

CANCER PREVENTION &
RESEARCH INSTITUTE OF TEXAS

TEXAS TAKES ON CANCER

CGMS GRANTEE TRAINING

October 10, 2012

Topics

- Overview of award lifecycle and associated roles and documents
- Overview of CGMS
- CGMS steps
 - Contract initiation
 - Financial and progress reporting
- Q&A Session

Key Functions of CGMS

- Store and manage grants records
- Report programmatic and financial progress
- Manage changes to grants
- Facilitate communications about grants

Grant Phases

INITIATION



1. Negotiate and finalize required contract documents
 - Scope of work
 - Budget
 - Assurances and certifications

DURATION



1. Execute project
2. Report progress
3. Report financial expenditures
4. Request contract changes

CLOSEOUT



1. Final reporting of progress and financial expenditures
 2. Complete correspondence and requested forms
- ** May still report on IP and revenue after grant closes

User Roles — CPRIT

Grants Manager

Programmatic aspects of grant

Contracts Manager

Contractual aspects of grant

Financial Officer

Financial aspects of grant

User Roles — Grantees

- **PI/PD/CR** — program-specific
 - Responsible for programmatic aspects of project and day-to-day management
- **ASO** — Authorized Signing Official
 - Authority to act on organization's behalf
 - Signature indicates organization's agreement to assume obligations of award

