Agenda

- Introductions
- Announcements:
  - 2 Day Error Correction Window is Closed
  - PHS Research Management Intranet
  - RAAC (Research Administration Advisory Committee) Update
- Insight Upgrade
- InfoEd Overview
- Subcontract Invoices
Announcements

NIH 2 day Error Correction Window is closed

- Proposal must be submitted by 5 pm on the due date

Note: SF424 application will change 05/07/11

Reminder: do not include the science/technical section in the appendix material
Redesigned Partners Research Management Intranet

- Improved Layout & Design, New Colors & Graphics
- More Intuitive Navigation Built Around Award Lifecycle
  - Main navigation bar and utility navigation bar on every page
- Efforts underway to make this a more “integrated” intranet site “Partners wide”
- [http://phsresearchintranet.partners.org](http://phsresearchintranet.partners.org)
Welcome to the Partners Research Management Intranet

It is our pleasure to welcome you to the Partners Research Management Intranet. This intranet, which was redesigned with the research community in mind, currently focuses on the administration of grants and contracts and features news and information about the Partners Research Management department. Other offices involved with the administration of research projects include Partners Clinical Research Office (PCRO), Partners Human Research Affairs, which includes Partners Human Research Committee/Institutional Review Board (IRB), Human Research Quality Improvement Program and Embryonic Stem Cell Oversight (ESCRO), Partners Research Ventures and Licensing (RVL) and Partners Compliance and Business Integrity. More information about these groups, as well as many others involved with administering research projects, can be found in the Research Support Departments section.

With reorganized navigation, new features and enhanced functionality, the redesigned intranet now provides easy access to the policies, procedures, information, forms and tools needed to prepare and submit...
• Left navigation appears on all pages
  Side menu/pop-out menu allows users to drill down into information
Research Administration Advisory Committee

Purpose:
- With constantly changing federal regulations and Partners compliance requirements, we frequently need to revise our own internal policies. We would like the RAAC to advise McL Research Administration on how we can better communicate important information to the research community, and also advise on the need for training or re-training as systems and requirements evolve. Although separate from the DRAW, the Committee will also provide input on suggested agenda items for consideration at future DRAW meetings.

Members:
- A group of ~ 5 members to include administrators with different experiences (junior, senior), a representative from each research building; at least one PI; a Chair & Co-Chair.
- The members will be selected by McL RA and the appointment is expected to last one year. Upon expiration, the members may be re-elected to stay in the committee.
RAAC Update

- Research Administration has selected members of the RAAC committee
- Meetings will begin soon to be scheduled every other month
Insight Upgrade: What is the fund statement?

- New tool in Insight to assist central staff, as well as department administrators, to more accurately and effectively monitor accounts.

- New tool will help facilitate proactive fund management by focusing on awarded amount available to expend or on deficit balances requiring action for resolution.
Webinar Training is still Available!

- A webinar is available that will walk you through the changes to the Agreements module and will help you understand the new fund statement and alert levels. This webinar is also located directly in Insight:

http://stage-phsresearchintranet.partners.org/RM_Home/Documents/PowerPoint/FundStatement101/index.htm
How is it going to help you?

- It will save you time and streamline your account monitoring process!
  - Provides quick glance guidance
  - Provides a link that brings you right to the issue (so you don’t have to search for it)
  - Helps you zero in on which accounts need immediate attention

- Prioritization tool
  It will help you identify who is responsible for taking the first step in resolving the issue.
  - Helps you get “unstuck” and points you in the right direction
Things to keep in mind...

- Fund balances are updated monthly in Insight
  - **Remember**: The data is frozen in time and represents the previous month-end
  - It will not reflect current month updates
- Fund classifications (red, yellow, green) are only assigned after a transaction posts to the account; these are designed to indicate risk, but are not perfect
- Inactive funds are not classified
Things to keep in mind…

- A new feature added to the agreement summary page is the “balance type”.
  - This new column will indicate the balance type that should be used to manage each fund and will also enable sorting (B budget balance; C cash balance).

- Another new feature is the “fund classification” column.
  - This new column will notify users of accounts that require attention with a red, yellow or green alert.
This fund is a **Cash** based account.
The fund is currently **clearing expenses** and is in good standing.
Your current fund balance is **$3,875.00**.

