



The Research Foundation for the State University of New York Pre-Award and Compliance System (SUNY PACS)

Campus Manager Guide

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Date	Author	Change Reference
10/1/2016	Lisa Kelly	Created Document V1.0
2/26/17	Lisa Kelly	Changes from 1 st review Meeting V1.1
3/22/17	Lisa Kelly	Changes from 2 nd review Meeting V 2.0
6/20/17	Lisa Kelly	Added Additional Grants Setup
4/30/18	Lisa Kelly	Updates for Portal8 Upgrade
11/19/2018	Chris Chen	Added Additional Grants Setup Options 9 and 10

1. Introduction

This guide is intended for use by the Campus Manager (CM) while processing any campus specific system changes needed for SUNY PACS applications. These changes will be infrequent and should not require monthly maintenance.

The CM is responsible for carrying out changes and upkeep to the following:

- Campus address and related information
- Campus specific appearance
- Module offices
- Module reviewers
- Organization details
- Module specific setups

Note: If there are mass changes needed, for example Campus address changes, please contact Customer Services for assistance.

2. Common Application Setup

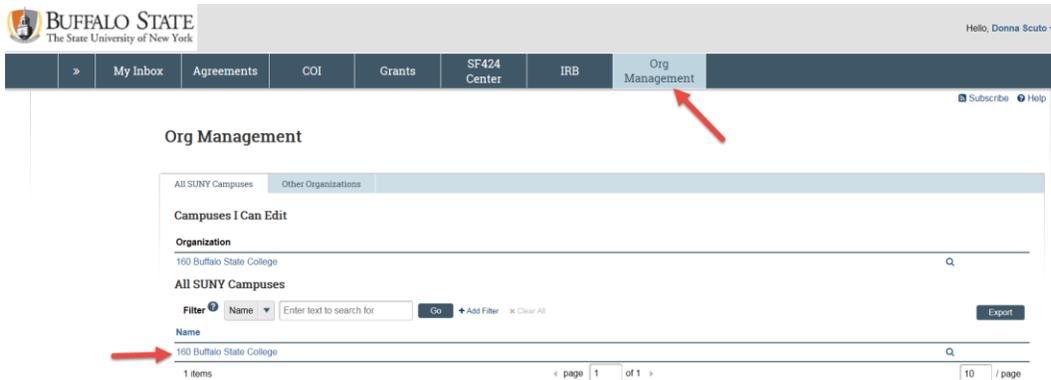
A. Campus Details

Purpose:

The below section describes the steps needed to maintain/change detailed information about each campus. This includes the campus address, email address, phone number and DUNS number.

1. Select Org Management Tab. (See Section 2: A: Figure 1)
2. Click on the campus Name. (See Section 2: A: Figure 1)

Section 2: A: Figure 1



3. Click on the Detail link that appears on the left to open up the Organization Details. Complete or update campus address and DUNS number. Click APPLY or ok after changes are made. (See Section 2: A: Figure 2)

Important: This address and DUNS number are used for the grants.gov submission. If this is incorrect or left blank the user will get a validation error on the SF424 submission. The RF Legal name is used for Grants in the submission of the SF424.

Section 2: A: Figure 2

Organization

Name: 160 Buffalo State College
 RF Legal Name: Research Foundation for SUNY on behalf
 ID: DPT-1492
 Category: Institution
 RF Sponsor Type: [None]
 Parent Organization: Campus Hierarchy

Web Page Address:
 Logo: [Choose File]
 Created: Tuesday, September 6, 2016 12:52:29 PM
 Modified: Tuesday, April 17, 2018 10:27:48 AM
 DUNS Number: 127247320000

Phone
 Phone: 716-
 Fax:

E-mail
 General:

Address
 Street/PO Box: 1300 Elmwood Ave.
 Buckham Hall B206
 City: Buffalo
 State/Province: NY
 Zip/Postal: 14222-1095
 Country: USA

Billing Address
 Street/PO Box:
 City: Buffalo
 State/Province: NY
 Zip/Postal: 14222-1095
 Country: USA

NOTE:

The following 3 fields in the detail organization page (See Section 2: A: Figure 3) are settings that the RF currently does not use;

- Managers – Not used by the RF
- IRB Authorization Agreement – Not used by the RF
- Can this organization be used as a funding source for clinical trials?- Not used by the RF

Section 2: A: Figure 3

Managers

There are no items to display

IRB Authorization Agreement

There are no items to display

Can this organization be used as a funding source for clinical trials?
 Yes No [Clear](#)

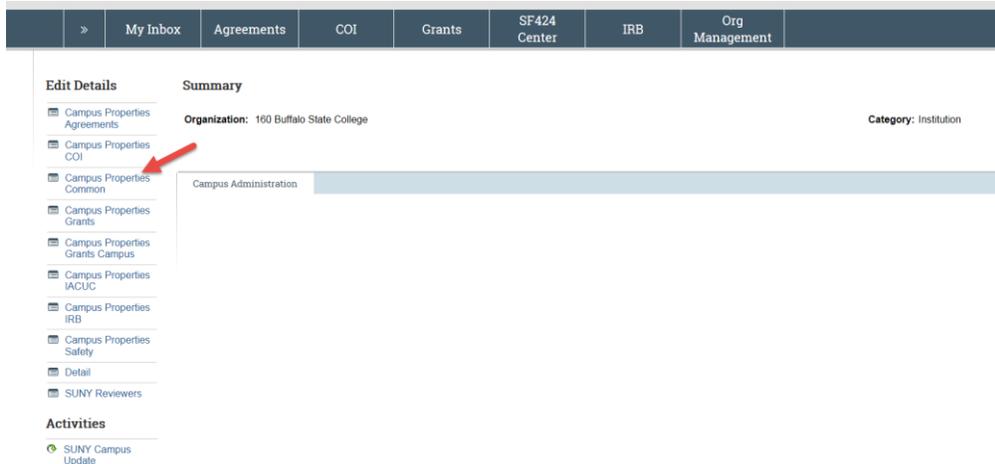
B. Maintain Campus Specific Appearance

Purpose:

The below section describes how to maintain the logo, header and footer for each campus.