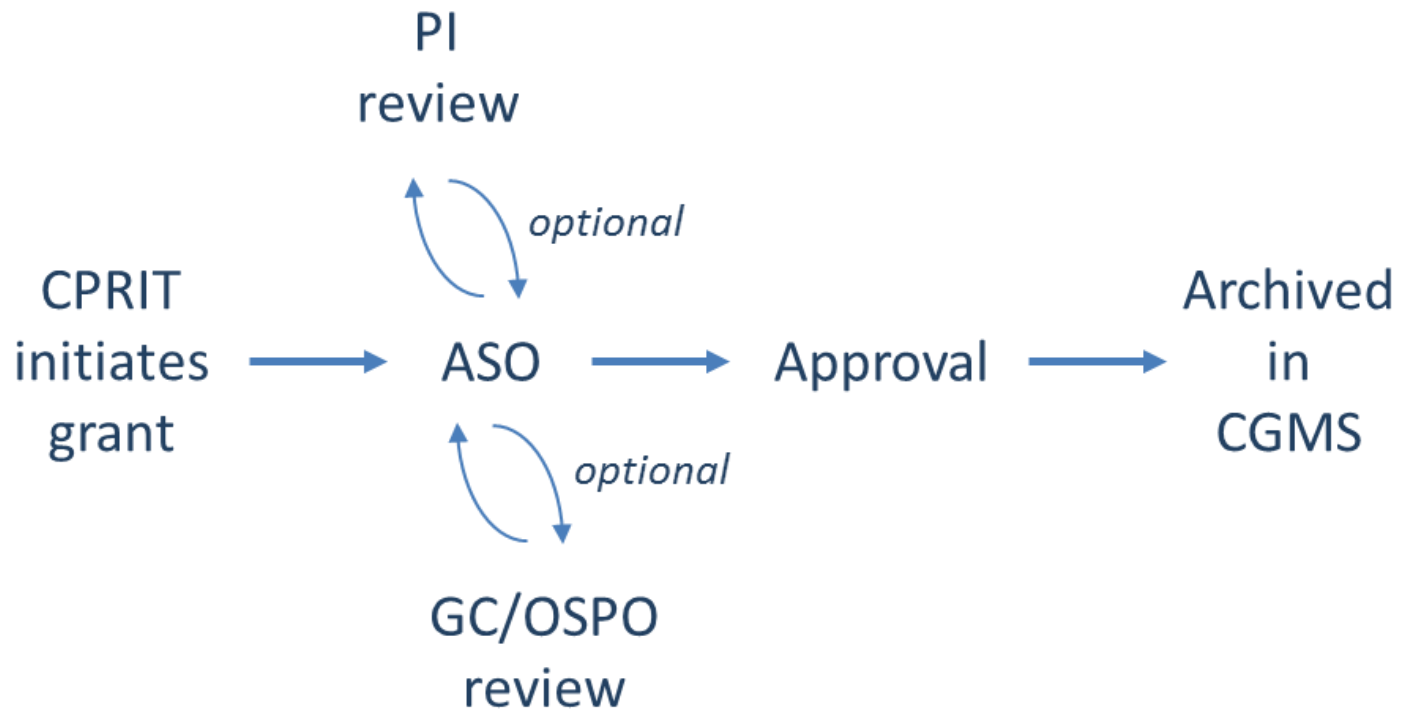
***These roles are required in CGMS*

User Roles — Grantees

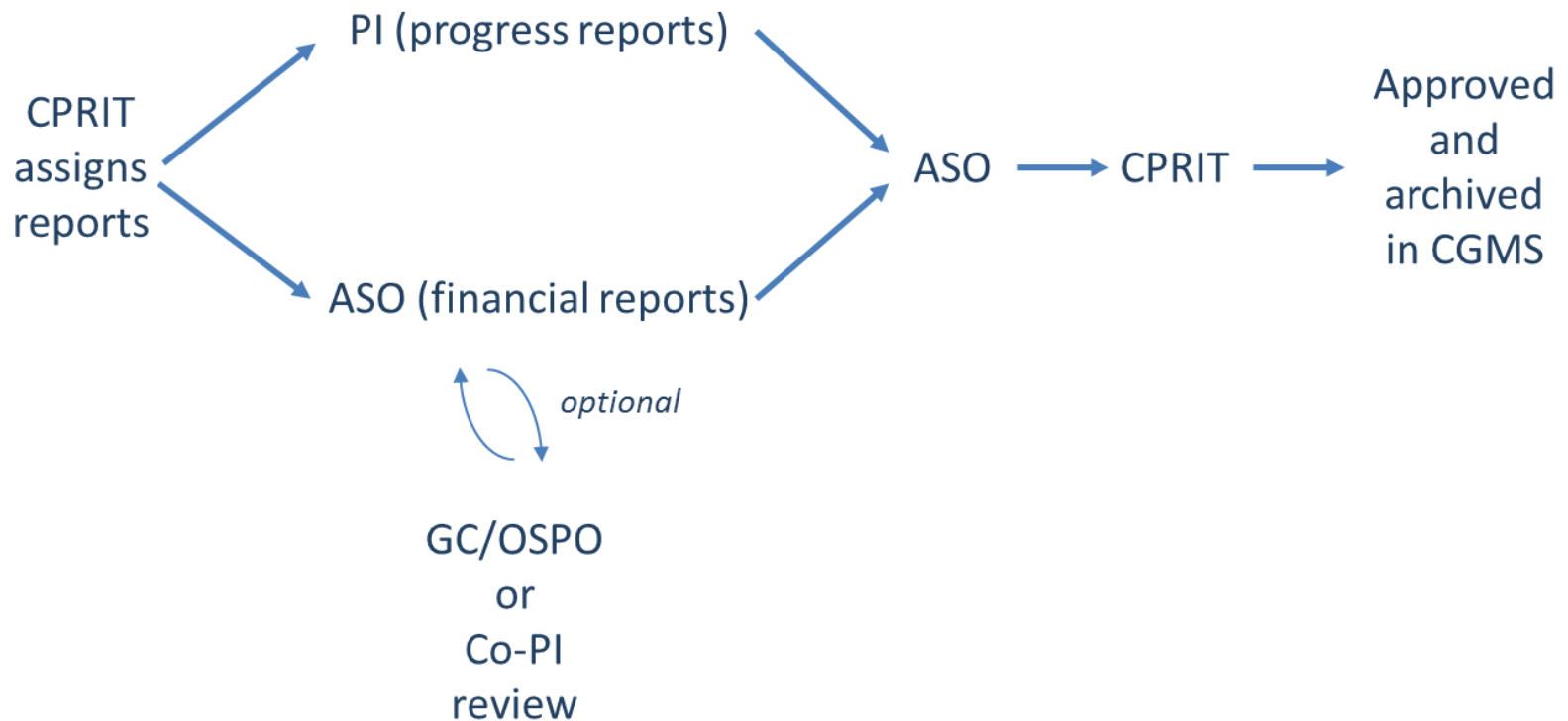
- **Grants Contract/Office of Sponsored Program Official (GC/OSPO)**
 - Manages grant after award is made
- **Co-PI/Co-PD/Co-CR**
 - Assists the PI/PD/CR on the grant
- **Alternate ASO**
 - Acts on behalf of ASO

***These roles are optional in CGMS*

Workflow for Initiation Stage



Workflow for Duration Stage



Contract Initiation Documents

- Base contract
- Attachment A: Approved scope of work
- Attachment B: Approved budget
- Attachment C1: Assurances and certifications
- Attachment C2: Match certification

Contract Initiation Documents

- Attachment D: IP/revenue sharing
- Attachment E: Reporting requirements
- Attachment F: Contract addendum (approved amendments)
- Duplication of Effort and Project Overlap Form

Contract Duration Documents

- Quarterly Financial Status Reports (FSR)
- Progress reports (quarterly, annual, final)
- Annual inventory report form
- HUB form
- Single audit determination form
- Change requests

Closeout and Post-Closeout Documents

- Final FSR
- Final progress reports
- Final annual inventory report
- Final HUB report
- IP report form — may submit after closeout
- Revenue sharing form — may submit after closeout

Key Features of CGMS

- Integration with CPRIT Application Receipt System (CARS)
- To Do list
- Follow status of action items
- Repository of documents and correspondence
- Complete actions through radio buttons
- Complete actions through web forms (enter information in text boxes)
- Password approval-based

Integration with CARS



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To Do List

To Do List

<< first < prev 1 next > last >> 9 total records

Start Date ▲	Grant ID	Required Action	Task	Due Date
28 Aug 2012	RP130000	Complete Web Form	Negotiate Budget	12 Oct 2012
28 Aug 2012	RP130000	Complete Web Form	Negotiate Personnel Level of Effort	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Attachment A	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Base	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Attachment C Part 1	12 Oct 2012
28 Aug 2012	RP130000	Complete Web Form	Matching Compliance Certification (Research Contract Attachment C Part 2)	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Attachment D	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Attachment E	12 Oct 2012
28 Aug 2012	RP130000	Complete Web Form	Duplication of Effort and Project Overlap Form	12 Oct 2012

