

GMAS Subagreement Roadshow

January 19, 2023

11:00 – 12:00

Agenda

- **GMAS Project Overview**
- **February Release Overview**
- **GMAS Subagreement Enhancement – Benefits**
- **GMAS Subagreement Training**
- **Q&A**

GMAS Subagreement Project Overview

GMAS Subagreement Project Overview

- The GMAS Subagreement Enhancements will be available on **February 27th, 2023**
- Work on the GMAS Subagreement Project began in January 2021 as a result of prioritization by the GMAS Business Steering Committee



GMAS Subagreement Committee



February 2023 Release Overview

Enhancements to Proposal/Request

Sub Entry at Proposal

HarvardGMAS The complexity of informal caregiving for Alzheimer's disease and rel...

PI: Lisa Bekman | Project: 7401885-01 | Segment 1: Jun 1, 2022 - May 31, 2024

Create new subagreement

Subrecipient organization

Subrecipient principal investigator

Proposed start date

Proposed end date

Description Optional

Subrecipient contact information Optional

Add primary place of performance Yes No

Country

Address line 1

Address line 2 Optional

City

State/Province

Zip/Postal code

Congressional district Optional

Sub Entry on "Subrecipient addition at no additional cost" Request

HarvardGMAS The complexity of informal caregiving for Alzheimer's disease and rel...
PI Lisa Berkman | Project 7451886-01 | Segment 1 Jun 1, 2022 - May 31, 2024

Create new subagreement

Subrecipient organization

Subrecipient principal investigator

Proposed start date

Proposed end date

Description Optional

Subrecipient contact information Optional

Add primary place of performance Yes No

Proposed Budget Subrecipient IDC Policy: Excluded from IDC

Period 1 Sep 22, 2020 - Aug 31, 2021 -	<input type="text" value="\$0.00"/>
Period 2 Sep 1, 2021 - Aug 31, 2022 -	<input type="text" value="\$0.00"/>
Period 3 Sep 1, 2022 - Aug 31, 2023 -	<input type="text" value="\$0.00"/>
Period 4 Sep 1, 2023 - Aug 31, 2024 -	<input type="text" value="\$0.00"/>
Period 5 Sep 1, 2024 - Aug 31, 2025 -	<input type="text" value="\$0.00"/>
Total	<input type="text" value="\$0"/>

Request List Screen

Investigating bacterial contributions to TB treatment response: a focus on in-host pathogen dynamics

PI **Maha Farhat** Sponsor **NIH/NIAID** Segment **1 of 1** | Active
Fund **150274** Anticipated **\$3,536,376** Sep 22, 2020 - Aug 31, 2025
Obligated **\$1,438,623**

01-Investigating bacterial contributi... > Requests

Requests

[Related links](#) | [Info](#) | [Actions](#)

Request Id	Type	Status	Due	Requested amount	Comments									
6374088	Initial proposal	Awarded	Feb 5, 2020	\$3,662,774	(0)									
6404169	International collaboration and activities	Awarded			(0)									
6411263	Subrecipient addition at no additional cost	Awarded	Nov 25, 2020	N/A	(0)									
<table border="1"><thead><tr><th>Subrecipient</th><th>Description</th><th>Subagreement no.</th><th>Subrecipient PI</th></tr></thead><tbody><tr><td>Research Center Borstel – Leibniz-Center for Medicine and Biosciences</td><td></td><td>5119088</td><td>Christiane Gerlach</td></tr></tbody></table>							Subrecipient	Description	Subagreement no.	Subrecipient PI	Research Center Borstel – Leibniz-Center for Medicine and Biosciences		5119088	Christiane Gerlach
Subrecipient	Description	Subagreement no.	Subrecipient PI											
Research Center Borstel – Leibniz-Center for Medicine and Biosciences		5119088	Christiane Gerlach											
6436098	Continuation	Awarded	Jul 15, 2021	\$670,284	(0)									
6458630	Supplement	Submitted to sponsor	Apr 1, 2022	\$47,460	(0)									
6474932	Continuation	Submitted to sponsor	Jul 15, 2022		(0)									
6482792	Supplement	Submitted to sponsor	Oct 1, 2022	\$266,035	(0)									

"Subrecipient addition at no additional cost" Request Converted

01-Investigating bacterial contributi... > Subrecipient addition at no additiona...

Subrecipient addition at no additional cost

Request ID #6487281

Lock and route for signatures

Under development > Under review > Authorized > Submitted

Central reviewer
Unassigned

Actions required

Subrecipient(s) missing	Edit
Justification is missing	Edit

[Open all](#) | [Close all](#)

Central reviewer comments	0 comments	Add comment
Comments	0 comments	Add comment
Approvals	2 total 0 needed 1 attributes apply	
Submission requirements	No submission requirements	Edit
Accounts	5 total	
Documents	0 documents	Upload

Subagreement/Subamendment Workflow Enhancements

Requesting a Subagreement/subamendment Draft

Causal Machine Learning for Reliable Imaging-Based Clinical Prediction

PI: Kun-Hsing Yu Sponsor: NH/NIBIB Segment 1 of 1 Active
 Fund: 151722 Anticipated: \$1,500,000 Jul 1, 2023 - Jun 30, 2027
 Obligated: \$500,000

01-Causal Machine Learning for Reliab... > Subrecipients

Subrecipients

Related links Actions

Subrecipient #	Description #	Subagreement no. #	Status #	Subrecipient PI #	Start date #	End date #	
Brigham and Women's Hospital, Inc.		5125468	Sponsor Approved, Sub Pending	Shuji Ogino	Jul 1, 2023	Jun 30, 2027	Request subagreement and subamendment drafts Request subrecipient at no additional cost
Dana-Farber Cancer Institute		5125472	Sponsor Approved, Sub Pending	Jeffrey Meyerhardt	Jul 1, 2023	Jun 30, 2027	\$25,000
Stanford University		5125470	Sponsor Approved, Sub Pending	Graham Snyder	Jul 1, 2023	Jun 30, 2027	\$30,000

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement 5125468

Subagreement 5125468

Related links Request subagreement draft

Status: Sponsor Approved, Sub Pending
Subrecipient: Brigham and Women's Hospital, Inc.
Description:
Subrecipient principal investigator: Shuji Ogino
FFATA: N/A

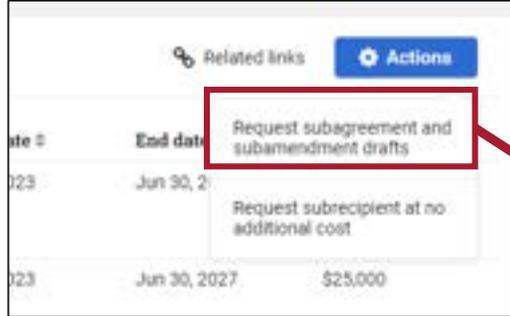
Key information
 4 do not apply. Show all

Open all Close all

Subagreement dates & dollars

	Authorized	Anticipated
Start date	Jul 1, 2023	Jul 1, 2023
End date	Jun 30, 2024	
Dollars	\$20,000	\$60,000