### Financial Details

<table>
<thead>
<tr>
<th>Category/Account</th>
<th>Budget</th>
<th>Expense</th>
<th>Current Balance</th>
<th>Encumbrance</th>
<th>Projected Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salaries &amp; Wages</strong></td>
<td>$0.00</td>
<td>$175,730.50</td>
<td>($175,730.50)</td>
<td>$9,128.06</td>
<td>($166,562.46)</td>
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<tr>
<td><strong>Fringe Benefits</strong></td>
<td>$0.00</td>
<td>$55,248.49</td>
<td>($55,248.49)</td>
<td>$2,964.27</td>
<td>($52,284.22)</td>
</tr>
<tr>
<td><strong>Consumable Supplies</strong></td>
<td>$0.00</td>
<td>$4,503.32</td>
<td>($4,503.32)</td>
<td>$0.00</td>
<td>($4,503.32)</td>
</tr>
<tr>
<td><strong>Equipment</strong></td>
<td>$0.00</td>
<td>$7,411.65</td>
<td>($7,411.65)</td>
<td>$7,965.00</td>
<td>($15,376.85)</td>
</tr>
<tr>
<td><strong>Non-Capital Equip</strong></td>
<td>$0.00</td>
<td>$14,115.04</td>
<td>($14,115.04)</td>
<td>$0.08</td>
<td>($14,114.96)</td>
</tr>
<tr>
<td><strong>Other Expenses</strong></td>
<td>$76,583.00</td>
<td>$32,801.15</td>
<td>$40,781.85</td>
<td>$1,255.32</td>
<td>$39,526.53</td>
</tr>
<tr>
<td><strong>Total Direct Costs</strong></td>
<td>$76,583.00</td>
<td>$295,810.45</td>
<td>($218,227.45)</td>
<td>$21,362.66</td>
<td>($237,812.10)</td>
</tr>
<tr>
<td><strong>Indirect Costs</strong></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total Costs</strong></td>
<td>$76,583.00</td>
<td>$295,810.45</td>
<td>($218,227.45)</td>
<td>$21,362.66</td>
<td>($237,812.10)</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>$76,583.00</td>
<td>$299,485.88</td>
<td>$221,968.88</td>
<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td><strong>Prior Year Balance</strong></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>($17,487.22)</td>
</tr>
<tr>
<td><strong>Cash Balance</strong></td>
<td>$0.00</td>
<td>$3,875.43</td>
<td>$3,875.43</td>
<td>$3,875.43</td>
<td>$3,875.43</td>
</tr>
</tbody>
</table>

### Personnel for Current Budget Period

- [View cumulative years - fund](http://jeat-insight.org/Agreements/AgreementsBudgetOverview.aspx)
### Financial Summary

**Selected Fund Status:** Active Fund  
**Selected Fund #:** 213402  
**Selected View:** View All

- **Fund #:** 213402  
- **PI Name:** Martza, Robert  
- **Project End Date:** 04/30/2010  
- **COS:** 40AA  
- **Total Budget Amount:** $57,500.00  
- **Expenses To Date:** $69,065.47  
- **Fund Balance:** ($11,565.47)  
- **Last Month Expenses:** $0.00  
- **Budget Balance:** ($11,565.47)  
- **Income:** $67,500.00  
- **Cash Balance:** ($11,565.47)  
- **Balance:** C

**Totals:**  
- **Total Budget Amount:** $57,500.00  
- **Expenses To Date:** $69,065.47  
- **Fund Balance:** ($11,565.47)  
- **Last Month Expenses:** $0.00  
- **Budget Balance:** ($11,565.47)  
- **Income:** $67,500.00  
- **Cash Balance:** ($11,565.47)
- This fund is a **Cash** based account.
- The fund is currently classified as: 🟢 because it requires attention by Research Management or the Department. [Click here to see the detail causing this alert status.](#)
- Your current fund balance is **($11,565.00)**

