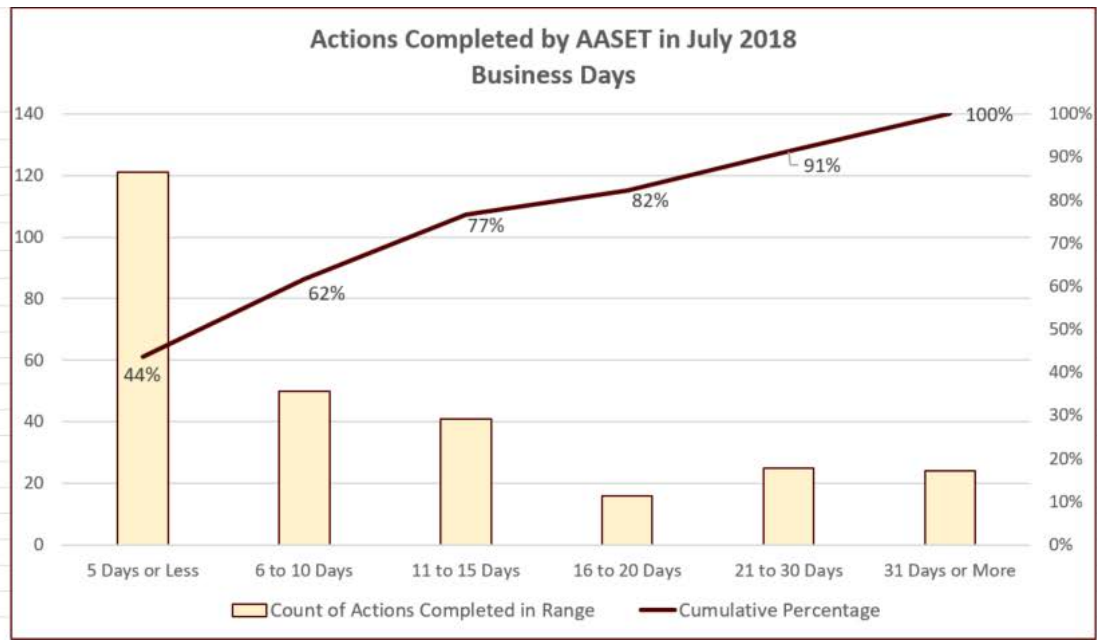
SERVICE LEVEL GOALS & EXPECTATIONS

Award Intake – **24 hour** turnaround initiating the negotiations and/or setup process once award/modification notice received in Awards box

Award Intake – log and start working an internal proposal or proposal revision within **24 hours** of request
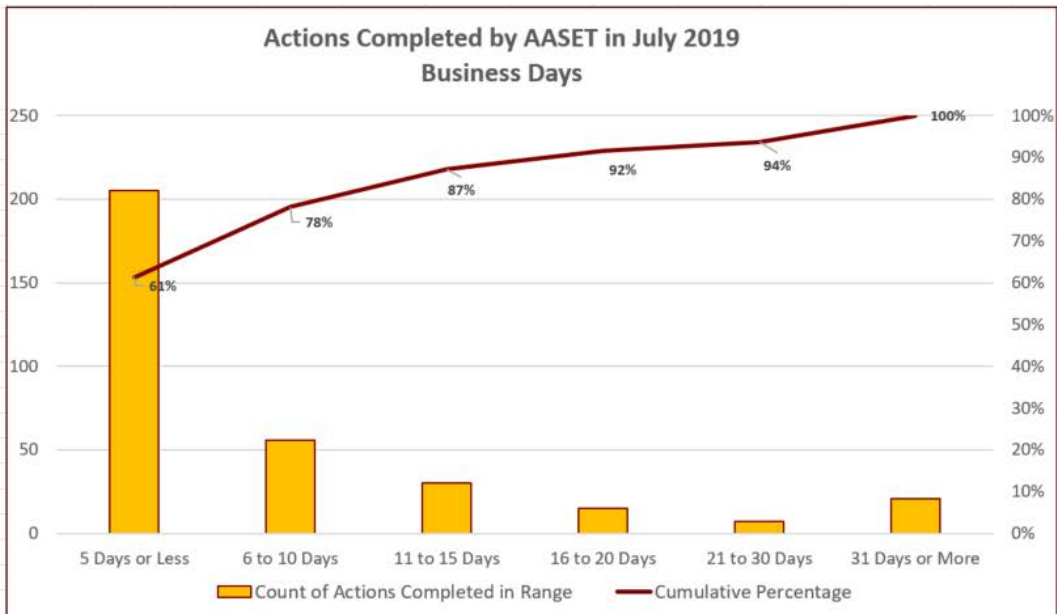
Award Setup – 85% of setups completed within **5 days** of receiving the setup