Requesting a Subagreement/Subamendment Draft



Select subrecipients that require a subagreement/subamendment

<input type="checkbox"/>	Subrecipient	Description	Sub no.	Status	Subrecipient PI	Start date	End date	Dollars
<input checked="" type="checkbox"/>	Brigham and Women's Hospital, Inc		5125468	Sponsor Approved, Sub Pending	Shuji Ogino	Jul 1, 2023	Jun 30, 2027	\$20,000
<input checked="" type="checkbox"/>	Dana-Farber Cancer Institute		5125472	Sponsor Approved, Sub Pending	Jeffrey Meyerhardt	Jul 1, 2023	Jun 30, 2027	\$25,000
<input type="checkbox"/>	Stanford University		5125470	Sponsor Approved, Sub Pending	Graham Snyder	Jul 1, 2023	Jun 30, 2027	\$30,000

Once Subagreement/Subamendment Drafts are Started

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement 5125468

Subagreement 5125468

Related links Request subagreement draft

Status Sponsor Approved, Sub Pending
Subrecipient [Brigham and Women's Hospital, Inc](#)
Description
Subrecipient principal investigator [Shuji Ogino](#)
FFATA Yes

Key information

✓ FFATA reporting
3 do not apply: [Show all](#)

[Open all](#) | [Close all](#)

Subagreement dates & dollars

	Authorized	Anticipated
Start date	Jul 1, 2023	Jul 1, 2023
End date	Jun 30, 2024	
Dollars	\$20,000	\$60,000

Subagreement and subamendments

1 total 0 fully executed

Type	Status	Dates	Dollars	Assigned to
Subagreement	Central review	Jul 1, 2023 - Jun 30, 2027		Arias

Related action memos

1 action memo

Once Subagreement/Subamendment Drafts are Started

01-Causal Machine Learning for Reliab... > Subrecipients

Subrecipients

Related links Actions

Subagreements and subamendments in process

Type	Subrecipient	Subagreement no.	Status	Assigned to
Subamendment 1	Brigham and Women's Hospital, Inc	5125468	Central review	Casky
Subagreement	Dana-Farber Cancer Institute	5125472	Under development	Unassigned

Subrecipients

Subrecipient ⇅	Description ⇅	Subagreement no. ⇅	Status ⇅	Subrecipient PI ⇅	Start date ⇅	End date ⇅	Dollars ⇅
Brigham and Women's Hospital, Inc		5125468	Active	Shuji Ogino	Jul 1, 2023	Jun 30, 2027	\$0
Dana-Farber Cancer Institute		5125472	Sponsor Approved, Sub Pending	Jeffrey Meyerhardt	Jul 1, 2023	Jun 30, 2027	\$25,000
Stanford University		5125470	Sponsor Approved, Sub Pending	Graham Snyder	Jul 1, 2023	Jun 30, 2027	\$30,000

Subagreement Data Entry

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement for 5125472

Subagreement for 5125472
Dana-Farber Cancer Institute
Jeffrey Meyerhardt

History (1) | Info | Lock and route | Settings

Under development | Central review | Ready for drafting | Drafting | With subrecipient | Partially executed | Fully executed

Request for subagreement draft started on Jan 5, 2023 by Jess Perreault

Completion priority Normal

Actions required

Special terms are missing	Edit
Dates and dollars are missing	Edit
FFATA statement of work summary is missing	Edit

Open all | Close all

Comments 0 comments [Add comment](#)

General information [Edit](#)

Primary performance location Incomplete [Edit](#)

Subrecipient contacts Incomplete [Edit](#)

Documents 0 documents [Upload](#)

Key information

- ✓ FFATA reporting
- 3 do not apply: [Show all](#)

Required Subagreement Data Entry

Action required

 Special terms are missing Edit

Pop-up window

Special terms ✕

Special reporting	<input type="radio"/> Yes	<input type="radio"/> No
Advanced payment	<input type="radio"/> Yes	<input type="radio"/> No
Exchange of human subjects data	<input type="radio"/> Yes	<input type="radio"/> No

Cancel Done

Panel

Special terms 1 applies 2 do not apply Edit ⊖

Special reporting	Yes
Advanced payment	No
Exchange of human subjects data	No

Required Subagreement Data Entry

Action required

 Dates and dollars are missing [Edit](#)

Pop-up window

Edit dates and dollars ✕

	Dates	Dollars
Sponsor approved	Mar 1, 2022 - Feb 28, 2023	\$80,413
Sponsor anticipated	Mar 1, 2022 - Feb 28, 2023	\$80,413

Number of periods:

Period	Anticipated start date	Anticipated end date	Anticipated dollars	Issued start date	Issued end date	Issued dollars	Carryforward	Total issued amount
1	<input type="text" value="03/01/2022"/>	<input type="text" value="02/28/2023"/>	<input type="text" value="\$80,413"/>	<input type="text" value="03/01/2022"/>	<input type="text" value="02/28/2023"/>	<input type="text" value="\$80,413"/>	<input type="text" value=""/>	\$80,413
Total	Mar 1, 2022	Feb 28, 2023	\$80,413	Mar 1, 2022	Feb 28, 2023	\$80,413	\$0	\$80,413

[Cancel](#) [Done](#)

Panel

Dates and dollars [Edit](#)

	Dates	Dollars
Sponsor approved	Mar 1, 2022 - Feb 28, 2023	\$80,413
Sponsor anticipated	Mar 1, 2022 - Feb 28, 2023	\$80,413
To issue for this agreement	Mar 1, 2022 - Feb 28, 2023	\$80,413

Anticipated		Issued		Carryforward	Total
Dates	Dollars	Dates	Dollars		
Mar 1, 2022 - Feb 28, 2023	\$80,413	Mar 1, 2022 - Feb 28, 2023	\$80,413		\$80,413
Total	\$80,413		\$80,413	\$0	\$80,413

Required Subagreement Data Entry

Action required

⚠ FFATA statement of work summary is missing Edit

Pop-up window

FFATA statement of work summary ✕

A summary of the statement of work with a 4,000 character maximum is required for any subagreements reportable under the Federal Funding Accountability and Transparency Act (FFATA). Please provide the summary below to be included with the FFATA submission.

Cancel Done

Panel

FFATA statement of work summary Edit ⊙

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Other Subagreement Data Entry

Pop-up window

Update general information ✕

Subrecipient: Stanford University

Subrecipient principal investigator:

Description: Optional

Subagreement type:

Panel

General information Edit ⊙

Subrecipient: Dana-Farber Cancer Institute

Subrecipient principal investigator: Jeffrey Meyerhardt

Subrecipient status: Sponsor Approved, Sub Pending

Description:

Subagreement type: Cost reimbursable

UEI number: DPMGH9MG1X67

Organization risk assessments ⊙

HU Fiscal year	FY Reviewed	Risk assessment status	Risk assessment date	Next assessment date
2021	2019	Green	Apr 6, 2021	Apr 30, 2024
2018	2016	Green	May 15, 2018	May 14, 2021
2017	2016	Green	Sep 26, 2017	
2016	2015	Green	Aug 3, 2016	
2015		Green	May 8, 2015	

Other Subagreement Data Entry

Pop-up window

Primary performance location ✕

Country

Address line 1

Address line 2 Optional

City

State/Province

Zip/Postal code

Congressional district Optional

Panel

Primary performance location Complete Edit ⊖

Address	Congressional district
123 Main Street Building 2 Cambridge, MA 01238-0000	08

Other Subagreement Data Entry

Pop-up window

The pop-up window has a title bar with the text "Edit subrecipient contact information" and a close button (X) in the top right corner. The main content area contains a label "Contact information" on the left and "Optional" on the right, with a large empty rectangular text input field in between. At the bottom center, there are two buttons: "Cancel" and "Done".