<table>
<thead>
<tr>
<th>Category/Account</th>
<th>Expense</th>
<th>Encumbrance</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES &amp; WAGES</td>
<td>$24,416.70</td>
<td></td>
</tr>
<tr>
<td>FRINGE BENEFITS</td>
<td>$8,438.82</td>
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</tr>
<tr>
<td>CONSUMABLE SUPPLIES</td>
<td>$14,274.93</td>
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<tr>
<td>ANIMAL RELATED EXP</td>
<td>$8,944.25</td>
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</tr>
<tr>
<td>OTHER EXPENSES</td>
<td>$5,982.13</td>
<td></td>
</tr>
<tr>
<td>TOTAL DIRECT COSTS</td>
<td>$60,056.83</td>
<td></td>
</tr>
<tr>
<td>INDIRECT COSTS</td>
<td>$9,008.84</td>
<td></td>
</tr>
<tr>
<td>TOTAL COSTS</td>
<td><strong>$89,065.47</strong></td>
<td></td>
</tr>
<tr>
<td>TOTAL INCOME</td>
<td>$7,500.00</td>
<td></td>
</tr>
<tr>
<td>Prior Year Balance</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Cash Balance</td>
<td><strong>($11,565.47)</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Financial Summary >> Financial Details >> Total Cost Details

<table>
<thead>
<tr>
<th>Fund #</th>
<th>Status</th>
<th>PI Name</th>
<th>Project Title</th>
<th>Sponsor Name</th>
<th>Sponsor #</th>
<th>Budget Start/End</th>
<th>Project Start/End</th>
<th>Institution</th>
<th>Chair</th>
</tr>
</thead>
</table>

**Total Cost Details Breakdown:** $69,065.47  | As of 5/31/2010

<table>
<thead>
<tr>
<th>EXPENSE STATUS</th>
<th>RESPONSIBILITY</th>
<th>REASON</th>
<th>CLASSIFICATION</th>
<th>AMOUNT</th>
<th>CONTACT PERSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenses Not Billed</td>
<td>DEPARTMENT</td>
<td>Research Sundry Debt</td>
<td>☒</td>
<td>$11,565.47</td>
<td>Department Admin</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SUBTOTAL: UNBILLED</strong></td>
<td><strong>EXPENSES - DEPARTMENT</strong></td>
<td><strong>$11,565.47</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Billed and Received</td>
<td>RESEARCH MANAGEMENT</td>
<td>Cash</td>
<td>☒</td>
<td>$57,500.00</td>
<td>Billing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SUBTOTAL: BILLED</strong></td>
<td><strong>EXPENSES</strong></td>
<td><strong>$57,500.00</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL EXPENSES**  | **$69,065.47**
What’s next?

- Use the new tools and reports
- Verify cash and budget balances
- Tips!
  - Grants, subcontracts: Budget Balance
  - Sundry funds, industry sponsored clinical trials: Cash Balance

- Fund Specific Issues:
  - If fund type is not correct, for example the “Balance Type” should be a “Cash” and not “Budget”: email Mike Roberts or Raquel Espinosa

- System Related Issues: If you would like to send your feedback: Email InsightHelpDesk@partners.org & copy InsightFeedback@mclean.harvard.edu
  - What works well?
  - What do you wish the system could provide?
  - What is confusing?
  - Improvements?
Introduction to InfoEd Proposal Development (PD)

McLean Hospital
2/15/11
Agenda

- Introduction
- InfoEd Proposal Development overview
  - Scope of Implementation
  - Benefits and Value
  - Impact to business process
- Implementation Project
  - Rollout Schedule
  - Training
  - Strategy
- Questions
InfoEd PD Implementation Team

- Franklin Thayer – Research Management
- Charlie Yi – Research Applications Group
- Katie McGroggan – Research Applications Group
- Members of the Pre-Award Grant Administration Team

Hospital Champions
- Lauren Robertson - BWH
- Donna Smith – MGH
- Bonnie Wheeler – BWH
- Deb Zelen – MGH
In Scope

- Become the single point of entry for all “NEW” proposals submitted
- Provide investigators and administrators with an online portal for preparing, submitting, approving/routing and tracking their grant applications
- Replace the Partners coversheet, budget template, sign off, and eGrant submission site through one seamless application
- End User Documentation, Computer Based Training (CBT) and webinars of the application for training departmental users
Scope of Implementation

Out of Scope

- Full SF424 Application Creation, Development and Submission directly to Grants.Gov
- Adobe Application Downloads or Other Sponsor Form Sets
- Automation of other Business Processes Associated with the Grants Lifecycle e.g., Conflict of Interest forms
Overview of PD

InfoEd PD Components

- Proposal Set Up Questions
- Budgeting Module
- Attachment Upload Interface
- Partners Electronic Coversheet
- Electronic Routing Process
Phase Benefits and Value

