

Q1. How do I determine the contract type for an award or project?

There are two ways to determine the contract type for an award or project: through **ORBIT report RHi013** (*login to Power BI*) or from the **Grant Notification Report (GNR)** (*emailed to the PI and housed in OnBase*).

Listed below are the contract types and definitions of each. Contract types are typically identified in ORBIT and in the Grant Notification Report by their acronyms.

- **Cost Reimbursable (CRB)** – When expenses are incurred, invoice for reimbursement and recognize revenue.
- **Letter of Credit (LOC)** – Federal Agency Cost Reimbursable Awards. When expenses are incurred, invoice for reimbursement and recognize revenue.
- **Scheduled/Prepays (SCH)** – Base invoicing on the payment schedule per contract and/or deliverables/milestones. Recognize revenue when the expense is incurred.
- **Fixed Price (FIX)** – Invoice Sponsor based on information received from the department. (Non-industry Sponsored grant funded.) Recognize revenue when the Sponsor is billed.
- **Not-Billed in PeopleSoft (NBP)** – Industry -Sponsored Clinical Trials. Invoices created in Velos and revenue recognized when booking payment.

To view the contract type in ORBIT:

From the **Tools** page of the UTSW intranet, click the option for **ORBIT**.

The screenshot shows the UTSW Medical Center intranet. The top navigation bar includes 'About Us', 'Administration', 'Departments & Centers', 'Education', 'Hospital & Clinics', 'Human Resources', 'Research', 'Services', and 'Tools'. The 'Tools' menu item is highlighted with a green box. Below the navigation bar, the 'Tools' page is displayed with a dark blue header. The main content area lists various tools and services, including 'A-Z Index', 'ADAPT', 'Archibus', 'Clinical Trials', 'Compliance Report', 'CORE LIMS', 'Doctor & Faculty Profiles', 'eAgreements', 'eGrants', 'i2b2 Clinical Research Data Warehouse Study Feasibility Application', 'Kronos', 'Library', 'MyChart', 'myTime Login', 'Net Guide', 'ORBIT - UTSW Reporting Portal', 'Outlook Web App (Children's)', 'Profiles (Updates to faculty profiles)', 'ReadySet', 'REDCap', 'Research Portal', 'Talent Acquisition Management', 'Taleo Learn', 'TOPAZ', 'Total Professional Effort', and 'TracDat'. The 'ORBIT - UTSW Reporting Portal' link is highlighted with a green box, and a red arrow points from the 'Tools' menu item to this link.

To view the contract type in the Grant Notification Report:

Here is a portion of a Grant Notification Report (GNR) and how fields are defined. If a grant is awarded and set up in PeopleSoft, the PI and select department contacts will receive a copy GNR. The Award Setup Team will upload a copy of the GNR to Onbase, which will then be accessible through PeopleSoft. *NOTE: If unable to access the GNR in PeopleSoft due to permission levels, please request the GNR from your Department Administrator, who should have permission.*

On the GNR, review the section under **Award Information** and locate the contract type in the **Pay Method** field. *NOTE: The terminology used to identify contract type is referred to as Pay Method.* In this example, the contract type is **LOC**.

UT Southwestern
Medical Center

Grant Notification Report

Notification Reason: *** Please consider this document as an official notice of Award Activation and Budget Setup. ***

Award Information:

Award PI:
Award Title:
Award ID:
Ref. Award Number:
Sponsor Name:
CFDA #:
Project Start Date:
Project End Date:
Pay Method: LOC
Award Status: ACTIVE

Total Project Amount: \$5,783,872.00
Total Current Budgeted Amount (To-Date): \$1,814,829.00

Below example shows how fields are defined in the GNR's **Award Information** section.

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Grant Notification Report

Notification Reason: *User selection on the Run Control page*

AWARD INFORMATION

Award PI: Award Profile - PI Name
Award Title: Award Profile - Title
Award ID: CONTRACT_NUM
Ref. Award Number: REF_AWD_NUMBER
Sponsor Name: Award Profile - Sponsor
CFDA #: CFDA - DESCR
Award Start Date: Award BEGIN_DT
Award End Date: Award END_DT
Pay Method: Contract Type
Award Status: STATUS