<< first < prev 1 next > last >> 9 total records

Status of Action Items

Documents & Forms

Assigned Documents & Forms

<< first < prev 1 next > last >> 3 total records

Title ^	Description	Assignee	Type	Confidential	Template	Due Date	Status	Commands
Research Contract Attachment C Part 2	Matching Compliance Certification	Doe, Jane	Contract Document	No		12 Oct 2012	Complete Web Form	Start
Research Contract Attachment D	Intellectual Property and Revenue Sharing	Doe, John	Contract Document	No		12 Oct 2012	Verify Information	View
Research Contract Attachment E	Reporting Requirements	Doe, John	Contract Document	No		12 Oct 2012	Verify Information	View

<< first < prev 1 next > last >> 3 total records

Completed Documents & Forms

<< first < prev 1 next > last >> 1 total records

Title ^	Description	Type	Confidential	Template	Due Date	Status	Commands
Duplication of Effort and Project Overlap Form	Web form requesting information on Duplication of Efforts and Project Overlaps.	Assigned Web Form	No		12 Oct 2012	Approved	View

<< first < prev 1 next > last >> 1 total records

Repository

My Grants [\(Search for Grants\)](#)

<< first < prev 1 next > last >> 6 total records

Grant ID	Grant Title	PI Name	Status	Program	Award Mechanism	FY	Cycle
CP120000	Test COMM for CGMS training guide	Doe, Jane	Active	Commercialization Programs	Company Relocation Awards	2012	1
CP130000	Test Grant (COMM) for CGMS Training	Doe, Jane	Active	Commercialization Programs	Company Formation Awards	2013	1
RP130000	Test Grant 1 for CGMS Training	Doe, Jane	In Early Termination	Research Programs	Individual Investigator Research Awards	2013	1
RP120000	test HHR	Doe, Jane	Active	Research Programs	High-Impact/High-Risk Research Awards	2012	1
PP100000	test PREV	Doe, Jane	Active	Prevention Programs	Evidence-Based Cancer Prevention Services	2010	1
PP130000	Test Prevention Grant for CGMS Training	Doe, Jane	Early Termination	Prevention Programs	Evidence-Based Cancer Prevention Services	2013	1

<< first < prev 1 next > last >> 6 total records

Radio Buttons

Grant Information Contacts Documents & Forms Correspondence Budget & Financial Status Reports Progress Reports

[Back to Documents](#)

Research Contract Attachment D

To review the Contract Document, please click the following link: [Research Contract Attachment D](#).

Verify Information

Please verify that the information provided is correct by entering your password as an electronic signature and selecting the "Verified as Accurate (provide password)" option.

Verified as Accurate (provide password) Verified as Accurate (provide password) and Add Review Step Delegate this Task

Choose the recipient of the next action item for this document. Doe, John ASO ▼

Provide Password for Approval:

No notes available.

Complete Web Form

Budget Summary
Personnel Level of Effort

Personnel Level of Effort

All fields are required

Commands	Senior/Key Person and Other Personnel			Level of Effort (LOE)	Year 1	Year 2	Year 3	Year 4	Year 5	Total Person Months Per Person
	First Name	Last Name	Role on Project							
	Jane	Doe	PI	Type Appt. (months)	<input type="text" value="12"/>	N/A	N/A	N/A	N/A	
				Effort on Project	<input type="text" value="50%"/>	N/A	N/A	N/A	N/A	
				Person Months	6.00	N/A	N/A	N/A	N/A	6.00
Remove Row	<input type="text" value="George"/>	<input type="text" value="Washington"/>	<input type="text" value="co-PI"/>	Type Appt. (months)	<input type="text" value="12"/>	N/A	N/A	N/A	N/A	
				Effort on Project	<input type="text" value="20%"/>	N/A	N/A	N/A	N/A	
				Person Months	2.40	N/A	N/A	N/A	N/A	2.40
To add another new row (after filling in the new row above), click "Save as Draft and Continue Editing" below, then click the "Submit" button				Total Person Months Per Year	8.40	0.00	0.00	0.00	0.00	8.40

*** Provide Justification for Change:**

If no changes were made, please enter "No changes made."

Test

(5,000 chars. limit)

(5,000 chars. limit)

Complete Web Form
Please provide information for all required fields.

Save as Draft and Continue Editing
 Verify Before Submit (provide justification for request)
 Delegate this Task

Choose the recipient of the next action item for this document. Doe, John ASO

Submit

Password Approval

Verify Information

Please verify that the information provided is correct by entering your password as an electronic signature and selecting the "Verified as Accurate (provide password)" option.

Go Back and Change Verified as Accurate (provide password) Verified as Accurate (provide password) and Add Review Step

Choose the recipient of the next action item for this document.

Provide Password for Approval:

No notes available.

Overview of CGMS

- 3 main sections on home page (all grants)
 - My Correspondence
 - To Do List
 - My Grants
- Tab-by-tab view of 7 tabs on Grants page (individual grant)
 - Actions for lifecycle of individual grant

CGMS Home Page



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To Do List

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28 Aug 2012	RP130000	Verify Information	Research Contract Attachment A	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Base	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Attachment C Part 1	12 Oct 2012
28 Aug 2012	RP130000	Complete Web Form	Matching Compliance Certification (Research Contract Attachment C Part 2)	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Attachment D	12 Oct 2012
28 Aug 2012	RP130000	Verify Information	Research Contract Attachment E	12 Oct 2012
28 Aug 2012	RP130000	Complete Web Form	Duplication of Effort and Project Overlap Form	12 Oct 2012

<< first < prev 1 next > last >> 9 total records

My Grants [\(Search for Grants\)](#)