Panel

The panel has a title bar with the text "Subrecipient contacts" and an "Edit" button in the top right corner. The main content area contains a text area with the following Lorem Ipsum text: "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Morbi enim nunc faucibus a pellentesque sit amet. Tellus orci ac auctor augue mauris augue neque gravida in. Pulvinar neque laoreet suspendisse interdum consectetur libero. Eget duis at tellus at. Duis at tellus at urna condimentum mattis pellentesque id. Gravida neque convallis a cras. Senectus et netus et malesuada fames ac turpis egestas. At consectetur lorem donec massa sapien faucibus et molestie ac. Tempor nec feugiat nisl pretium fusce. Aenean vel elit scelerisque mauris pellentesque pulvinar. Aliquam sem fringilla ut morbi tincidunt augue. Eget est lorem ipsum dolor. Pretium vulputate sapien nec sagittis aliquam malesuada bibendum arcu. Nunc mi ipsum faucibus vitae aliquet nec ullamcorper sit amet."

Completion of Subagreement Data

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement for 5125472

Subagreement for 5125472

Dana-Farber Cancer Institute
Jeffrey Meyerhardt

History (1) | Info | Lock and route | Settings

Under development | Central review | Ready for drafting | Drafting | With subrecipient | Partially executed | Fully executed

Request for subagreement draft started on Jan 5, 2023 by Jess Perreault

Completion priority Normal

Key information

- ✓ FFATA reporting
- ✓ Special reporting

2 do not apply: [Show all](#)

[Open all](#) | [Close all](#)

Comments	0 comments	Add comment
General information		Edit
Special terms	1 applies 2 do not apply	Edit
Primary performance location	Complete	Edit
FFATA statement of work summary		Edit
Subrecipient contacts	Incomplete	Edit
Documents	0 documents	Upload

Subamendment Data Entry

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement 5125468 > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

History (1) | Info | Lock and route | ⚙️

Under development | Central review | Ready for drafting | Drafting | With subrecipient | Partially executed | Fully executed

Request for subamendment draft started on Jan 5, 2023 by Jess Perreault

Completion priority Normal

Actions required

Subamendment attributes must be selected. [Edit](#)

Key information

- ✓ FFATA reporting
- 3 do not apply: [Show all](#)

[Open all](#) | [Close all](#)

Comments 0 comments [Add comment](#)

General information [Edit](#) [+](#)

Subrecipient contacts Incomplete [Edit](#)

Documents 0 documents [Upload](#)

Required Subamendment Data Entry

Action required

 Subamendment attributes must be selected.

Edit

Pop-up window

Subamendment attributes ✕

Select all attributes that need updates for this subamendment

- Special terms and conditions
- Dates and dollars
- Primary place of performance
- FFATA statement of work summary
- Subrecipient principal investigator
- Other

Cancel Done

Panel

Subamendment attributes 6 attributes apply Edit ⊞

- Special terms and conditions
- Dates and dollars
- Primary place of performance
- FFATA statement of work summary
- Subrecipient principal investigator
- Other

Required Subamendment Data Entry

Action required

Actions required	
⚠ Special terms updates are missing	Edit
⚠ Dates and dollars updates are missing	Edit
⚠ Primary place of performance updates are missing	Edit
⚠ FFATA statement of work summary updates are missing	Edit
⚠ Change of subrecipient principal investigator missing	Edit
⚠ Other changes are missing	Edit

Panels

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement 5125468 > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

[History \(1\)](#) [Info](#) [Lock and route](#) [⚙](#)

Under development > Central review > Ready for drafting > Drafting > With subrecipient > Partially executed > Fully executed

Request for subamendment draft started on Jan 5, 2023 by Jess Perreault

Completion priority [Normal](#)

Key information

- ✓ FFATA reporting
- 3 do not apply: [Show all](#)
- [Open all](#) [Close all](#)

Comments 0 comments [Add comment](#)

Subamendment attributes 1 attribute applies [Edit](#) [⌵](#)

General information [Edit](#) [⌵](#)

Other changes [Edit](#) [⌵](#)

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Documents 0 documents [Upload](#)

Completion of Subamendment Data

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement 5125468 > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

History (1) Info Lock and route

Under development Central review Ready for drafting Drafting With subrecipient Partially executed Fully executed

Request for subamendment draft started on Jan 5, 2023 by Jess Perreault

Completion priority

Key information
✓ FFATA reporting
3 do not apply: Show all

Comments

Subamendment attributes

General information

Other changes

Quos et illa ut quam. Scripturis complector praecip
Vix has artificis perfectum eam persuadet praetere
via vereorque nul contingit imaginans. Puto mali cit

Documents

Edit priority

Completion priority

High priority reason

Cancel Done

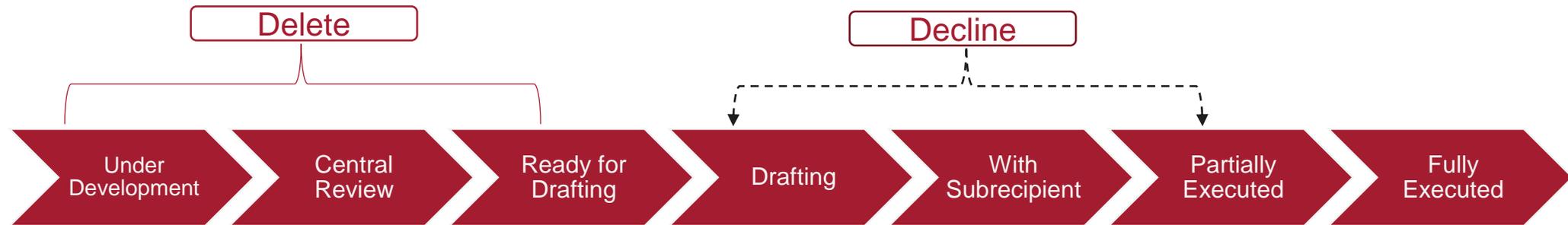
Subagreement/Subamendment Workflow Statuses



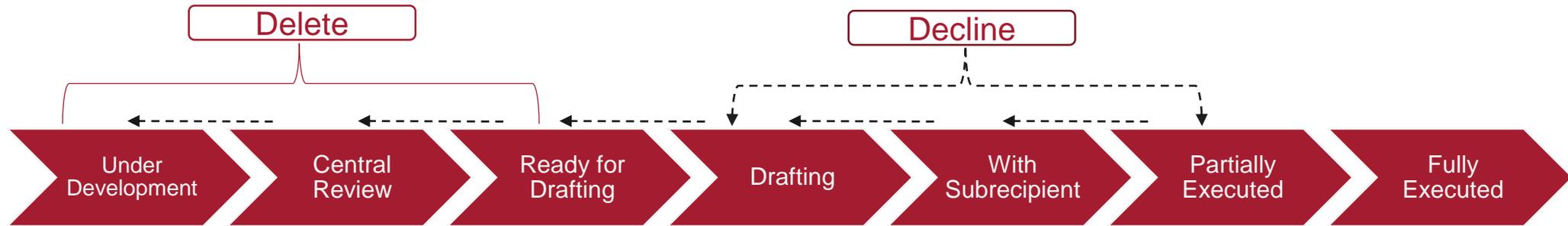
Subagreement/Subamendment Workflow Statuses



