CFAR Pilot Awards-FAQs

1. **Q: How do I get my account set up?**
   A: Please submit all required documentation listed on the Pilot Award checklist to Gabriela Hevia, she will review with Melanie and send to Paulina Massay for processing.

2. **Q: What happens after I've submitted all documentation?**
   A: *Paulina* will send required documentation and initial account request to the Office of Research Administration (*ORA*). It typically takes 1-2 weeks to open the account. If the PI hasn't received the account after 2 weeks, the PI can follow up with Melanie Weiss. Once the account is opened, the PI will be notified by *Paulina*.

3. **Q: What happens after I receive my account number?**
   A: Award Period
   Once the account is opened, the PI will be notified by *Paulina* as soon as it is created. The start date will be the date the account was opened (rounded to the 1st of the month) and the PI will have one year to complete the project (with a possible 1 year no cost extension). Since all the Pilot Awards fall under the CFAR parent grant (which cycles June 1-May 31), all CFAR accounts will end on May 31st of each year, and new account numbers will be requested for June 1st of each year. PI will be notified by *Paulina* as soon as a new account number is created.

   A: Personnel
   Paulina will ask the PI to confirm the personnel and their efforts listed on the approved budget and confirm if personnel has been identified to fill any TBA position. *Paulina* will then work to coordinate with PI's home department to add personnel to the grant. *Paulina* will provide fiscal review and approval for the personnel charges to the account. If any personnel changes (e.g. change in effort, add/remove personnel from project, etc.) are needed throughout the project, please contact *Paulina.* For any other HR related matters (e.g. opening a position to fulfil the TBA personnel on approved budget, bi-weekly timecard approval, etc.), please contact PI's home department to initiate and submit to HR for processing.

   A: Subcontracts/Consortium (excludes service agreements)
   If there is a subcontract listed in the approved budget, *Paulina* will ask PI to confirm the scope of work, budget, budget justification, and contact information for the subcontract site PI and their Administration. *Paulina* will submit the outbound subcontract request to *ORA*.

4. **Q: How do I order supplies/materials/services?**
   A: The account will be set up for the PI in Ariba within a week of the account being opened. All purchases (e.g. lab supplies, IRB fees, publication costs, UM core services, outside services that require a service agreement, etc.) are to be ordered and submitted by PI, PI's lab personnel, and/or PI's home department. *Paulina will* provide review and approval for the charges to the account. For the order to be placed in Ariba, it will be routed for approval by *Paulina, ORA, and University (if any)*. If expense is over $2500, there will be an additional approver. For charges to be paid by IDRs, please email a scanned copy of the IDR to Melanie Weiss for approval and she will return the signed IDR to PI for processing.

5. **Q: Are there any categories within the pilot award that are unallowable?**
   A: Travel, capital equipment and indirect costs are unallowable. Subcontracts on pilot awards also do not allow indirect costs.

6. **Q: How do I set up a petty cash account to pay research subjects?**
   A: Please work with PI home department to set up the petty cash account as they will need to provide a non-sponsored account number as the backup account. Please visit the link below for the UM petty cash policy and steps to set up and manage the account
   http://www.miami.edu/finance/index.php/accounts_payable/disbursements_office/petty_cash/. It is very important to keep good records for petty cash accounts and all replenishments should be completed on a regular basis (recommend monthly) but must be done before the budget period ends each year (May 31).

7. **Q: Who do I contact if I need to submit a rebudgeting or no cost extension request?**
   A: Melanie Weiss can facilitate any approvals needed by the Developmental Core Director.

8. **Q: How will I know the balance of my account?**
   A: *Paulina* will email PI an account update approximately every 2 months. If the PI needs the balance in between regular updates, please contact Paulina. If there is an overdraft in the account, the PI's home department will need to provide a non-sponsored account to transfer the charges.

9. **Q: Who do I contact for assistance with my protocol to submit to IRB or recruitment of research participants?**
   A: Please visit http://cfar.med.miami.edu/. The Miami CFAR Cores can provide assistance in these areas and others, the core services are described on the website. PIs can also reach out to Melanie Weiss and she will put the PI in contact with the appropriate person.

Contact Information:
For financial management, please contact:
Paulina Massay p.massay1@med.miami.edu 305-243-0724

For rebudgeting, no cost extensions, or other questions: CFAR Administration, please contact:
Melanie Weiss, m.weiss11@med.miami.edu, 305-243-3345