<< first < prev 1 next > last >> 1 total records

Grant ID	Grant Title	PI Name	Status	Program	Award Mechanism	FY	Cycle
RP130000	Test Grant 1 for CGMS Training	Doe, Jane	In Negotiation	Research Programs	Individual Investigator Research Awards	2013	1

<< first < prev 1 next > last >> 1 total records



My Correspondence



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My Grants > [Correspondence](#) > My Correspondence

My Correspondence

My Correspondence

<< first < prev **1** next > last >> 1 total records

Grant ID	From	Importance	Topic	Subject	Commands
RP130000 (new)	Doe, John	not urgent	Question	test correspondence	View Thread Reply

<< first < prev **1** next > last >> 1 total records

To Do List Section



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28 Aug 2012	RP130000	Complete Web Form	Duplication of Effort and Project Overlap Form	12 Oct 2012

<< first < prev **1** next > last >> 9 total records

My Grants (Search for Grants)

<< first < prev **1** next > last >> 1 total records

Grant ID	Grant Title	PI Name	Status	Program	Award Mechanism	FY	Cycle
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To Do List

To Do List

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Example of Complete Web Form Action

Grant Information Contacts Documents & Forms Correspondence Budget & Financial Status Reports Progress Reports

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Duplication of Effort and Project Overlap Form

To avoid duplicate payments for the same work please advise CPRIT by indicating below if you have received other grant funding for some or all of the cancer research/prevention services that are the subject of this award subsequent to submitting the application to the Institute.

* Please select one of the following:

- I have received other grant funding for **ALL** not otherwise previously disclosed in my CPRIT grant application ID **RP130000** to support some or all of the research/prevention services that are the subject of the CPRIT award. I have revised my budget request accordingly to reflect the changes to award amount to avoid duplicate payments.
- I have received other grant funding for **SOME** not otherwise previously disclosed in my CPRIT grant application ID **RP130000** to support some or all of the research/prevention services that are the subject of the CPRIT award. I have revised my budget request accordingly to reflect the changes to award amount to avoid duplicate payments.
- I have **NOT** received other grant funding to support some or all of the research/prevention services that are the subject of the CPRIT award not otherwise disclosed in my CPRIT application ID **RP130000**.

By submitting this document to CPRIT's electronic grants management system and submitting it for CPRIT approval, the primary investigator/project director for the project certifies that the information contained herein is correct and should be relied upon by CPRIT in executing the final award contract.

Complete Web Form

Please provide information for all required fields.

Save as Draft and Continue Editing Save as Draft and Close Verify Before Submit Delegate this Task

Choose the recipient of the next action item for this document. Doe, John ASO

No notes available.

Verification of Complete Web Form Action

Verify Information

Please verify that the information provided is correct by entering your password as an electronic signature and selecting the "Verified as Accurate (provide password)" option.

Go Back and Change Verified as Accurate (provide password) Verified as Accurate (provide password) and Add Review Step

Choose the recipient of the next action item for this document.

Provide Password for Approval:

No notes available.

Example of Verify Information Action

Grant Information **Contacts** **Documents & Forms** **Correspondence** **Budget & Financial Status Reports** **Progress Reports**

[Back to Documents](#)

Research Contract Attachment D

To review the Contract Document, please click the following link: [Research Contract Attachment D](#).

Verify Information
Please verify that the information provided is correct by entering your password as an electronic signature and selecting the "Verified as Accurate (provide password)" option.

Verified as Accurate (provide password) Verified as Accurate (provide password) and Add Review Step Delegate this Task

Choose the recipient of the next action item for this document. **Doe, John ASO** ▼

Provide Password for Approval:

No notes available.

Approval of a “Verify Information” Action

ASO Review

Please review the Rebudget Change Request. Verify that the information provided is correct by entering your password as an electronic signature and selecting the "Approve (provide password)" option.

Disapprove and Send Back for Rework (provide justification for disapproval) Approve (provide password) Approve (provide password) and Add Review Step Delegate this Task

Provide Justification for Disapproval

Provide Password for Approval:

No notes available.

My Grants Section



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To Do List

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28 Aug 2012	RP130000	Complete Web Form	Duplication of Effort and Project Overlap Form	12 Oct 2012

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My Grants (Search for Grants)

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Grant ID	Grant Title	PI Name	Status	Program	Award Mechanism	FY	Cycle
RP130000	Test Grant 1 for CGMS Training	Doe, Jane	In Negotiation	Research Programs	Individual Investigator Research Awards	2013	1

<< first < prev 1 next > last >> 1 total records

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Search for Grants

Filter Options

Program
Program:
Fiscal Year:
Award Mechanism:
Cycle:

PI/PI/CR
PI/PI/CR Last Name:

Grant
Grant ID:
Project Title:
Organization:
Grant Status:
Initiating
In Negotiation
Active
In Early Termination
Early Termination
In Close Out

Contract Start Date: From: To:
Contract End Date: From: To:

My Grants

My Grants (Search for Grants)

<< first < prev 1 next > last >> 6 total records

Grant ID	Grant Title	PI Name	Status	Program	Award Mechanism	FY	Cycle
CP120000	Test COMM for CGMS training guide	Doe, Jane	Active	Commercialization Programs	Company Relocation Awards	2012	1
CP130000	Test Grant (COMM) for CGMS Training	Doe, Jane	Active	Commercialization Programs	Company Formation Awards	2013	1
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RP120000	test HHR	Doe, Jane	Active	Research Programs	High-Impact/High-Risk Research Awards	2012	1
PP100000	test PREV	Doe, Jane	Active	Prevention Programs	Evidence-Based Cancer Prevention Services	2010	1
PP130000	Test Prevention Grant for CGMS Training	Doe, Jane	Early Termination	Prevention Programs	Evidence-Based Cancer Prevention Services	2013	1