1. Select Org Management Tab. (See Section 2: A: Figure 1)
2. Click on the campus Name. (See Section 2: A: Figure 1)
3. Select Campus Properties Common on the left hand side.(See Section 2: B: Figure 1)

Section 2: B: Figure 1



4. Make any changes needed for system appearance or email notifications. (See Section 2: B: Figure 2), below are descriptions of each field and the impact they have on how the system works. Once complete, select OK and Apply.

Field Name	Field Description
a. SUNY Site Logo	This field controls what campus logo will appear in the top left hand corner of the site.
b. SUNY Campus CSS	Custom Style Sheet, this changes colors and look and feel of pages.
c. SUNY Site Footer	The information in this box will display as a footer of every page for this campus.
d. SUNY Watermark Text	This is ONLY for the IRB module. It prints the contents on the top of the finalized documents. This is ONLY for the PDF version of the documents.
e. From Email Address	The email address that is used to send all SUNY PACS notifications.
f. Reply-to Email Address	The email address that is used when users reply to all SUNY PACS notifications.
g. Solution Specific Address	This allows a different to and from email address by SUNY PACS module. If there are values in these fields they take precedence over the above Reply-to and From

	emails. (Note: Must be in the compliance store to update IRB, Safety and IACUC modules).
h. Campus Code	Campus Code, is defaulted in and should not be changed.

Section 2: B: Figure 2

Jump To ▾
OK
Cancel
Apply

Campus Specific Appearance

SUNY Site Logo:
Please make sure to set the Site Logo on Compliance store as well for this campus. The Site Logo will be displayed at the top left corner on every page of this site.

Choose File
View

SUNY Campus CSS:^{CPIP}
This CSS is used to render a unique display for this campus. Enclose your CSS script within the <style></style>. E.g. <style>body{background-color: lightblue;}</style>

SUNY Site Footer:^{CPIP}
The text below will be displayed at the footer section of every page for this campus.

For help please email click-support@buffalostate.edu

Campus Specific Properties

SUNY Watermark Text:^{CPIP}
This text is used as watermark on finalized documents for IRB projects.

Finalized Buffalo State College

The From and Reply-To addresses are used for all notifications sent from this store (if specified, they override the From and Reply-To addresses specified in the Global Notification Settings). Further, if Solution Specific Addresses are specified then they override everything and are used for all notifications for that solution.

From Email Address:^{CPIP}

click-support@buffalostate.edu

Reply-To Email Address:^{CPIP}

click-support@buffalostate.edu

Solution Specific Address:

+ Add

	Solution Type	From	Reply-To
<input checked="" type="checkbox"/> Update	Agreements	click-agreements@buffalostate.edu	click-agreements@buffalostate.edu
<input checked="" type="checkbox"/> Update	COI	click-coi@buffalostate.edu	click-coi@buffalostate.edu
<input checked="" type="checkbox"/> Update	Grants	click-support@buffalostate.edu	click-support@buffalostate.edu

Campus Code:

160

Campus:¹
160 Buffalo State College

Campus > Division > Department > ...¹
160 Buffalo State College

¹ Updated by nightly process
CPiP CPiP syndicates this property to Compliance store

3. Agreements Module Maintenance

There are no campus level functionality settings that need to be maintained by the campus manager for the Agreements module.

4. Institutional Review Board (IRB) Module Maintenance

Purpose:

The below steps are used to maintain 13 settings (listed under step 3) within the IRB module for each campus.

1. Select Org Management Tab. (See Section 2: A: Figure 1)
2. Click on the campus Name. (See Section 2: A: Figure 1)
3. Select Campus Properties IRB on the left-hand side and then select Click here to edit to go to the compliance store. Then select Campus Properties IRB to edit. (See Section 4: Figure 1))

Section 4: Figure 1

The screenshot shows a navigation bar with tabs: My Inbox, Agreements, COI, Grants, SF424 Center, IRB, and Org Management. Below the navigation bar is a sidebar menu under 'Edit Details' with the following items: Campus Properties Agreements, Campus Properties COI, Campus Properties Common, Campus Properties Grants, Campus Properties Grants Campus, Campus Properties IACUC, Campus Properties IRB (highlighted with a red arrow), Campus Properties Safety, and SUNY Reviewers. Below the sidebar is an 'Activities' section with 'SUNY Campus Update'.



Campus Specific Properties - IRB

This data is managed by the Compliance store.

[Click here to edit](#) (highlighted with a red arrow)



The screenshot shows a navigation bar with tabs: My Inbox, Agreements, and COI. Below the navigation bar is a sidebar menu under 'Edit Details' with the following items: Campus Properties Agreements, Campus Properties COI, Campus Properties Common, Campus Properties Grants, Campus Properties IACUC, Campus Properties IACUC Strains/Species, Campus Properties IRB (highlighted with a red box), Campus Properties IRB - Funding Sources, Campus Properties Safety, COI Properties, Detail, Grants Properties, and Summary. The main content area is titled 'Summary' and shows 'Organization: 160 Buffalo State College'. Below this is a 'Details' section with the following information: Organization Name: 160 Buffalo State College, ID: DPT-1492, Category: Institution, Parent Organization: Campus Hierarchy, Phone: 716-716-716, Fax: 716-716-716, Address: Street/PO Box: 1300 Elmwood Ave, Buckham Hall B206, City: Buffalo, State/Province: NY, Zip/Postal: 14222-1095, Country: USA.