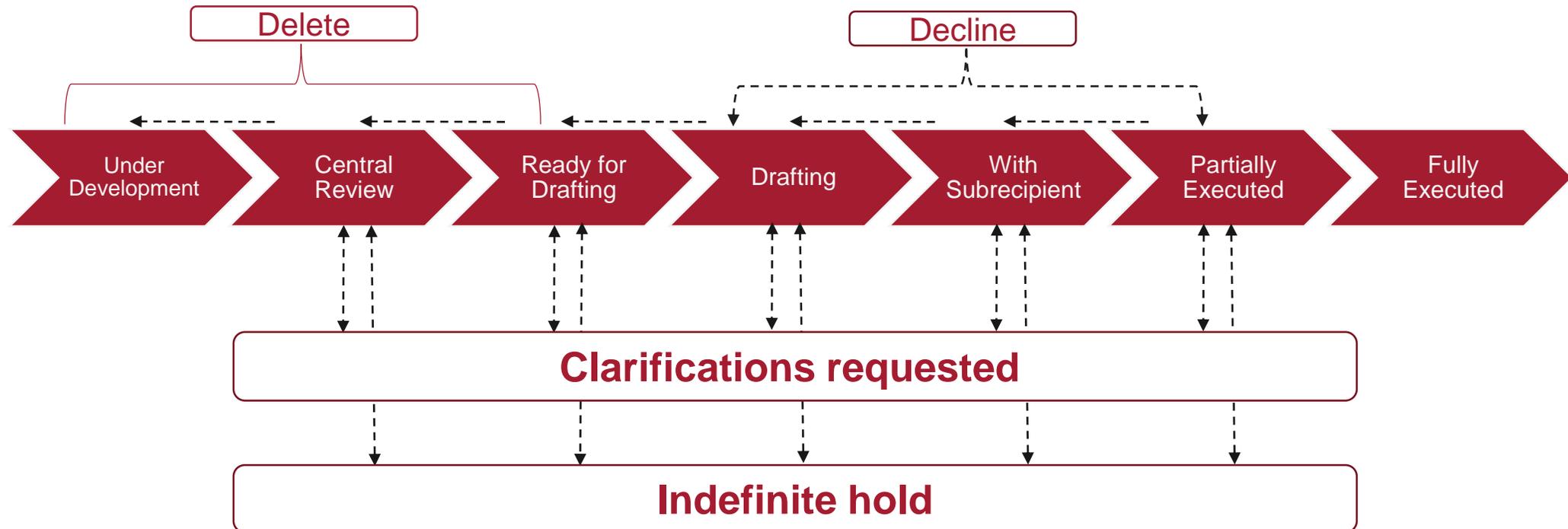
Subagreement/Subamendment Workflow Statuses



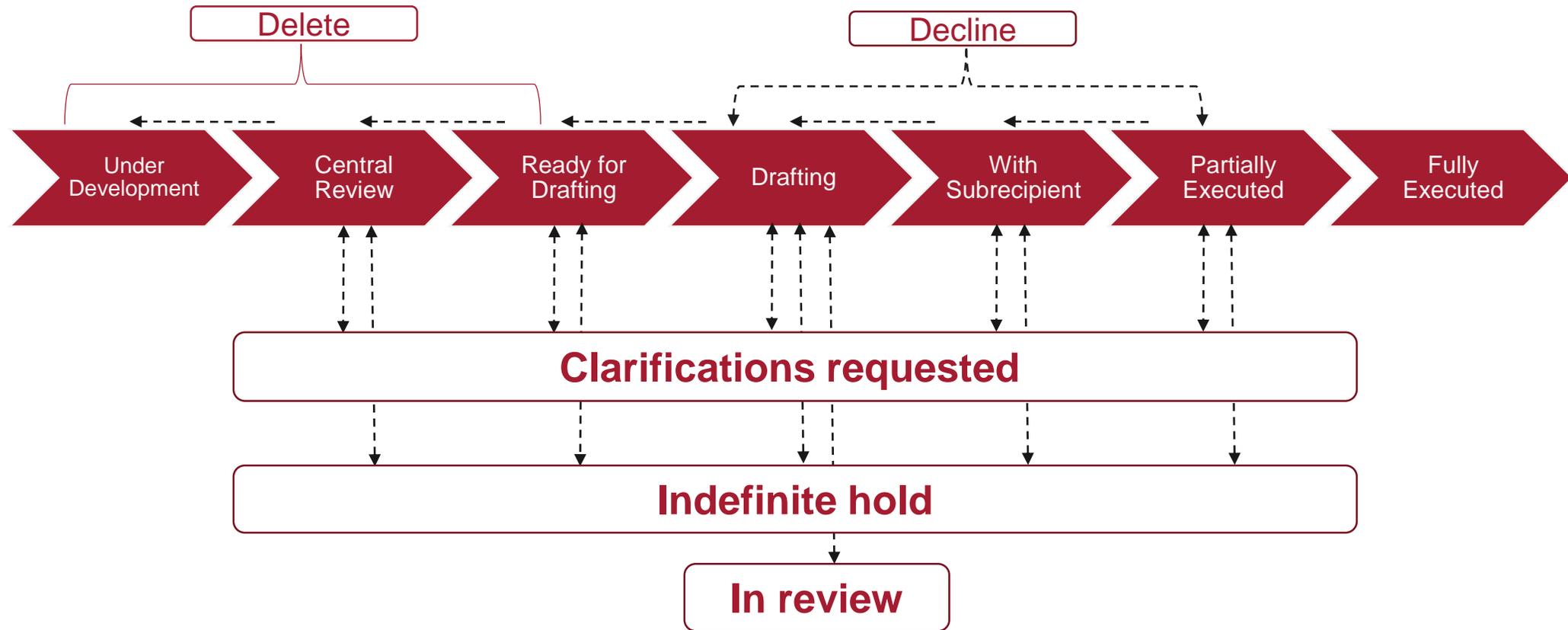
Subagreement/Subamendment Workflow Statuses