<< first < prev 1 next > last >> 6 total records

Grants Display



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Logged in as: JaneDPI (Jane Doe) [[not JaneDPI click here](#)]
[My Grants](#) > [Grants](#) > Grant Information

Grant Information

Grant ID: RP130000 **Grant Title:** Test Grant 1 for CGMS Training
PI/PI/CR: Jane Doe **Organization:** XYZ University (Primary)

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Logged in as: JaneDPI (Jane Doe) [[not JaneDPI click here](#)]
My Grants > Grants > Grant Information

Grant Information

Grant ID: RP130000 **Grant Title:** Test Grant 1 for CGMS Training
PI/PI/CR: Jane Doe **Organization:** XYZ University (Primary)

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Grant Information

Contract Start Date: 12 Oct 2012 **Contract End Date:** 11 Oct 2015
Grant Status: In Negotiation
Grant Title: Test Grant 1 for CGMS Training

Grant Links

Associated Grants:
Application Links:

Grant Tags

Tags:

Contacts

Contacts

Grant ID: RP130000 Grant Title: Test Grant 1 for CGMS Training
 P/PI/PD/CR: Jane Doe Organization: XYZ University (Primary)

Grant Information

Contacts

Documents & Forms

Correspondence

Budget & Financial Status Reports

Progress Reports

Change Requests

All Grant Contacts

[Request Change in Contacts](#)

Grant Contacts
 << first < prev 1 next > last >> 3 total records

Role	Name	Commands
Application Signing Official	Doe, John	View Details Replace
Grants Contract/Office of Sponsored Projects Official	Doe, Mary	View Details Replace
Principal Investigator/Program Director/CR - Company Representative	Doe, Jane	View Details Request to Replace

<< first < prev 1 next > last >> 3 total records

All CPRIT Staff Contacts

CPRIT Staff Contacts
 << first < prev 1 next > last >> 3 total records

Role	Name	Commands
Contract Manager	Ross, Betsy	View Details
Financial Officer	Edison, Thomas	View Details
Grants Manager	Franklin, Ben	View Details

<< first < prev 1 next > last >> 3 total records

Documents & Forms

Documents & Forms

Assigned Documents & Forms

<< first < prev 1 next > last >> 3 total records

Title	Description	Assignee	Type	Confidential	Template	Due Date	Status	Commands
Research Contract Attachment C Part 2	Matching Compliance Certification	Doe, Jane	Contract Document	No		12 Oct 2012	Complete Web Form	Start
Research Contract Attachment D	Intellectual Property and Revenue Sharing	Doe, John	Contract Document	No		12 Oct 2012	Verify Information	View
Research Contract Attachment E	Reporting Requirements	Doe, John	Contract Document	No		12 Oct 2012	Verify Information	View

<< first < prev 1 next > last >> 3 total records

Completed Documents & Forms

<< first < prev 1 next > last >> 1 total records

Title	Description	Type	Confidential	Template	Due Date	Status	Commands
Duplication of Effort and Project Overlap Form	Web form requesting information on Duplication of Efforts and Project Overlaps.	Assigned Web Form	No		12 Oct 2012	Approved	View

<< first < prev 1 next > last >> 1 total records

Completed Contract Documents

<< first < prev 1 next > last >> 4 total records

Title	Description	Status	Commands
Contract Attachment B	Verification Request of Contract Document	Approved	View Version History
Research Contract Attachment A	Contract Document Review	Approved	View Version History
Research Contract Attachment C Part 1	Assurances and Certifications	Approved	View Version History
Research Contract Base	Research Contract Base	Approved	View Version History

<< first < prev 1 next > last >> 4 total records

Ad Hoc Documents

<< first < prev next > last >> 0 total records

Title	Last Updated	Commands
No records found.		

Documents & Forms

Ad Hoc Documents

<< first < prev next > last >> 0 total records

Title ▲	Last Updated	Commands
No records found.		

<< first < prev next > last >> 0 total records

Start IP Report Form

Start Revenue Sharing Form

Upload Ad Hoc Document

Correspondence

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Logged in as: JohnDASO (John Doe) [[not JohnDASO click here](#)]
My Grants > Grants > Correspondence

Correspondence

Grant ID: RP130000 **Grant Title:** Test Grant 1 for CGMS Training
PI/PD/CR: Jane Doe **Organization:** XYZ University (Primary)

Grant Information | Contacts | Documents & Forms | **Correspondence** | Budget & Financial Status Reports | Progress Reports

Correspondence

<< first < prev **1** next > last >> 1 total records

From	Importance	Topic	Subject	Sent Date Time	Last Reply	Commands
Doe, John	not urgent	Question	test correspondence	28 Aug 2012 04:08:08 PM		View Thread Reply

<< first < prev **1** next > last >> 1 total records

[Create New Correspondence](#)

New Correspondence

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Grant Information Contacts

Send Correspondence

* Importance: urgent not urgent

From: Doe, John

* Subject: 100 chars allowed

* Topic:

* Send To:
Doe, Jane (PI/PD/CR)
Doe, John (ASO)
Doe, Mary (Grant Contract)
Edison, Thomas (Financial Officer)