4. The Campus Specific Properties-IRB form will display. Update any of the 13 fields related to the IRB Module: (See Section 4: Figure 3)

Field Name	Field Description
a. Enable Attestation?	If "yes" then study team members will receive email prompting attestation upon study submittal. If "No" they will not receive an email .
b. Notify IRB Coordinator and Director on Submittal of IRB Study?	If "Yes" all IRB Directors and Coordinators will receive email notification when PI submits study. If "No" they will not receive an email.
c. Notify IRB Coordinator and Director on Ancillary and Designated Review submission?	If "Yes" all IRB Directors and Coordinators will receive email notification when the assigned reviewer submits their review of the study. If "No" they will not receive an email.
d. Enable COI/IRB Integration?	Yes/No selection. If yes, upon submission of a IRB Study that is funded and the PI is not a student. A research COI disclosure will be automatically be created for the PI and Study team members.
e. Enable Designated Reviewer Request Clarification activity?	Yes/No selection. If yes, the designated reviewer can request clarification directly to the PI on the study.
f. Default IRB Office	This is the IRB office automatically assigned when a PI submits a study.
g. Available IRB Office	All available IRB offices at a campus. A campus can have as many IRB offices as needed.
h. External IRB Office	An IRB office outside a given institution that will review this study and decide whether to approve it - with permission from the local (your institution's) IRB office.
i. IRB Library	Documents that are available within the IRB module such as Policies and procedures. The document Library is shared with Safety and IACUC so the list will contain all documents and are not segregated by campus. Use caution when selecting documents and review the document description. When we say NOT secure by campus this is only for the Campus Manager view and NOT for the PI's view of the documents. NOTE: If a specific library document is not in the LOV to select, Contact customer services to load the Document.
j. Ancillary Reviewers	All users at a given location are available to be ancillary reviewers. No maintenance is needed via this setting.
k. IRB Campus Logo	The image loaded here will appear in the header of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.

l. IRB Campus Footer	The image loaded here will appear in the footer of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.
m. Send Email to IRB Coordinator when they are assigned via Assign Coordinator activity	If "Yes" the assigned coordinator will receive an email when assigned to a study.

Section 4: Figure 3

Campus Specific Properties - IRB

Manage IRB properties specific to this campus.

Note: These properties can only be saved if the organization is marked as a SUNY Campus, which can be done on the "Campus Properties Common" view for this organization on the SponsoredPrograms store.

Enable Attestation?

Yes No [Clear](#)

Notify IRB Coordinator and Director on submission of IRB Study?

Yes No [Clear](#)

Notify IRB Coordinator and Director on Ancillary and Designated Review submission?

Yes No [Clear](#)

Enable COI/IRB Integration?

Yes No [Clear](#)

Enable Designated Reviewer Request Clarification activity?

Yes No [Clear](#)

Default IRB Office

Select the default IRB office that the studies will be assigned to on creation.

Buffalo State College Institutional Review Board

Available IRB Offices

Select the IRB offices that will be available as options when running the 'Assign IRB' activity.

Name

Buffalo State College Institutional Review Board

External IRB Offices

Select the External IRB offices that are available for selection on the "External IRB" Smartform page.

Name

Website URL

There are no items to display

IRB Library

Select the documents that are available when viewing the IRB Library.

Name	Category	Description	Document
Socially Sensitive Research	SOP	Buffalo State IRB	Socially Sensitive Research(0.01) <input type="text" value="..."/>
Assent to be in a Research Study (for children 7-13 years of age)	Template	Buffalo State IRB	Assent to be in a Research Study (for children 7-13 years of age)(0.02) <input type="text" value="..."/>
Written Documentation of Consent	SOP	Buffalo State IRB	Written Documentation of Consent(0.01) <input type="text" value="..."/>
Internet Research	SOP	Buffalo State IRB	Internet Research(0.01) <input type="text" value="..."/>

Ancillary Reviewers

Select the people who are available to be selected as Ancillary Reviewers in the "Manage Ancillary Reviews" activity.

Name

Organization

There are no items to display

Campus Specific IRB Appearance

IRB Campus Logo:

IRB Campus Logo is used on IRB specific system generated letters

[Choose File](#) [View](#)

IRB Campus Footer:

IRB Campus Footer is used on IRB specific system generated letters

[Choose File](#)

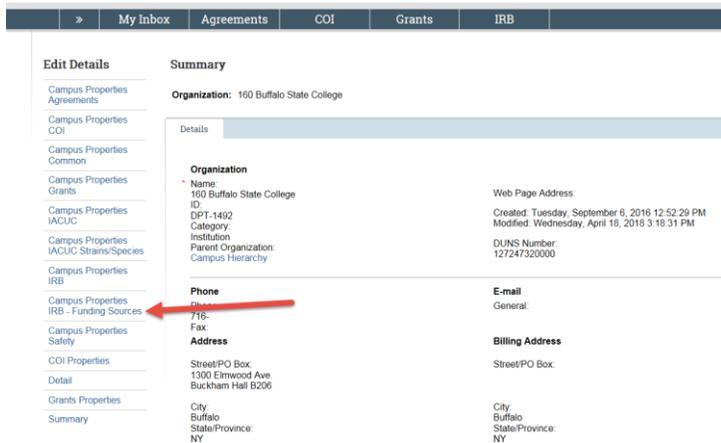
Send Email to IRB Coordinator when they are assigned via Assign Coordinator activity:

Yes No [Clear](#)

NOTE:

The following figure- Campus Properties IRB-Funding Sources-is NOT used by the RF. (See Section 4: Figure 4).

Section 4: Figure 4



5. Grants Module Maintenance

Purpose:

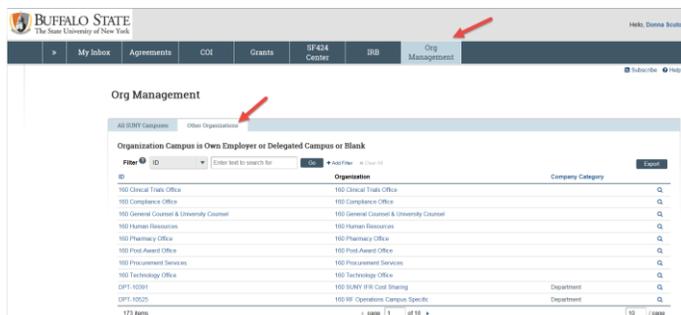
The below steps are used to maintain 12 settings within the Grants module for each campus. Note that only 7 of these settings will need to be updated as departments are added or personnel change.

A. Departmental Grants Properties

The below section describes how to maintain Campus level settings for Organizations (departments) and their use within the Grants module. These settings are needed for each department and were initially populated as part of the campus go-live.