Jul-18	Count of Actions Completed in Range	Cumulative Percentage	Percentage Completed in Range
5 Days or Less	121	44%	44%
6 to 10 Days	50	62%	18%
11 to 15 Days	41	77%	15%
16 to 20 Days	16	82%	6%
21 to 30 Days	25	91%	9%
31 Days or More	24	100%	9%
Total	277		

Jul-19	Count of Actions Completed in Range	Cumulative Percentage	Percentage Completed in Range
5 Days or Less	205	61%	61%
6 to 10 Days	56	78%	17%
11 to 15 Days	30	87%	9%
16 to 20 Days	15	92%	4%
21 to 30 Days	7	94%	2%
31 Days or More	21	100%	6%
Total	334		

AASET METRICS

AASET METRICS

Jul-19

Jul-19	Count of Actions Completed in Range	Cumulative Percentage	Percentage Completed in Range
5 Days or Less	205	61%	61%
6 to 10 Days	56	78%	17%
11 to 15 Days	30	87%	9%
16 to 20 Days	15	92%	4%
21 to 30 Days	7	94%	2%
31 Days or More	21	100%	6%
Total	334		

Actions Completed by AASET in July 2019 Business Days

Count of Actions Completed in Range — Cumulative Percentage

Jul-20

Jul-20	Count of Actions Completed in Range	Cumulative Percentage	Percentage Completed in Range
5 Days or Less	228	71%	71%
6 to 10 Days	51	86%	16%
11 to 15 Days	24	94%	7%
16 to 20 Days	8	96%	2%
21 to 30 Days	7	98%	2%
31 Days or More	5	100%	2%
Total	323		

Actions Completed by AASET in July 2020 Business Days

Count of Actions Completed in Range — Cumulative Percentage
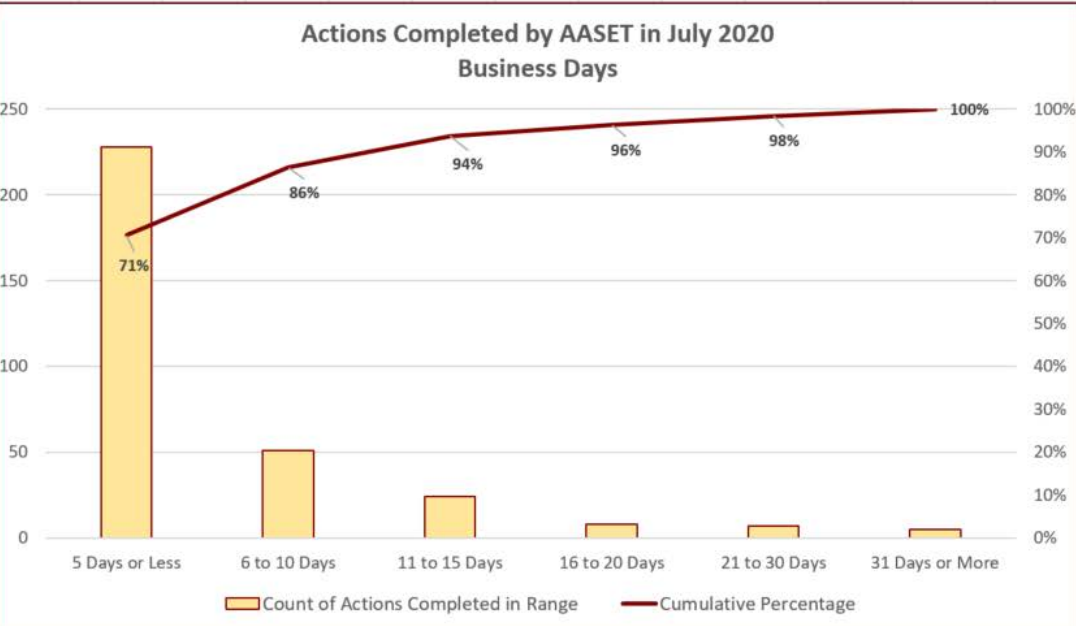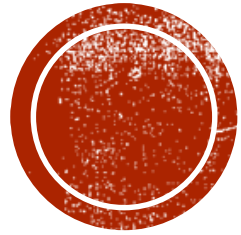
QUESTIONS?

AASET was created with the purpose of expediting award intake and project set-up.