(Hold down CTRL key to choose multiple panels or to deselect)

* Body:

Font Name and Size: Arial 13 Font Style: B I U A_x A^x Undo/Redo

Alignment: Paragraph Style: Normal Indenting and Lists: Insert Item

body

Cancel Send Correspondence

Correspondence

From	Importance
Doe, John	not urgent

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Budget & FSR

Grant Information Contacts Documents & Forms Correspondence Budget & Financial Status Reports Progress Reports Change Requests

[View Budget Change Requests](#)

Budget Summary Details Year 1 Details Year 2 Details Year 3 Personnel Level of Effort Financial Status Reports Payments

Budget Summary

Budget Summary Display

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Correspondence
Budget & Financial Status Reports
Progress Reports
Change Requests

[View Budget Change Requests](#)

Budget Summary
Details Year 1
Details Year 2
Details Year 3
Personnel Level of Effort
Financial Status Reports
Payments

Budget Summary

[View Original Application Budget](#) |
 [View Current Budget Attachment B from Contract](#) |
 [Request Change in Budget](#)

Budget	Expendable Funds Year 1	Expendable Funds Year 2	Expendable Funds Year 3	Total Expended Funds	Total Approved Budget	Total Expendable Funds
Direct Charges:						
a. Personnel	\$100,000.00	\$120,000.00	\$130,000.00	\$0.00	\$350,000.00	\$350,000.00
b. Fringe Benefits	\$20,000.00	\$22,000.00	\$25,000.00	\$0.00	\$67,000.00	\$67,000.00
c. Travel	\$5,000.00	\$3,000.00	\$6,000.00	\$0.00	\$14,000.00	\$14,000.00
d. Equipment	\$10,000.00	\$2,800.00	\$5,500.00	\$0.00	\$18,300.00	\$18,300.00
e. Supplies	\$12,000.00	\$15,000.00	\$20,000.00	\$0.00	\$47,000.00	\$47,000.00
f. Contractual	\$8,000.00	\$9,000.00	\$9,500.00	\$0.00	\$26,500.00	\$26,500.00
g. Other	\$2,000.00	\$6,000.00	\$1,000.00	\$0.00	\$9,000.00	\$9,000.00
h. Total Direct Charges	\$157,000.00	\$177,800.00	\$197,000.00	\$0.00	\$531,800.00	\$531,800.00
i. Indirect Charges (research awards only)	\$5,000.00	\$5,000.00	\$5,000.00	\$0.00	\$15,000.00	\$15,000.00
j. Total Charges	\$162,000.00	\$182,800.00	\$202,000.00	\$0.00	\$546,800.00	\$546,800.00

Details Year 1 Display

[View Budget Change Requests](#)

Budget Summary

Details Year 1

Details Year 2

Details Year 3

Personnel Level of Effort

Financial Status Reports

Payments

Details Year 1

	Budget & Expendable Funds			Expended Funds					
	Year 1 Approved Budget	Carry Forward from Previous Year	Year 1 Expendable Funds	Year 1 Quarter 1 Expended Funds	Year 1 Quarter 2 Expended Funds	Year 1 Quarter 3 Expended Funds	Year 1 Quarter 4 Expended Funds	Year 1 Expended Funds All Quarters (% of total year 1 expended and expendable funds)	Year 1 Remaining Expendable Funds
Direct Charges:									
a. Personnel	\$100,000.00	N/A	\$100,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$100,000.00
b. Fringe Benefits	\$20,000.00	N/A	\$20,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$20,000.00
c. Travel	\$5,000.00	N/A	\$5,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$5,000.00
d. Equipment	\$10,000.00	N/A	\$10,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$10,000.00
e. Supplies	\$12,000.00	N/A	\$12,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$12,000.00
f. Contractual	\$8,000.00	N/A	\$8,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$8,000.00
g. Other	\$2,000.00	N/A	\$2,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$2,000.00
h. Total Direct Charges	\$157,000.00	N/A	\$157,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$157,000.00
i. Indirect Charges (research awards only)	\$5,000.00	N/A	\$5,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$5,000.00
j. Total Charges	\$162,000.00	N/A	\$162,000.00	N/A	N/A	N/A	N/A	\$0.00 (0%)	\$162,000.00

PLOE Display

Budget Summary		Details Year 1	Details Year 2	Details Year 3	Personnel Level of Effort	Financial Status Reports		Payments	
Personnel Level of Effort									
Request Change of Personnel Level of Effort									
Senior/Key Person and Other Personnel			Level of Effort (LOE)	Year 1	Year 2	Year 3	Year 4	Year 5	Total Person Months Per Person
First Name	Last Name	Role on Project							
Clara	Barton	Research Assistant	Type Appt. (months)	12	12	12	N/A	N/A	
			Effort on Project	100%	100%	100%	N/A	N/A	
			Person Months	12.00	12.00	12.00	N/A	N/A	
Jane	Doe	PI	Type Appt. (months)	12	12	12	N/A	N/A	
			Effort on Project	50%	50%	50%	N/A	N/A	
			Person Months	6.00	6.00	6.00	N/A	N/A	
George	Washington	Co-PI	Type Appt. (months)	9	9	9	N/A	N/A	
			Effort on Project	30%	30%	30%	N/A	N/A	
			Person Months	2.70	2.70	2.70	N/A	N/A	
			Total Person Months Per Year	20.70	20.70	20.70	N/A	N/A	62.10