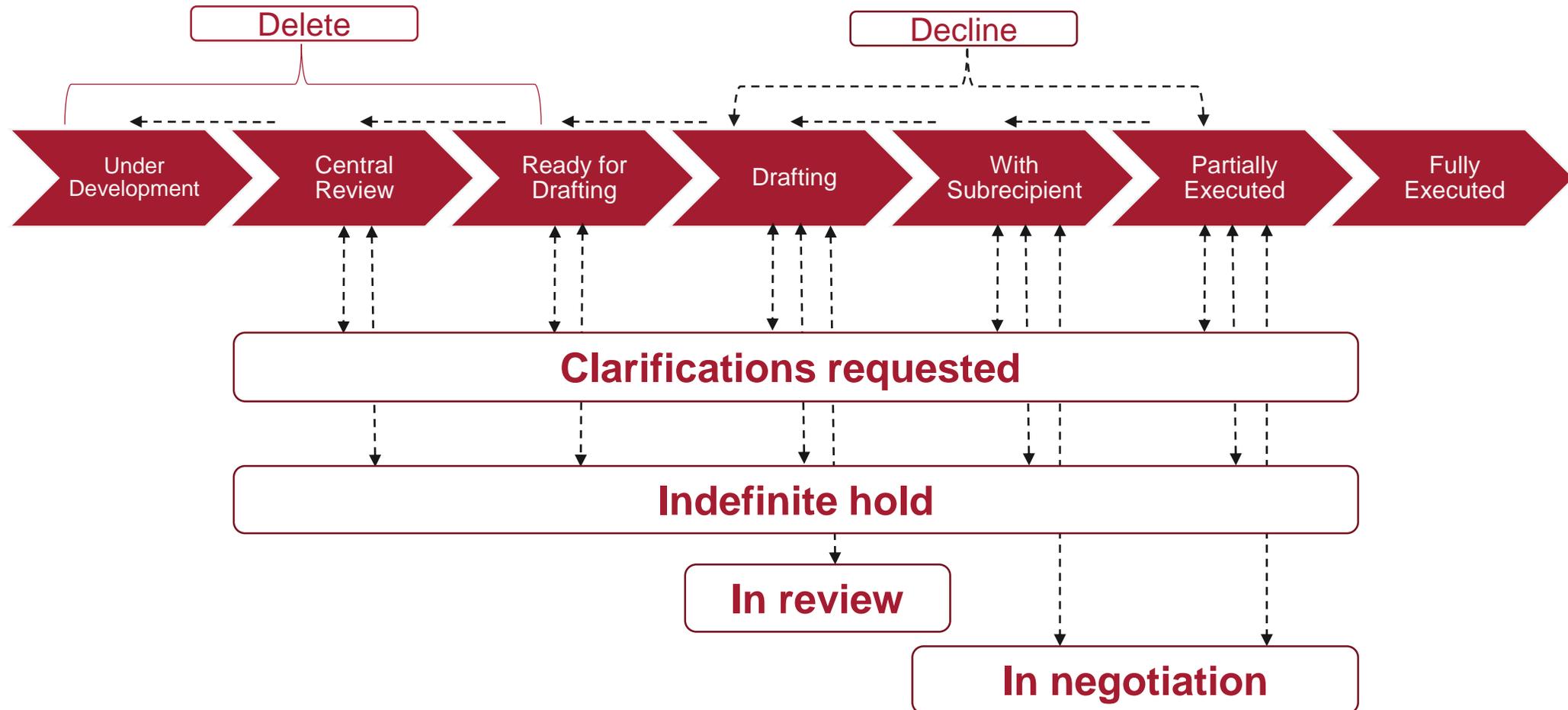
Subagreement/Subamendment Workflow Statuses



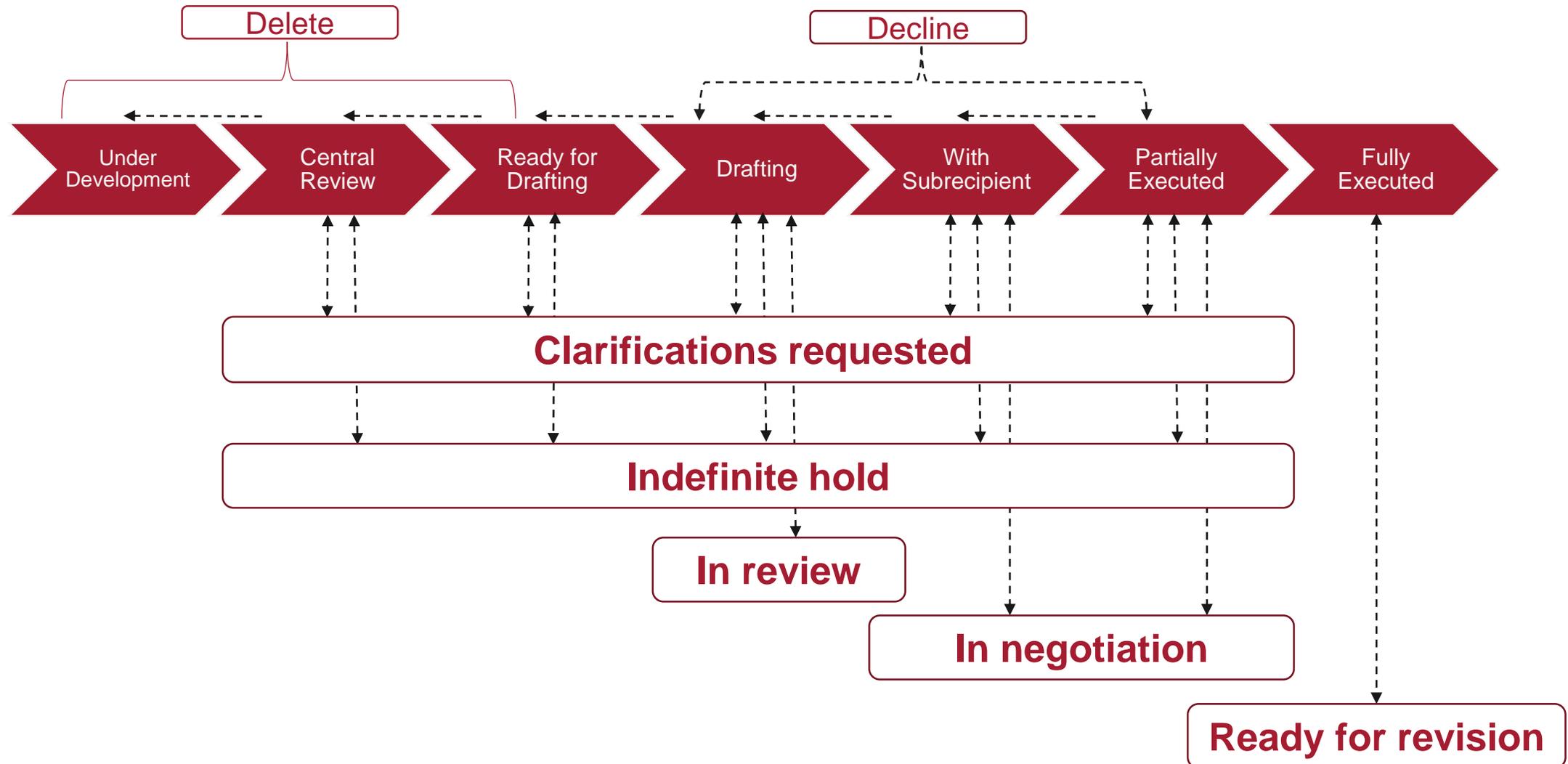
Subagreement/Subamendment Workflow Statuses



Subagreement/Subamendment Workflow Statuses



Subagreement/Subamendment Workflow Statuses



Moving Through the Workflow

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement 5125468 > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc

Shuji Ogino

History (2)

Info

Ready for drafting



Under development

Central review

Ready for drafting

Drafting

With subrecipient

Partially executed

Fully executed

Moved to Central review on Jan 5, 2023 by Jess Perreault

Status update comment Please let me know if you have any questions about this draft request.

Central reviewer Unassigned

Completion priority Normal

Key information

✓ FFATA reporting

3 do not apply: [Show all](#)

[Open all](#)

[Close all](#)

Moving Through the Workflow

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement 5125468 > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

History (2)

Info

Ready for drafting



History for Dana-Farber Cancer Institute | subagreement for 5125472

Date	Event	Created by	Details
Jan 5, 2023	Central review	Jess Perreault	Status update comment: "Please let me know if you have any questions about the subagreement."
Jan 5, 2023	Under development	Jess Perreault	

Fully executed

Key information

✓ FFATA reporting

3 do not apply: [Show all](#)

[Open all](#)

[Close all](#)

Moving Through the Workflow

01-Causal Machine Learning for Reliab... > Subrecipients > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

History (4) | Info | Remove from clarification | Settings

Clarifications requested

Under development → **Clarifications requested** → Ready for drafting → Drafting → With subrecipient → Partially executed → Fully executed

Primary status: Central review

Moved to Clarifications requested with Sunny Alvear on Jan 5, 2023 by Jess Perreault

Status update comment Can you clarify that you would like to decrease the original anticipated amount by 25,000?