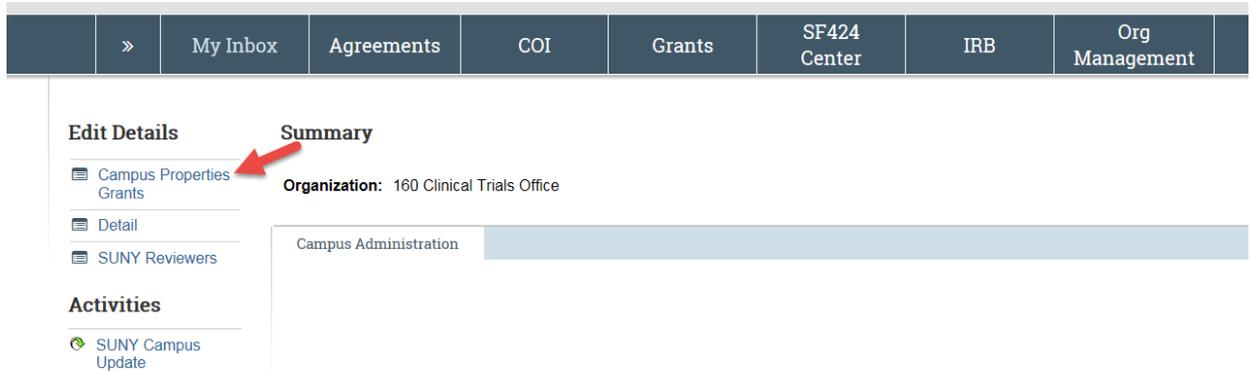
1. Select Org Management Tab. (See Section 2: A: Figure 1)
2. Click on the Other Organizations Tab to select a department. (See Section 5: A: Figure 1)

Section 5: A: Figure1



3. Select Campus Properties Grants on the left-hand side (See Section 5: A:Figure 2)

Section 5: A: Figure2



4. The Department Grant Properties form will display: Update the below fields related to the Grants Module. (See Section 5: A: Figure 3)

Field Name	Field Description
a. Human Assurance	This will be the campus human assurance number.
b. Animal Assurance	This will be the campus animal assurance number.
c. EIN Number	This will be the campus EIN number.
d. Is Foreign	Not used by the RF.
e. Is Active	Defaults to Yes.
f. Congressional District	Must be completed for the highest level Organization. Must be entered as NY-####.
g. Signing Official	Not used by the RF.
h. Grants Default Specialist	Select the Grants Default specialist for that department NOTE: the person must have a user role of Specialists Finance/Grant in order for that person to be available to select. Repeat these steps for every department. This step will need to be performed when a new organization (department) is added or a specialist has changed from a department.
i. Default Post Award Grants Specialist	Select the Default Post Award Grants Specialist for that department. NOTE: the person must have a user role of Specialists Finance/Grant in order for that person to be available to select. Repeat these steps for every department. This step will need to be performed when a new organization (department) is added or a specialist has changed from a department.
j. Sponsored Programs Office	This must be completed for all departments and is used on the SF424.
k. Applicant Institution	This is the highest level organization which is the campus. This must be completed for all departments and is used on the SF424.
l. Fringe Benefit Category	Not used by the RF.

Section 5: A: Figure 3

Department Grants Properties

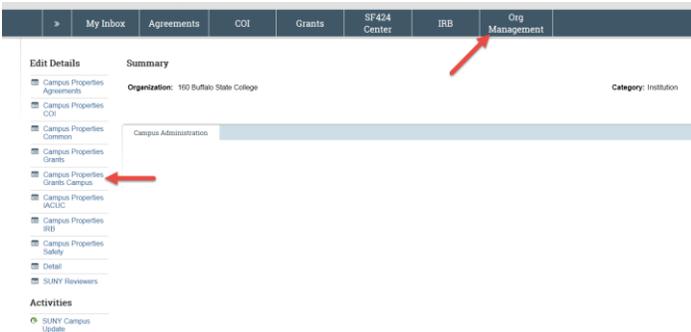
1. Human Assurance:
2. Animal Assurance:
3. EIN Number:
4. Is Foreign:
5. Is Active:
6. Congressional District:
7. Signing Official:
8. Grants Default Specialist:
Jessica Berg
9. Default Post Award Grants Specialist:
Jessica Berg
10. Sponsored Programs Office:
160 Sponsored Programs
11. Applicant Institution:
160 Buffalo State College
12. Fringe Benefit Category:

B. Campus Properties – Grants Campus Settings

The below section describes how to maintain 10 settings for Organizations and their use within the Grants module. These settings are for the highest level organization.

1. Select Org Management Tab. (See Section 5: B: Figure 1)
2. On the All SUNY Campuses Tab select the campus and then click on Campus Properties Grants Campus. (See Section 5: B: Figure 1)

Section 5: B: Figure 1



3. The Campus Properties – Grants Settings form will display: Update the below fields related to the Grants Module. (See Section 5: B: Figure 2)

Field Name	Field Description
a. Default Applicant Institution	Choose your campus from the list of values.
b. Default Sponsored Programs Office	Select from the department list of values.
c. Default Pre Award Specialist	Select from the list of values.
d. Default Post Award Specialist	Select from the list of values.
e. Additional Approval by Senior/Key Personnel	Yes – Grants is turned on to allow for other senior/key personnel (e.g. Co-Principal Investigator) to provide their approval before the department approvals. They will receive an email indicating they need to approve the proposal. No – Indicates this functionality is NOT turned on for the campus.
f. Enable COI/Grants Integration	Yes/No – Yes if you want research certifications created on the submission of the funding proposal to department or Individual review. (There are multiple paths for this integration)
g. COI/Grants Integration Path	Path 1 or Path 2 (related to the above) Path 1-creates the research certification upon submission of the funding proposal to department or Individual review. Path 2-creates an annual certification if one does not already exist, if an annual certification already exists a reminder is sent to the disclosure upon submission of the funding proposal to department or Individual review.
h. COI/Grants Integration – Path 1 Hard stop on send to sponsor	Yes/No if the research certification has not yet been determined by the COI Administrator the Funding Proposal cannot be submitted to the sponsor.
i. Performance Sites	Select your campus. This information is used to populate the campus name and address for the grants.gov submission.
j. Indirect Rate Schedule	Enter all your Indirect Rate Schedules per Cost type you would like to default to. As new rates are negotiated and new year’s need to be added, these will need to be updated. If a proposal goes past the years entered in the system, the system will use the latest rate entered via the start date. (See Section 5: B: Figure 3).
k. Grants Library	Specific grants documents that you would like to have available in the library. All campuses will have the ability to add new documents as needed.
l. Internal Submission Deadline	Number of days prior to the proposal being due.
m. Compliance Emails	The below email addresses are used when a user indicates Yes on the compliance questions on the proposal. The notification is sent when the proposal is submitted for Departmental review. <ul style="list-style-type: none"> • Human Subjects Email • Vertebrate Email