FSR Display

Budget Summary		Details Year 1		Details Year 2		Details Year 3		Personnel Level of Effort		Financial Status Reports		Payments	
Financial Status Reports													
				Period Covered by FSR Report		Summary of Contents							
Year	Quarter	Start	End	Project Cost This Period	Remaining Budget Balance (all years)	Date FSR Created	Date FSR Approved	Current Status	Commands				
Y1	Q1	12 Oct 2012	30 Nov 2012	\$0.00	\$546,800.00	30 Aug 2012		Complete Web Form	Edit FSR				
Total:													

Payments Display

Budget Summary	Details Year 1	Details Year 2	Details Year 3	Personnel Level of Effort	Financial Status Reports	Payments					
Payments											
Request Advancement of Funds											
Transaction Type	Advanced Funds Balance Before Transaction	Expended Funds	Payment Due (Expended Funds Minus Current Advance Balance)	Amount Of Payment	Advance Funds Balance After Transaction	Date Payment Authorized *	Date Payment Made	Payment Type	Payment ID	Commands	
No Payments											

FSR Form

CANCER PREVENTION AND RESEARCH INSTITUTE OF TEXAS FINANCIAL STATUS REPORT Form 269A				
PO Box 12097, Capital Station Austin, TX 78711			512-463-3190 512-475-2563 (Fax)	
Contractor Name:		CPRIT Project No.: RP130000		
Project Title:		Test Grant 1 for CGMS Training		
Payee Name:				
Address:		Contract Term (Month / Day / Year):		
City, State, ZIP:		From: 10/12/12 To: 10/11/15		
Payee Vendor ID No.:		Period Covered by this Report		
Final Report? <input type="radio"/> Yes <input type="radio"/> No		Start:	End:	
		10/12/12	11/30/12	
(i.) BUDGET CATEGORIES	(ii.) APPROVED BUDGET	(iii.) PROJECT COSTS THIS PERIOD	(iv.) CUMULATIVE PROJECT COSTS	(v.) REMAINING BUDGET BALANCE (ii minus iv)
a. Personnel	\$350,000.00	\$0.00	\$0.00	\$350,000.00
b. Fringe Benefits	\$67,000.00	\$0.00	\$0.00	\$67,000.00
c. Travel	\$14,000.00	\$0.00	\$0.00	\$14,000.00
d. Equipment	\$18,300.00	\$0.00	\$0.00	\$18,300.00
e. Supplies	\$47,000.00	\$0.00	\$0.00	\$47,000.00
f. Contractual	\$26,500.00	\$0.00	\$0.00	\$26,500.00
g. Other	\$9,000.00	\$0.00	\$0.00	\$9,000.00
h. Total Direct Charges	\$531,800.00	\$0.00	\$0.00	\$531,800.00
i. Indirect Charges (research awards only)	\$15,000.00	\$0.00	\$0.00	\$15,000.00
j. Total Charges	\$546,800.00	\$0.00	\$0.00	\$546,800.00
k. Program Income Expended		\$0.00	\$0.00	\$0.00
l. In-Kind Contributions (prevention awards only)		N/A	N/A	N/A
Prepared By: Doe, John		Telephone No.:		
Title: ASO				
CERTIFICATION: I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays and unliquidated obligations are for the purposes set forth in the award documents.				
Signature of Authorized Certifying Official:		Telephone No.:		
		Fax No.:		
Typed or Printed Name and Title of Certifying Official:		Date Submitted:		
		FSR Receipt Date:		
12a. Prior Years Program Income Carryover				\$0.00
12b. Current Year Program Income Collected				\$0.00
12c. Total Program Income (prior year carryover & current year collected)				\$0.00
*Item 11k © must be equal to or greater than Item 12a by the end of the contract. () indicate with an X each category where				

Progress Reports

[My Profile](#) [My Applications](#) **[My Grants](#)** [Current Funding Opportunities](#) [Feedback](#)

[Home](#) **[Grants](#)** [Correspondence & Notifications](#)

Logged in as: JaneDPI (Jane Doe) [[not JaneDPI click here](#)]
[My Grants](#) > [Grants](#) > [Progress Reports](#)

Progress Reports

Grant ID: RP130000 Grant Title: Test Grant 1 for CGMS Training
PI/PD/CR: Jane Doe Organization: XYZ University (Primary)

[Grant Information](#) [Contacts](#) [Documents & Forms](#) [Correspondence](#) [Budget & Financial Status Reports](#) **[Progress Reports](#)** [Change Requests](#)

Progress Reports Due

<< first < prev **1** next > last >> 1 total records

Type	Start Date	Due Date	Status	Assignee	Last Updated	Commands
Research Progress Report	30 Aug 2012	10 Dec 2012	Draft	Doe, Jane	30 Aug 2012	Edit

<< first < prev **1** next > last >> 1 total records

Completed Progress Reports

<< first < prev next > last >> 0 total records

Type	Start Date	Due Date	Status	Commands
No records found.				

<< first < prev next > last >> 0 total records

Progress Reports — Components (Vertical Subtabs)

Grant Information | Contacts | Documents & Forms | Correspondence | Budget & Financial Status Reports | Progress Reports | Change Requests

Annual Progress Report

Grant Year Ending 12 Oct 2013
[Back to Progress Reports](#)

* = Required

Summary of Goals

*** Summary of Goals:**
Provide a brief summary of the progress of the project, results obtained to date, problems/issues encountered and actions taken, and the anticipated activities for the year ahead. Refer specifically to the goals and timelines as set forth in the Scope of Work (Attachment A to the CPRIT Grant Contract).