Central reviewer Unassigned

Completion priority Normal

Key information

- ✓ FFATA reporting
- 3 do not apply: [Show all](#)

[Open all](#) | [Close all](#)

Moving Through the Workflow

01-Causal Machine Learning for Reliab... > Subrecipients > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

History (4)

Info

Remove from clarification



Under developmen

Clarifications requested

Ready for drafting

Drafting

With subrecipient

Partially executed

Fully executed

Primary status: Central review

Key information

Remove from Clarifications requested

Completion comments

Leave a comment

Cancel

Done



reporting

Apply: Show all

Close all

Moving Through the Workflow

01-Causal Machine Learning for Reliab... > Subrecipients > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

History (5)

Info

Remove from clarification



Under developmen

Clarifications requested

Ready for drafting

Drafting

With subrecipient

Partially executed

Fully executed

Primary status: Central review

Clarifications requested update provided on Jan 5, 2023 by Sunny Alvear

Status update comment I need to follow up with Yu. Please give me a day and I will update here with a response.

Show additional update comments

Central reviewer Unassigned

Completion priority Normal

Key information

✓ FFATA reporting

3 do not apply: [Show all](#)

Hide additional update comments

Can you clarify that you would like to decrease the original anticipated amount by 25,000?

Jess Perreault | Jan 5, 2023 6:42 PM

Moving Through the Workflow

01-Causal Machine Learning for Reliab... > Subrecipients > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc
Shuji Ogino

History (22) Info Record signature

Under development Central review Ready for drafting Drafting **With subrecipient** Partially executed Fully executed

Moved back to With subrecipient on Jan 5, 2023 by Jess Perreault
Status update comment Rollback

Subrecipient last contacted Jan 4, 2023: They reached back out and said they are reviewing and should return a signed copy in the next day or two.

[Hide additional update comments](#)

Jan 3, 2023: Reached out to Brigham for an update
Jess Perreault | Jan 5, 2023 8:17 PM

Jan 2, 2023: Sent to jsmith@bidmc.edu
Jess Perreault | Jan 5, 2023 8:17 PM

Central reviewer Sabrina Garcia
Drafter Sivan Ehrlich

Key information

- ✓ FFATA reporting
- 3 do not apply: [Show all](#)

Moving Through the Workflow

01-Causal Machine Learning for Reliab... > Subrecipients > Subamendment 1 for 5125468

Subamendment 1 for 5125468

Brigham and Women's Hospital, Inc

Shuji Ogino

 History (23) |  Info

Under development

Central review

Ready for drafting

Drafting

With subrecipient

Partially executed

Fully executed

Moved to Fully executed on Jan 5, 2023 by Jess Perreault

Subrecipient signature date Jan 5, 2023

Harvard signature date Jan 5, 2023

Central reviewer  Sabrina Garcia

Drafter  Sivan Ehrlich

Completion priority  Normal

Key information

 FFATA reporting

3 do not apply: [Show all](#)

[Open all](#)

[Close all](#)

Sub Dashboard

Sub Dashboard



Welcome, Jess



Info

Create an initial proposal

News

The Research Administration Portal was recently updated!

The [Research Administration Portal](#) now includes a researcher delegate option and To Do items for the Harvard Training Portal. For more information about these and other new features in the Portal, see the [support site](#).

Visit [GMAS](#) on the web for access to [blog articles](#), [job aids](#), [release notes](#), and more.

Head over to the [GMAS training environment](#) where you can train or play with no impact to real data.

Visit the [Office for Sponsored Programs](#) and check out the [OSP blog](#) for breaking news on research administration topics.

Visit the [Harvard Medical School Office of Research Administration](#).

Visit [Harvard T.H. Chan School of Public Health Research Administration](#).

Requests dashboard

Sub dashboard

Pending notices

Financial deliverable dashboard

Transaction monitoring dashboard

Receipts

Receivables

Recently viewed projects

100

Project

Fund

Tub

Org

Title

PI

Sponsor

Sub Dashboard

Harvard GMAS

Q
Advanced
People
Organizations
Links
Jess Perreault

Sub dashboard

Sub dashboard

Download
⚙

My portfolio
SPH
HMS
University Area
All

Sub #	Priority	Type	Status	Subrecipient	Description	Sub PI	Start date	Project/Fund	Harvard PI	Tub	Org	Last activity	Assigned to
<input type="text"/>	within <input type="text"/> days	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	within <input type="text"/> days	<input type="text"/>						
5125472	Normal	Subagreement	Central review	Dana-Farber Can...		Meyerhardt	Jul 1, 2023	151722	Yu	520	46334	Jan 5, 2023	Dunlap
5126250	Normal	Subagreement	Central review	Boston Universit...		Record01	Jun 1, 2022	134706	Harvard	370	31240	Jan 5, 2023	Chui
5126252	Normal	Subagreement	Central review	Boston Universit...		Record01	Jun 1, 2022	134707	Harvard	370	31240	Jan 5, 2023	Chui
5126258	Normal	Subagreement	Central review	Boston Universit...		Record01	Jun 1, 2022	134709	Harvard	370	31240	Jan 5, 2023	Armstrong
5126231	Normal	Subagreement	Partially executed	Arizona State Un...		Adgate	Jan 9, 2023	8429309	Aach	100	00332	Jan 5, 2023	Anderson
5126260	Normal	Subagreement	Ready for drafting	Boston Universit...		Record01	Jun 1, 2022	134710	Harvard	370	31240	Jan 5, 2023	Kaze
5111094		Subamendment	Ready for revision	Board of Trustee...	UAB AMP-Up Lite	Hutto	Aug 1, 2019	114205	Seage	275	23570		Unassigned

Sub dashboard

Sub dashboard

Download ⚙️

- My portfolio
- SPH
- HMS
- University Area
- All

Sub #	Priority	Type	Status	Subrecipient	Description	Sub PI	Start date	Project/Fund	Harvard PI	Tub	Org	Last activity	Assigned to
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Sub Dashboard

Sub dashboard

[Download](#)

My portfolio SPH HMS University Area **All**

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Sub Dashboard

Harvard GMAS Q Advanced People Organizations Links Jess Perreault

Sub dashboard

Sub dashboard

My portfolio SPH HMS University Area **All**

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Download ⚙️

Clear all filters

Set current filter as my default

Sub Dashboard

Harvard GMAS Q Advanced People Organizations Links Jess Perreault

Sub dashboard

Sub dashboard Download Settings

My portfolio SPH HMS University Area **All**

Sub #	Priority	Type	Status	Subrecipient	Description	Sub PI	Start date	Project/Fund	Harvard PI	Tub	Org	Last activity	Assigned to
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5111094		Subamendment	Ready for revision	Board of Trustee...	UAB AMP-Up Lite	Hutto	Aug 1, 2019	114205	Seage	275	23570		Unassigned

Sub Document Findability

Sub Document Findability

01-Causal Machine Learning for Reliab... > Requests > Initial proposal > Documents