**Greater Data Accuracy**
- Single source online hub for collaborative application preparation
- Auto-fill utility can conveniently load standard institution specific details (e.g., fringe and F&A rates)
- Records are automatically checked for completeness upon submission

**Improved Budgeting Functionality**
- Automatically loads appropriate institutional details (e.g., institution specific fringe rates and F&A rates, etc.).
- Ability to capture sponsor rules and apply data integrity rules automatically (e.g., allowable budget categories, salary caps, category caps, etc.)
- Versioning functionality enables users to save multiple versions of a budget

**Proposal Submission Transparency**
- Centralized attachment utility for supporting materials allows users to remove and update previously submitted documents.
- Electronic routing and approval mechanism allows for real-time updates of who has approved or is reviewing the submitted grant proposal
Impact to Current Business Process

Current Proposal Submission Process

PI/Grant Admin. develops proposal for submission

Department signatures obtained

PI or Grant Admin. submits proposal to RM Pre-Award staff

Proposed Package Includes:
- SF424
- Partners Coversheet
- Budget Template
- COI form
- Sponsor Face page
- Other proposal elements

PI / Grant Admin and Pre-Award revise for final submission to sponsor

RM Pre-Award staff submits final proposal to sponsor

Methods:
- Email
- Fax
- Mail
Impact to Current Business Process

InfoEd PD Proposal Submission Process After Phase 1

- PI/Grant Admin. develops proposal for submission in InfoEd PD
- Entered into InfoEd PD:
  - Proposal Setup Questions
  - Budget Information
  - Partners Coversheet
- PI / Grant Admin and Pre-Award revise for final submission to sponsor
- RM Pre-Award staff submits final proposal to sponsor
- Attached documents:
  - Completed Proposal (i.e. SF424)
  - COI form
  - Sponsor Face page
  - Other proposal elements
- Electronic routing for approval signatures
Routing Approval Process

Draft 10 Day Proposal Review Stage

- Proposal is locked down pending PI and Chief approval
- At each stage, users have ability to approve or decline as well as add comments that are reported to the PI

Editing Stage

Final 5 Day Proposal Review Stage

- Proposal is locked down once submitted for Final Route
What does this mean for you?

- One source for all New Proposals
  - No need for shadow systems tracking proposals – instant access to proposal status – more accurate information fed into Insight i.e.
  - Other Support
- Proposal review documented & available for reference
- Use existing proposal for resubmissions
- Allows for tracking changes to admin. docs (COI, sponsor forms)
What does this mean for you?

- **Electronic Routing**
  - Electronic signatures for Dept. Admin, PI and Chief
  - No need to travel
  - Signatures/Approvals can be completed anywhere there is access to the internet

<table>
<thead>
<tr>
<th>Minutes required to get 1 signature</th>
<th>5-10 minutes*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of signatures needed per proposal</td>
<td>2 (PI &amp; Dept. Chief)</td>
</tr>
<tr>
<td>Approximate MGH Psychiatry NEW Proposals FY09</td>
<td>213</td>
</tr>
<tr>
<td><strong>Potential Time Save</strong></td>
<td><strong>2130 - 4260 minutes</strong></td>
</tr>
<tr>
<td></td>
<td><strong>35.5 – 71 hours</strong></td>
</tr>
<tr>
<td></td>
<td><strong>4.4 – 8.9 Working days</strong></td>
</tr>
</tbody>
</table>

* Time estimate from BWH Pilot participant
# Department Rollout Steps & Timeline

<table>
<thead>
<tr>
<th>Rollout Step</th>
<th>Date</th>
<th>Deliverable</th>
</tr>
</thead>
</table>
| 1 - Meeting with department administrative leadership | Nov. 2010  | • Systems Configuration/Security Template  
• Introductory presentation slides of InfoEd PD  
• Training dates, signup process and self learning training modules review |
| 2 - Introduction to InfoEd PD presentation to department | Nov.-Dec. 2010 | • Introductory presentation slides of InfoEd PD  
• Links to online training documentation |
| 3 - Training for DAs and PIs | Dec ‘10- Mar ‘11 | • Classroom based training  
• Computer Based Training Module  
• Live and recorded Webinar training |
| 4 - Customer service outreach | Dec ‘10- Mar ‘11 | • On-site training refresher for proposal submission if requested  
• On-site training refresher for route approval process if requested |
| 5 - Post implementation follow-up | Apr. 2011  | • Lessons Learned meeting between department and Research Management  
• Transactional On-line surveys |