Text Editing Tools

Font Name and Size: Arial 13 | Font Style: **B** *I* U abc | Lists: [List Icons]

Insert Item: [Link Icon] [Image Icon]

body

Save Section as Draft | Reset | Mark as Completed

Progress Reports — Mark as Completed

Grant Information Contacts Documents & Forms Correspondence Budget & Financial Status Reports Progress Reports Change Requests

Annual Progress Report

Grant Year Ending 15 Oct 2013
[Back to Progress Reports](#)

Progress

- Summary of Goals for Next Year
- Client Stories and Quotes
- Materials Produced
- Project Information
- Publications
- Patents
- Review and Submit

Progress * = Required

* Description of Progress Against Timeline and Goals:

Text Editing Tools

Font Name and Size: Arial 13 Font Style: B I U abc Lists

Insert Item

body

* Challenges and barriers encountered and strategies used to overcome:

Text Editing Tools

Font Name and Size: Arial 13 Font Style: B I U abc Lists

Insert Item

body

* Status:

▼

Progress Reports — Review and Submit

Grant Information Contacts Documents & Forms Correspondence Budget & Financial Status Reports Progress Reports Change Requests

Annual Progress Report

Marked as Completed

Grant Year Ending 19 Oct 2013
[Back to Progress Reports](#)

- Major Findings/Progress
- Summary of Goals
- Publications
- Intellectual Property and Reporting
- Economic Impact
- Supporting Documents
- Review and Submit**

Review and Submit

Section	Status	Commands
Major Findings/Progress	Completed	View
Summary of Goals	Draft	Edit
Publications	Draft	Edit
Intellectual Property and Reporting	Draft	Edit
Economic Impact	Draft	Edit
Supporting Documents	Draft	Edit

Complete Web Form

You must complete all sections of the Annual Progress Report before submitting by selecting each tab to view and complete each section. Submit the Annual Progress Report by selecting the "Verify Before Submit" option.

Verify Before Submit Delegate this Task

Choose the recipient of the next action item for this document.

No notes available.

Change Requests

My Profile | My Applications | **My Grants** | Current Funding Opportunities | Feedback

Home | **Grants** | Correspondence & Notifications

Logged in as: JohnDASO (John Doe) [[not JohnDASO click here](#)]
 My Grants > Grants > Change Requests

Change Requests

Grant ID: RP130000 Grant Title: Test Grant 1 for CGMS Training
 PI/PI/CR: Jane Doe Organization: XYZ University (Primary)

Grant Information | Contacts | Documents & Forms | Correspondence | Budget & Financial Status Reports | Progress Reports | **Change Requests**

Change Requests

Change Request Type:
 Advancement of Funds Form

<< first < prev 1 next > last >> 5 total records

Request Date	Originator	Request Category	Request Type	Status	Request Details	View Request
30 Aug 2012	Doe, John	Budget and LOE	Advancement of Funds Form	Complete Web Form		View / Edit
28 Aug 2012	TraicoffCM, JuneT	Contract	Attachment F - Change Request	Canceled - user being replaced		
30 Aug 2012	Doe, John	Budget and LOE	Change in Key Personnel Level of Effort (LOE)	Complete Web Form		View / Edit
30 Aug 2012	Doe, John	Research	No Cost Extension	Grants Manager Review		View / Edit
30 Aug 2012	Doe, John	Budget and LOE	Rebudgeting	Complete Web Form		View / Edit

<< first < prev 1 next > last >> 5 total records

Change Requests Dropdown Menu

Grant Information
Contacts
Documents & Forms
Correspondence
Budget & Financial Status Reports
Progress Reports
Change Requests

Change Requests

Change Request Type:

Advancement of Funds Form
Advancement of Funds Form
 Budget Supplement Change Request Form
 Change - Not Otherwise Specified
 Change in Key Personnel Level of Effort (LOE)
 Contract Amendment Change Request
 No Cost Extension
 Rebudgeting

total records

Request Category	Request Type	Status	Request Details	View Request
Contract	Attachment F - Change Request	Complete Web Form		
06 Sep 2012	Doe, John	Research	No Cost Extension	Cancelled

<< first < prev **1** next > last >> 2 total records

Change Requests — Action Page

Grant Information Contacts Documents & Forms Correspondence Budget & Financial Status Reports Progress Reports **Change Requests** Close Out

[Back to Change Requests](#)

Change - Not Otherwise Specified

* Change Request Details:

Text Editing Tools

Font Name and Size: Arial 13

Font Style: **B** *I* U abc

Lists: [List Icons]

Insert Item: [Link Icon] [Image Icon]

body

* Justification:

[Text Area] (5,000 chars. limit)

Complete Web Form
You must provide a detailed description and justification of what you need changed.

Save as Draft and Continue Editing Save as Draft and Close Verify Before Submit (provide justification for request) Cancel Request

No notes available.

5 Key Points to Remember

- “Right person, Right function, Right time”
- Home and Grants Information pages
- Web forms
- Password signatures
- Repository

Technical Support

- **Hours of Operation:**
 - Monday through Friday (excluding public holidays)
 - 7 am to 4 pm Central Time
- **Tel:** 866-941-7146
- **Email:** help@cpritrgrants.org 