	<ul style="list-style-type: none"> • Recombinant Email • Hazardous Materials Email • Radioactive Materials Email • Radioisotopes Email • Human Embryonic Stem Cell Email • DURC Select Agents Email
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Section 5: B: Figure 2



Campus Properties - Grants Settings

Options

- Default Applicant Institution:**
160 Buffalo State College [***] [x]
- Default Sponsored Programs Office:**
160 Sponsored Programs [***] [x]
- Default Pre Award Specialist:**
Jessica Berg [***] [x]
- Default Post Award Specialist:**
Jessica Berg [***] [x]
- Additional Approval by Senior/Key Personnel:**
 Yes No [Clear](#)
- Enable COI/Grants Integration:**
 Yes No [Clear](#)
- COI/Grants Integration Path:**
[Dropdown menu]
- COI/Grants Integration - Path 1 Hard Stop on Send to Sponsor:**
 Yes No [Clear](#)

Performance Sites

 [***]

Name

160 Buffalo State College

Indirect Rate Schedule

F&A Default Rates

Cost Type	Activity Type	Fiscal Year	Campus On/Off Code	Start Date	Rate
[Update] MTDC	Research	2017	On	7/1/2012	0.47
[Update] MTDC	Research	2017	Off	7/1/2012	0.26
[Update] MTDC	Research DOD Contr.	2017	Off	7/1/2012	0.3
[Update] MTDC	Research DOD Contr.	2017	On	7/1/2012	0.51
[Update] MTDC	Other Sponsored Program	2017	On	7/1/2012	0.319
[Update] MTDC	Other Sponsored Program	2017	Off	7/1/2012	0.26
[Update] MTDC	Instruction	2017	On	7/1/2012	0.52
[Update] MTDC	Instruction	2017	Off	7/1/2012	0.26
[Update] MTDC	IPA	2017	On	7/1/2012	0.095

Grants Library

Grants Library Documents

Name
There are no items to display

Internal Submission Deadline (number of days before application submission deadline):

PACS Grants Campus Control – the Indirect Cost Rate Agreement Date and Cognizant Agency that will display on a system to system generated SF424.

Navigate as follows:

Org Management > Select your Campus Name to drill on > select Campus Properties – Grants

Scroll down to these questions:

9. Indirect Cost Rate Agreement Date and enter the date.

10. Cognizant Agency: enter the agency name

Then select the APPLY button on the top or bottom of the page.

Campus Properties - Grants Settings

Options

1. Default Applicant Institution:

010 University at Albany ... ×

2. Default Sponsored Programs Office:

010 Sponsored Programs Administration (5) ... ×

3. Default Pre Award Specialist:

Jessie Beauharnois ... ×

4. Default Post Award Specialist:

Jessie Beauharnois ... ×

5. Additional Approval by Senior/Key Personnel:

Yes No [Clear](#)

6. Enable COI/Grants Integration:

Yes No [Clear](#)

7. COI/Grants Integration Path:

8. COI/Grants Integration - Path 1 Hard Stop on Send to Sponsor:

Yes No [Clear](#)

9. Indirect Cost Rate Agreement Date:

10. Cognizant Agency:

Compliance Emails

Human Subjects Email:

Vertebrate Animals Email:

Recombinant DNA Email:

Hazardous Materials Email:

Radioactive Materials Email:

Radioisotopes Email:

Human Embryonic Stem Cells Email:

DURC Select Agents Email:

Add SUNY Indirect Rates - Internet Explorer

Add SUNY Indirect Rates

Cost Type:

Activity Type:

Fiscal Year:

Check for "On Campus", leave unchecked for "Off Campus":

Start Date:

Rate:

* Required

OK OK and Add Another Cancel

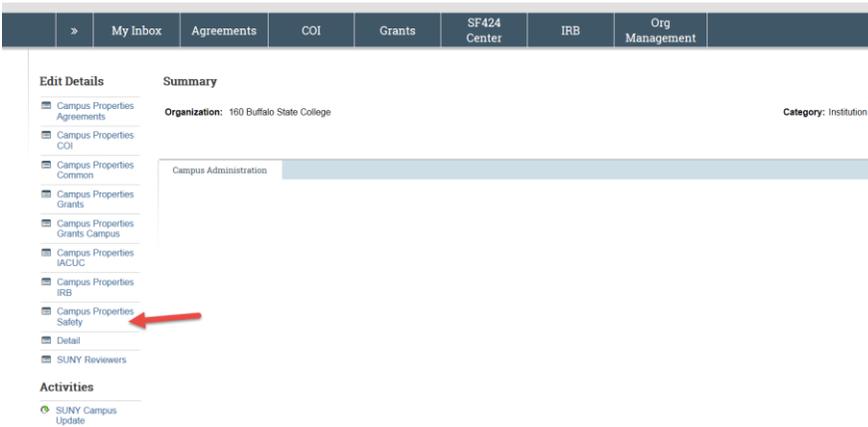
6. Safety Module Maintenance

Purpose:

The below section describes how to maintain 6 settings for use within the Safety module.