Documents

Initial proposal # 6480409

Related links

Actions

Name	Category	Size	Uploaded by	Uploaded date
BWH Subaward (4)				
BWH_RR_SubawardBudget.pdf	Subagreement Budget 5125468 - BWH	755.4 KB	Shannon Gallagher	Sep 21, 2022 3:05 PM
BWH Budget Justification.pdf	Subagreement Budget 5125468 - BWH	99.8 KB	Shannon Gallagher	Sep 21, 2022 3:05 PM
Biosketch_Ogino.pdf	Subagreement 5125468 - BWH	179.7 KB	Shannon Gallagher	Sep 21, 2022 3:05 PM
BWH_SOI_Signed.pdf	Subagreement Statement of Intent 5125468 - BWH	344.4 KB	Shannon Gallagher	Sep 21, 2022 3:05 PM
DFCI Subaward (4)				
DFCI RR Budget.pdf	Subagreement Budget 5125472 - DFCI	445.9 KB	Shar	21, 2022 3:06 PM
Budget Justification DFCI.pdf		77.6 KB	Shar	3:06 PM
Biosketch Meyerhardt.pdf		145.7 KB	Shar	3:06 PM
Signed SOI SOW.pdf		1.1 MB	Shar	3:06 PM
Internal (1)				
Proposal Documents (2)				

1 files selected for upload

Choose files | Drop files here

Document Repositories.pdf Uploaded **Add description or category**

Enter description

Subagreement | Select a subagreement

Cancel Done

Subagreement Budget

5125472 - DFCI

Cancel Done

Add category

Sub Document Findability

Harvard QMAS

Subagreement 5125458

Type	Date	Size	Category	Uploaded by	Date
Subagreement	Jul 1, 2023	9.1 KB	Fully executed agreement	Jess Perreault	Jan 5, 2023 9:29 PM
Subamendment	Jul 1, 2023	5.7 KB	Fully executed agreement	Jess Perreault	Jan 5, 2023 9:28 PM

Subagreement and subamendments

2 total | 2 fully executed

Type	Status	Dates	Dollars	Assigned to
Subagreement	Fully executed	Jul 1, 2023 - Jun 30, 2027		Unassigned

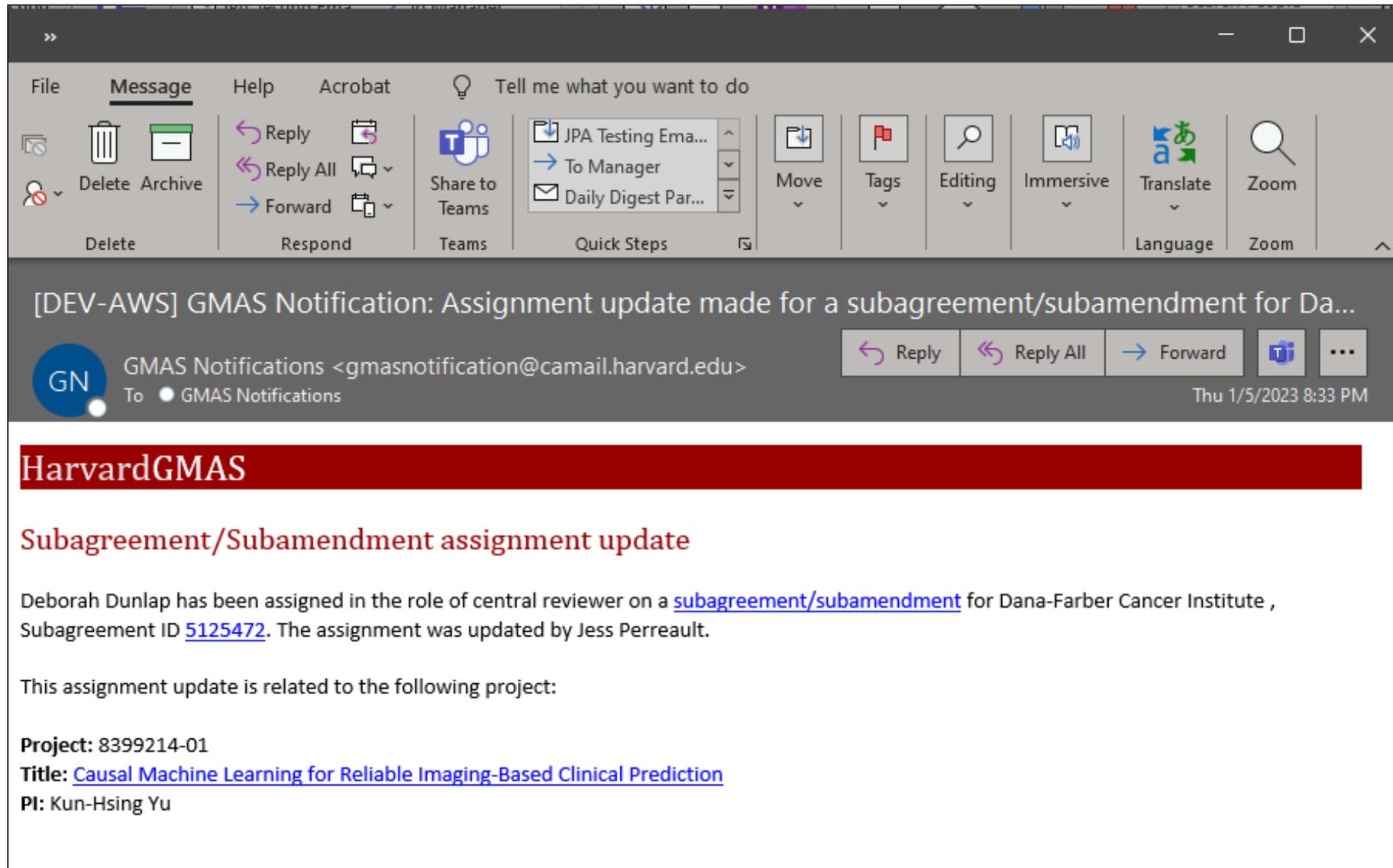
Filename	Category	Size	Uploaded by	Date
Fully executed subagreement_1-5-23.pdf	Fully executed agreement	9.1 KB	Jess Perreault	Jan 5, 2023 9:29 PM
Sub budget.xlsx	Fully executed agreement	5.7 KB	Jess Perreault	Jan 5, 2023 9:28 PM

Type	Status	Dates	Dollars	Assigned to
Subamendment 1	Fully executed	Jul 1, 2023 - Jun 30, 2027		Unassigned

Filename	Category	Size	Uploaded by	Date
Fully Executed Amendment.pdf	Fully executed agreement	9.1 KB	Jess Perreault	Jan 5, 2023 9:31 PM

Sub Notification Preferences

Sub Notification Preferences



The screenshot shows an Outlook window with a message from GMAS Notifications. The message subject is "[DEV-AWS] GMAS Notification: Assignment update made for a subagreement/subamendment for Da...". The sender is GMAS Notifications <gmasnotification@camail.harvard.edu>. The message content includes a red header "HarvardGMAS" and a subheader "Subagreement/Subamendment assignment update". The main text states: "Deborah Dunlap has been assigned in the role of central reviewer on a [subagreement/subamendment](#) for Dana-Farber Cancer Institute , Subagreement ID [5125472](#). The assignment was updated by Jess Perreault." It also mentions that the update is related to a project: "Project: 8399214-01", "Title: [Causal Machine Learning for Reliable Imaging-Based Clinical Prediction](#)", and "PI: Kun-Hsing Yu".

Sub Notification Preferences

01-Causal Machine Learning for Reliab... > Subrecipients > Subagreement for 5125472

Subagreement for 5125472

Dana-Farber Cancer Institute
Jeffrey Meyerhardt

History (3) | Info | Ready for drafting | ⚙️

Rollback
Delete
Turn notifications on
Request clarifications
Indefinite hold

Open all | Close all

Under development → **Central review** → Ready for drafting → Drafting → With subrecipient → Partially exe

Moved to Central review on Jan 5, 2023 by Jess Perreault
Status update comment Please let me know if you have any questions about the subagreement.