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**Department Rollout Timeline - Group 6**

- Classroom training 2xs month  
  - Feb - May ’11

- Live Webinar  
  - Feb  
  - Mar  
  - Apr  
  - May  
  - Jun

- Rollout Start: Feb 1, 2011  
  - 100% InfoEd PD: Jun 1, 2011

- Computer Based Training Modules & Recorded Webinars Available
Proposal Development Training

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Training Curriculum</td>
<td>“How-to” reference manual that will combine software functionality and PHS business specific rules and processes.</td>
<td>October 4th 2010</td>
</tr>
<tr>
<td>Computer Based Training Modules</td>
<td>Computer Based Training (CBT) curriculum will be based upon the Classroom Training design. The curriculum will include 5 modules covering Proposal Creation and Routing approval and include quizzes to reinforce comprehension.</td>
<td>October 4th 2010</td>
</tr>
<tr>
<td>Webinar</td>
<td>A blend of the classroom-based training module and the CBT design into a webinar format.</td>
<td>October 2010</td>
</tr>
</tbody>
</table>

Training Notes

- Training Begins on Date of “Go-Live”
- Departments have 4 months to ensure all of the necessary users are trained.
- There are 2 classroom trainings a month, dates available on RM Intranet
- CBT and Webinars offered as well – information on RM intranet
Rollout Strategy

August 1\textsuperscript{st} System Go-Live for Requested Critical Enhancements

- 14 Pilot Group Departments (28\% of total Proposals Submitted Partners wide FY09)
- Critical enhancements implemented and access to new training deliverables i.e., Computer Based Training

August-September 2010

- Build buy-in for new departments – order based on proposal volume FY09
- Allow for other RM initiatives
- Allow departments opportunity for workload around end of fiscal year and high volume NIH deadlines

October & November 2010

- Begin training and implementation of new departments
- First 2 groups (12 departments) - represent 32\% of total proposals submitted Partners wide FY09
- Combined with Pilot departments, represent 60\% of total proposals submitted Partners wide FY09
Questions or Comments?

- Contact Information

Franklin Thayer
fthayer@partners.org
Phone: 617-954-9672
InfoEd Overview
InfoEd SubInvoice Approval Troubleshooting Q&A

- Q: Who is allowed to approve / deny invoices?
- A: Only authorized department contacts that receive an invoice notification email from PHS Research eSubmissions (on behalf of PHS Research Finance) can approve / deny a subcontract invoice in InfoEd. This includes the fund’s PI and the Department Administrator(s) or Finance Manager(s) who are noted in InfoEd as the fund’s Department Manager.

- Q: I am the main department contact that now receives incoming invoice email notifications from PHS Research eSubmissions. However, I would like other members of my department to receive these emails so they can also approve / deny subinvoices. How do I update PHS Research Finance regarding adding contacts to receive these notification emails?
- A: We are able to add a maximum of (3) department contacts that can receive automated email notifications of incoming invoices from PHS Research eSubmissions in addition to the fund’s PI (the PI associated with the fund in InfoEd will also automatically receive this email).
Q: Can a department change an invoice’s status once it has been approved or denied by an authorized recipient?
A: No. Once an authorized department contact either approves or denies an invoice, its status cannot be changed. Please ensure you are certain that an invoice should be approved / denied before updating its status in InfoEd. Departments have 20-business days to review a new subinvoice.

Q: What happens if I deny an invoice and then later decide it is okay to pay?
A: PHS Research Finance has the authority to change an invoice’s deliverable status. For these instances, send a request to your institution’s central subinvoice mailbox to resubmit the invoice for approval (citing the reason it can now be approved). RF will upload the invoice again with a comment as to why it can now be approved. This will prompt a new notification email from PHS Research eSubmissions to all department recipients with a link to approve the invoice. Please note that this will not result in a duplicate payment.
Q: What is the difference between “low-risk” & “high-risk” invoices?

A: “Low-risk” invoices are issued by US (domestic) subrecipients and under $50,000. “High-risk” invoices are either: 1. Issued by an international subrecipient (including Canada) where payment is issued through wire transfer by the PHS Treasury rather than through a standard check issued by AP; 2. All domestic & international invoices over $50,000.