1. Select Org Management Tab. (See Section 2: A: Figure 1)
2. Click on the campus Name. (See Section 2: A: Figure 1)
3. Select Campus Properties Safety on the left-hand side and then select Click here to edit to go to the compliance store. Then select Campus Properties Safety to edit. (See Section 6: Figure 1))

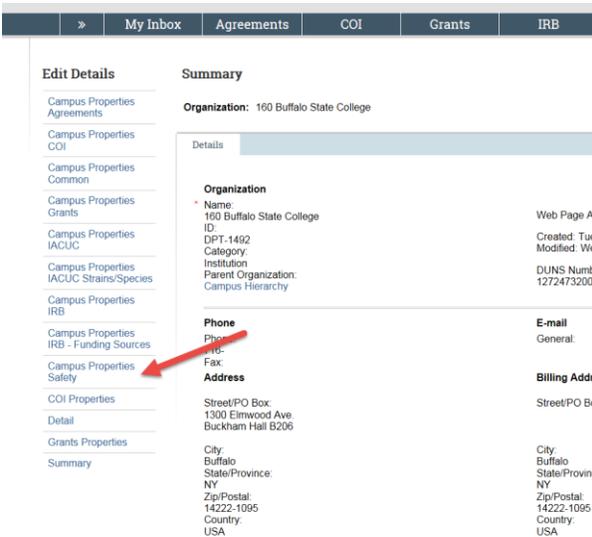
Section 6: Figure 1



Campus Specific Properties - Safety

This data is managed by the Compliance store.

[Click here to edit](#)



4. The Campus Specific Properties – Safety Settings form will display: Update the below fields related to the Safety Module: (See Section 6: Figure 2)

Field Name	Field Description
a. Available Safety Offices	Campus Specific Safety Offices. There are 4 types; Chemical Safety, Radiation Safety, Stem Cell Research Oversight and Institutional Biosafety Committee.
b. Safety Library	Documents that are available within the Safety module such as Policies and procedures. The document Library is shared with IRB and IACUC so the list will contain all documents and are not segregated by campus. Use caution

	<p>when selecting documents and review the document description. When we say NOT secure by campus this is only for the Campus Manager view and NOT for the PI's view of the documents.</p> <p>NOTE: If a specific library document is not in the LOV to select, contact customer services to load the Document.</p>
c. Ancillary Reviewers	Add or remove the people who are available to be selected as Ancillary Reviewers in the "Manage Ancillary Reviews" activity.
d. Safety Administrator Email Address	Allows the safety administrator to receive email notification that a safety protocol has been submitted. A contact has to be created for the Safety Administrator's and the email populated for this contact is the email address that the campus would like to use. Once the contact has been created it will be available in the LOV for this setting.
e. Safety Campus Logo	The image loaded here will appear in the header of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.
f. Safety Campus Footer	The image loaded here will appear in the footer of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.

Section 6: Figure 2

Campus Specific Properties - Safety

Manage Safety properties specific to this campus.

Note: These properties can only be saved if the organization is marked as a SUNY Campus, which can be done on the "Campus Properties Common" view for this organization on the SponsoredPrograms store.

Available Safety Offices

Select the four campus safety offices, one for each type of safety submission.

Name

There are no items to display

Safety Library

Select the documents that are available when viewing the Safety Library.

Name

Category

Description

Document

There are no items to display

Ancillary Reviewers

Select the people who are available to be selected as Ancillary Reviewers in the "Manage Ancillary Reviews" activity.

Name

Organization

There are no items to display

Safety Administrator Email Address

Campus Safety Administrator:

Campus Specific Safety Appearance

Safety Campus Logo:

Safety Campus Logo is used on Safety specific system generated letters

 Choose File View 

Safety Campus Footer:

Safety Campus Footer is used on Safety specific system generated letters

 Choose File

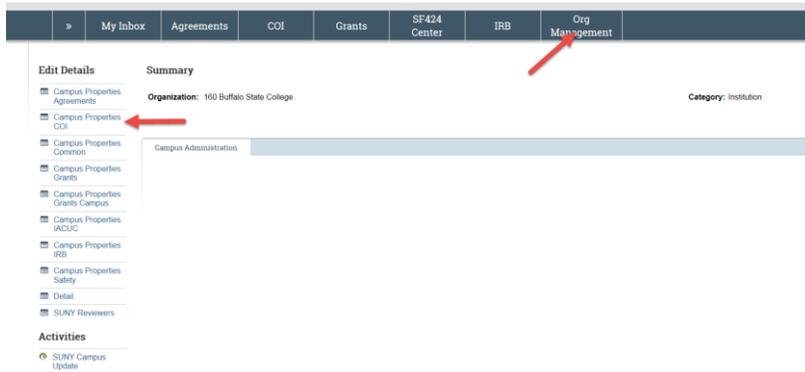
7. Conflict of Interest (COI) Module Maintenance

Purpose:

The below section describes how to maintain 12 settings for use within the COI module.

1. Select Org Management Tab. (See Section 7: Figure 1)
2. On the All SUNY Campuses Tab select the campus and then click on Campus Properties COI. (See Section 7: Figure 1)

Section 7: Figure 1



1. The Campus Properties COI form will display: Update the below Fields related to the COI Module: (See Section 7: Figure 2)

Field Name	Field Description
a. COI Default Committee	Name of the committee that defaults in the meetings function.
b. Is Training Integration (CITI) Required?	Determines if the campus uses CITI Integration.
c. COI What to disclose Text	Campus specific wording that the user will see when processing their annual disclosure in COI. https://html-online.com/editor/
d. COI Intellectual Property Rights Text	Campus specific wording that the user will see when in COI. https://html-online.com/editor/
e. COI Annual Disclosure Notification Text	Campus specific wording, and will appear in the email notification the user receives about annual notification on disclosure. https://html-online.com/editor/
f. COI Training Integration Text	Campus specific wording the user receives while processing their annual disclosure if their CITI training is not valid or up to date. User will not be able to continue until the issue is rectified. Only needed if the field "Is Training Integration (CITI) Required?" is Yes. https://html-online.com/editor/
g. COI Training and Education Text	Campus specific wording, this wording will appear on the training and education within COI. https://html-online.com/editor/
h. COI Ancillary Reviewers	Select individuals to use for "Ancillary Review".

i. COI Campus Logo	The image loaded here will appear in the header of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.
j. COI Campus Footer	The image loaded here will appear in the footer of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.
k. Annual Certification Name Text	Ability to put a date or information at the end of the disclosure for example 2018-19
l. 30-Day Rule	Yes/No if Yes the discloser has submitted a disclosure within 30 days any research disclosures will be created in administrative state.