Central reviewer Deborah Dunlap

Completion priority Normal

Sub Notification Preferences

- Profile
- To-dos
- Portfolio
- Notification preferences**
- Documents
- Loans
- SW

Notification preferences for Jess Perreault

Related links Info

Notification type	On	Off	Action
Digest	0	2	Edit <input data-bbox="1299 639 1324 654" type="button" value="+"/>
Subagreements and subamendments	0	25	Edit <input data-bbox="1299 696 1324 711" type="button" value="+"/>

Edit subagreement and subamendment notification preferences

Notification type	Notification preference
Under development	<input checked="" type="checkbox"/>
Control review	<input type="checkbox"/>
Ready for drafting	<input type="checkbox"/>
Drafting	<input type="checkbox"/>
With subrecipient	<input type="checkbox"/>
Partially executed	<input type="checkbox"/>
Fully executed	<input type="checkbox"/>
Move to negotiation	<input type="checkbox"/>
In negotiation update	<input type="checkbox"/>
Move to clarifications required	<input type="checkbox"/>
Clarifications required update	<input type="checkbox"/>
Move to indefinite hold	<input type="checkbox"/>
Indefinite hold update	<input type="checkbox"/>
Move to in review	<input type="checkbox"/>
In review update	<input type="checkbox"/>
Declined	<input type="checkbox"/>
Assign drafter	<input type="checkbox"/>
Assign control reviewer	<input type="checkbox"/>
Assigned for clarifications	<input type="checkbox"/>
Assigned for negotiations	<input type="checkbox"/>
Assigned for hold	<input type="checkbox"/>
Assigned for review	<input type="checkbox"/>

Other Enhancements and Bug Fixes

Other Enhancements and Bug Fixes

Some additional enhancements and bug fixes include:

- **"Email this page" link** has been added to the segment homepage.
- Added a new **risk assessment** status of "Assessment not required" to the "Risk assessments" section of external organizations.
- Fixed a bug related to **faculty** on leave not properly displaying as faculty on all research team screens.
- Fixed a bug on the **cost sharing** form where attempting to navigate beyond the 5th budget period resulted in an error.
- And many more...

A full listing of other enhancements, bug fixes, and technical updates will be available when the release notes are published.

Subagreement Workflow Benefits

Benefit/Impact of the Upcoming Changes

By focusing our 3 key project goals, we expect to realize numerous benefits that will positively impact your day-to-day activities:

Increase efficiency

- Reduced manual entry and reliance on shadow systems/spreadsheets for subawards
- Option to opt in/out of status update notifications regarding subawards in your portfolio.
- Flexible assignment process can reduce number of handoffs from when the department initiates the subaward to when someone starts drafting
- More complete subaward home page; initiating the subaward requires more info up front rather than creating a “shell,” but this will ensure everything like project-specific info and required documents are ready before we get to drafting.
- All subaward documents viewable in one place, with category feature, rather than having to go to multiple folders across the GMAS segment or in another system.
- Easier rollback/clarification process directly in GMAS, more options to deviate from the normal workflow and put subawards in “indefinite hold” or “in negotiations.”
- Ability to provide coverage in absence of colleague is greatly enhanced with all information in one place, and statuses clearly defined

Improve Transparency

- Sortable/filterable Subagreements Dashboard directly in GMAS, similar functionality to other GMAS Dashboards we are familiar with.
- Clear visibility on who each subaward is assigned to in real time.
- New, more granular statuses of subawards throughout the workflow directly in GMAS, beyond just “sub pending” and “active.”
- Departments can see “With Subrecipient” status directly in GMAS, which can help paint a more accurate picture of why subawards “take so long.”
- Departments can request (and justify) “high priority” subawards directly in GMAS.
- Subrecipient info and risk assessment clearly visible on subaward homepage.



Reduce Reliance on email and other systems

- Department and Central Offices have ability to add comments and request/provide clarification directly in GMAS.
- Reduced manual entry and reliance on shadow systems/spreadsheets for subawards.
- Fewer status emails, department users could follow up with their counterparts directly if status is “With Subrecipient.”
- More info contained in GMAS for everyone’s future reference, comments and history, etc. rather than in shared drive, emails.

Subagreement Training

GMAS Subagreement Training



- 30-minute Overview Course
- 30-minute Demo Course
- **Available on HTP the week of 1/23**
- Email notifications will be sent with links when posted

- Invitations have been sent to Central Administrators with a hands-on role managing subagreements
- **HMS: February 8th**
- **HSPH: February 13th**
- **OSP: February 10th**

- Invitations/Registration have been sent for session on **February 16th**
- Session will be recorded and posted to HTP

- University Wide Business Process
- Job Aids

- Multiple sessions focused on different roles
 - Departments
 - Central Admins
- Invitations/Registration to be sent closer to the release date

Questions?

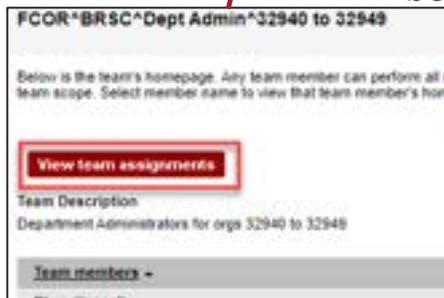
Appendix

Portfolio Management

- Portfolios in GMAS represent all active and pending segments someone plays a role on across GMAS segment administrative teams.
- Individuals can be added to a GMAS segment “Administrative team” either based on an assignment from a standing team, or manually from the segment by a Department Administrator or Central representative.
- Portfolios can become incorrect when someone has transitioned portfolios or jobs, but the activity to clean up their GMAS portfolio hasn’t been completed, or their standing team assignments haven’t been cleaned up.

Portfolio Management

- To clean up your portfolio:
 - First, you should check that your standing team assignments are what you expect them to be. If your standing team assignments are incorrect, you will continue to default onto projects that you no longer support.
 - Navigate to your person profile and expand the “Teams” panel
 - Select the link(s) for the team you are on
 - Select View team assignments
 - This will open a listing of all assignments on that standing team
 - If the scope of the team is large, you can select “Download this page” and filter by your name to see the listing of orgs and PIs you are associated to.
 - When segments are created with that combination of org and PI, you will default on the administrative team with the specified role where you see your name.
 - If your results look incorrect, you can reach out to the standing team owner for help in getting the assignments corrected before cleaning up your portfolio.



Portfolio Management

- Once standing team assignments have been validated/corrected
 - Navigate back to your person profile or the person drop down menu from the GMAS header
 - Select “Portfolio”
 - This will open a listing of all segment and role combinations in your portfolio
 - If there are any segments in your portfolio that you should no longer be on, you can perform the following action to clean it up:
 - Select “Reassign project roles”
 - Select the checkbox next to each segment and role combination that you should no longer be in your portfolio
 - Select <OK> at the bottom of the screen
 - Once you select OK you will be removed from that role on the Administrative team for the selections made
 - If you are not on a standing team with the org, you will no longer be able to access the project. You do not need to have assignments on a standing team to access projects, you just need to be on the team (with or without assignments) to navigate there without being on the administrative team
 - This action will also **ensures that you no longer receive notifications related to the segments removed, and those segments no longer appear in the “My portfolio” views on GMAS dashboards.**



Visit the [“How to update a portfolio in GMAS”](#) job aid