Q: What is the “auto-payment” process? Are there any checks & balances in place to avoid erroneous / duplicate payments?

A: “Auto-payment” only applies to low-risk invoices. If a department does not approve or deny a low-risk subinvoice 20-business days after it has been uploaded to InfoEd, it will be distributed for review by the department’s Research Finance Specialist. If the invoice does not have any discrepancies and is within budget, the RF Specialist will approve the invoice on behalf of the department. The invoice will then be mailed to AP to issue payment. If the RF Specialist finds a problem with the invoice, (s)he will notify the affiliated department and request a revision from the issuing institution. *Research Finance will not automatically pay any subinvoices without a complete review.*
Q: When looking at the invoice’s Deliverable in InfoEd, what do I do if I see an error with the invoice’s prepared Check Request Form (CRF)?
A: For these instances, you do not need to deny the invoice. If the invoice can otherwise be approved, click “Approve” in InfoEd and add a comment with the request of how to update the CRF. Research Finance will then adjust the CRF per the department’s request & add a comment of the amendment in the invoice’s deliverable in InfoEd.

Q: What happens after I approve a subinvoice in InfoEd?
A: Once approved by the department, PHS Research eSubmissions will notify the institutions’ central subinvoice mailbox. The invoice will then be distributed to that department’s RF Specialist for additional review / CRF signature. Once the RF Specialist provides secondary approval, the invoice will then be mailed to AP by Research Finance. The invoice’s deliverable will then be updated by PHS Research Finance.
Q: How do I know when an approved invoice has been mailed to AP by Research Finance?
A: Once mailed to AP, PHS Research Finance will update the deliverable’s status in InfoEd to “Invoice Sent to AP for Payment.” AP will then issue a voucher number and scheduled pay date (This typically takes 5-7 business days after the invoice is mailed from PHS RF).

Once AP has received the payment request from PHS Research Finance, they will send an automated email with scheduled payment details to the department contact whose email address is listed on the CRF.

Q: What if I need more than 20-business days to review an invoice? Should I deny it in InfoEd?
A: Do not deny the invoice in InfoEd under these circumstances. Send a request for additional time to your institution’s central subinvoice mailbox with the affiliated fund #, subrecipient, invoice #, billing period, dollar amount, & reason more time is requested. Research Finance will refrain from initiating the auto-payment process after receiving a department’s request for additional review time.

This only applies to low-risk invoices that can be auto-paid after 20-business days. You do not need to request additional time for high-risk invoices, as they are not susceptible to auto-payment.
Q: Under what circumstances should I deny an invoice?

A: Deny an invoice if:
- Your department does not agree with the documented expenses (e.g., the work was not performed as the invoice details)
- The invoice exceeds the subrecipient’s allotted budget (including any Carry Forward that may apply)
- There are errors in the invoice that requires a revision
- For all denied invoices, departments must add a detailed comment with an explanation of why the invoice cannot be paid. This helps RF understand how best to proceed.

Q: What happens after I deny an invoice?

A: Once denied by a department, PHS Research eSubmissions will notify either the institution’s central subinvoice mailbox. PHS Research Finance will then work with the department to resolve based on the reason for dispute (e.g., Request a revised invoice on behalf of the department, etc.).
InfoEd SubInvoice Approval Troubleshooting Q&A

- Q: I am receiving multiple email notifications from PHS Research eSubmissions for the same invoice. Is this a duplicate email I should ignore?

- A: No. PHS Research eSubmissions will send out reminder emails to departments a week after the original email notification if there is no department response. This is to remind the department that the invoice is still waiting for a response. The body of the email will be the same as the original sent, with the difference being in the subject line. It will read: "Reminder: Subcontract Invoice XXXXXX."
  - Departments will also receive an email notification when low-risk invoices have exceeded their 20-business day review period with no response. This email is intended to notify the departments that the invoice will begin the "auto payment" process on their behalf. It will read: "Update: Subcontract Invoice for Fund XXXXXX" & state "This invoice has been approved automatically by the system, based on a pre-defined rule."
Questions?

If you have any questions please forward them to

McLSubcontractInvoice@partners.org
Questions?
Contact

Raquel Espinosa
Phone: 617-855-2868
respinosa@partners.org