Section 7: Figure 2

Campus Properties - COI

▪ **COI Default Committee:**

Buffalo State College COI Committee (160) ... +

▪ **Is Training Integration (CITI) Required?** Yes No [Clear](#)

▪ **COI What to Disclose Text:**

```
<p style="text-align: center;"><strong><u>Buffalo State's What to Disclose
Text</u></strong></p>
<p> </p>
<p>The following question relates to any outside entities with which you or an immediate family
member (defined as an individual's spouse or domestic partner or person in a civil union or
similar relationship, dependent children, or any other family members residing in the same
household) have relationships outside of this institution. Outside entities include companies,
service providers, non-governmental organizations (NGOs), foundations, competitors, non-
competitors, and any other for-profit or not-for-profit entities (hereinafter called "companies")
with which you or an immediate family member had a relationship in the previous 12 months, or
with which you or an immediate family member anticipate a relationship within this calendar
year.<br /> <br /> <strong>Payments or Remuneration</strong> - The following is a non-
exclusive list of payments that you must disclose if the value is $5,000 or more:</p>
<ul>
<li>Payments from all non-institutional sources, whether or not you received an IRS Form 1099,

```

▪ **COI Intellectual Property Rights Text:**

```
<p><strong>Includes </strong>income from royalty payments from the Research Foundation
for SUNY or the State University of New York and other forms of payment from successful
commercialization of intellectual property rights and interests (i.e., patents and copyrights)
licensed to any commercial entity. This includes payments made directly to you or an
immediate family member.</p>
```

▪ **COI Annual Disclosure Notification Text:**

<p>Annual Investigator Financial Disclosure due by November 1, 2017.</p>
 <p>The Research Foundation's Investigator Conflict of Interest (COI) Policy requires that all current or potential PIs and co-PIs, regardless of source of funding, submit an Annual Disclosure Certification of Financial Interests and Obligations. The policy defines an "Investigator" as any individual (including collaborators) participating in the design, conduct, or reporting of sponsored research. Investigators are required to make full disclosure of all existing significant obligations and financial interests.</p>
 <p>With the recent implementation of the Pre-Award and Compliance System (PACS), this disclosure must now be submitted electronically. You may log into the PACS system with the link provided to you in the email received from Donna Scuto several days ago. Investigators should file their disclosures as soon as possible and no later than November 1, 2017.</p>

▪ **COI Training Integration Text:**

<p>Your Conflict of Interest training from CITI Program is either expired or missing.</p>
 <p>CITI Conflict of Interest Training is required every four years. The date of your last completed training is below. If that date is more than four years old you need to take the CITI Program course "Conflict of Interest (COI) Refresher Course" before you can complete your Conflict of Interest Disclosure. Please login to your CITI Program Account and complete the course.</p>

 If you believe your training is up to date, you may need to update your affiliation to SUNY-Buffalo State.
 If you haven't yet completed the CITI Program course "Conflict of Interest", please do so as soon as possible.

▪ **COI Training and Education Text:**

<p>Buffalo State requires you to complete a few simple steps in order to be compliant with its policy and federal regulations. The following steps may be completed through the SUNY/RF PACS - Conflict of Interest module.</p>

 Disclose any Financial Interests of you and your immediate family member within 30 days of acquiring or discovering the interest, by completing the financial disclosure form.
 Provide all necessary disclosure information annually. Annual disclosures will be due at the time statements are made within 30 days of the end of the calendar year.

▪ **COI Ancillary Reviewers:**

...

Name	Organization
------	--------------

▪ **COI Campus Logo:**

Used on specific COI related system generated documents

Choose File View

▪ **COI Campus Footer:**

Used on specific COI related system generated documents

Choose File View

▪ **Annual Certification Name Text:**

▪ **30-Day Rule:**

Yes No Clear

8. Institutional Animal Care and Use Committee (IACUC) Module Maintenance

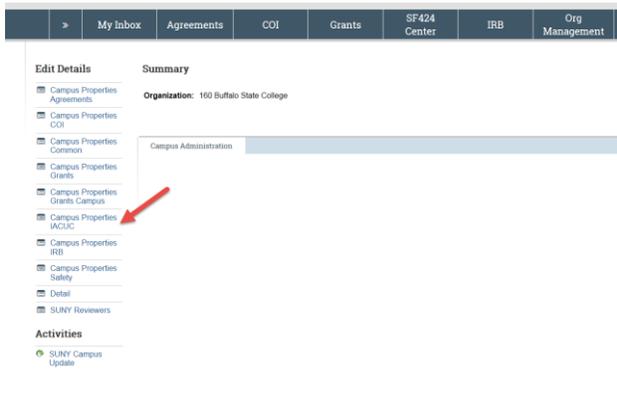
Purpose:

The below section describes how to maintain 6 settings for use within the IACUC module.

A. Campus Specific Properties-IACUC

1. Select Org Management Tab. (See Section 2: A: Figure 1)
2. Click on the campus Name. (See Section 2: A: Figure 1)
3. Select Campus Properties IACUC on the left-hand side and then select Click here to edit to go to the compliance store. Then select Campus Properties IACUC to edit. (See Section 8:A: Figure 1)

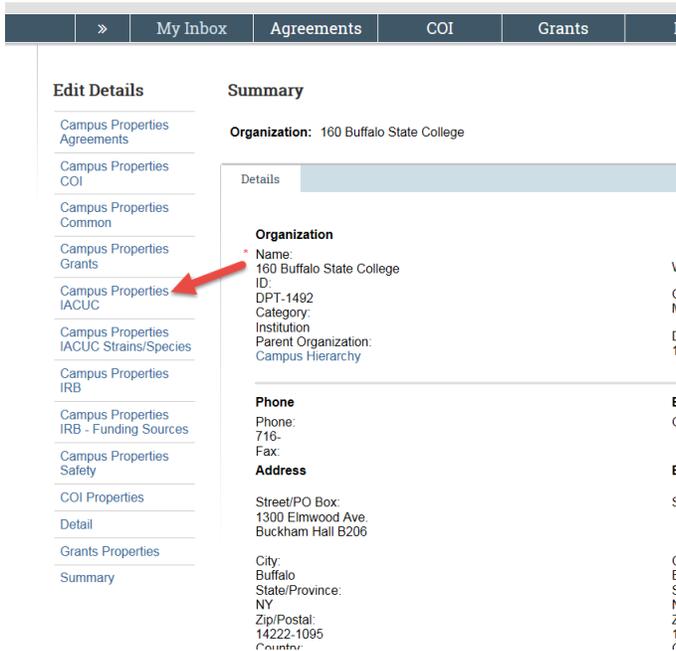
Section 8: A: Figure 1



Campus Specific Properties - IACUC

This data is managed by the Compliance store.

[Click here to edit](#)



4. The Campus Properties IACUCI form will display: Update the below Fields related to the IACUC Module: (See Section 8: A: Figure 2)

Field Name	Field Description
a. Default IACUC Office	Name of the default office that was setup for each campus, there is only one per campus.
b. Available IACUC Offices	Not used by RF.
c. IACUC Library	Documents Used within the IACUC module such as Policies and procedures. NOTE: The document Library is shared with IRB and Safety so the list will

	contain all documents and are not segregated by campus, please be careful when selecting documents and review the document description. When we say NOT secure by campus this is only for the Campus Manager view and NOT for the PI's view of the documents.
d. Ancillary Reviewers	Load individual users that will be assigned for ancillary reviews.
e. IACUC Campus Logo	The image loaded here will appear in the header of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.
f. IACUC Campus Footer	The image loaded here will appear in the footer of letters, agendas and minutes. The file must be in the form of a picture, ie .jpg, Best practice is for the logo to have a clear transparent background for cosmetic purposes. The size should be between 200 and 300 pixels horizontally.

Section 8: A: Figure 2

Campus Specific Properties - IACUC

Manage IACUC properties specific to this campus.

Note: These properties can only be saved if the organization is marked as a SUNY Campus, which can be done on the "Campus Properties Common" view for this organization on the SponsoredPrograms store.

Default IACUC Office

* Select the default IACUC office that the studies will be assigned to on creation:

Available IACUC Offices

Select the IACUC offices that will be available as options when running the 'Assign IACUC' activity.

Name

There are no items to display

IACUC Library

Select the documents that are available when viewing the IACUC Library:

Name	Category	Description	Document
------	----------	-------------	----------

There are no items to display

Ancillary Reviewers

Select the people who are available to be selected as Ancillary Reviewers in the "Manage Ancillary Reviews" activity:

Name

Organization

There are no items to display

Campus Specific IACUC Appearance

IACUC Campus Logo:

IACUC Campus Logo is used on IACUC specific system generated letters

Choose File

IACUC Campus Footer:

IACUC Campus Footer is used on IACUC specific system generated letters

Choose File

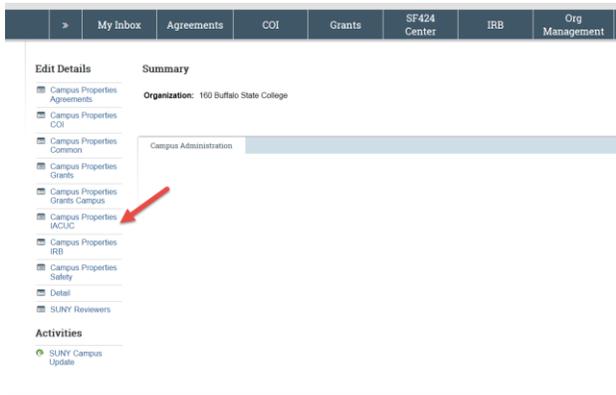
B. Campus Properties IACUC-Strains

Purpose:

The below section describes how to select a campus specific list of strains from a SUNY PACS master list.

1. Select Org Management Tab. (See Section 2: A: Figure 1)
2. Click on the campus Name. (See Section 2: A: Figure 1)
3. Select Campus Properties IACUC on the left-hand side and then select Click here to edit to go to the compliance store. Then select Campus Properties IACUC strains/species to edit. (See Section 8: B:Figure 1)

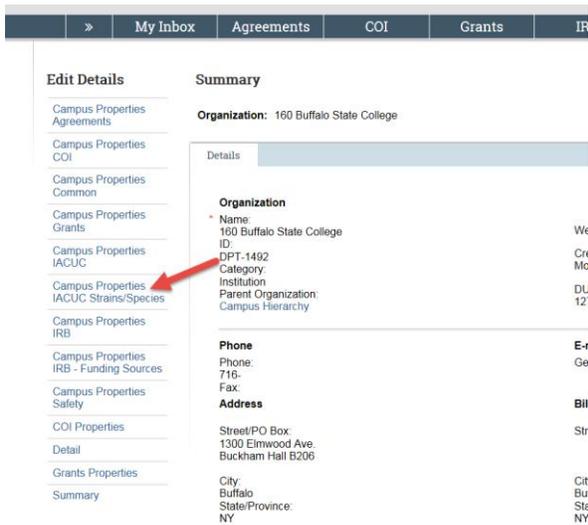
Section 8: B: Figure 1



Campus Specific Properties - IACUC

This data is managed by the Compliance store.

[Click here to edit](#)



- To add campus specific strains, click on Add, then use the Select for the species, then click to FIND and the available strains will appear. Once the Strain is selected click OK. (See Section 8: B: Figure 2)

Section 8: B: Figure 2

Campus Properties IACUC - Strains

Campus IACUC Strains:

Species	Strain
There are no items to display	

Campus IACUC Species:

Common Name	Scientific Name
There are no items to display	

Select ClickStrain - Internet Explorer

Select ClickStrain

ID

Species

Strain

Select ClickStrain - Internet Explorer

Select ClickStrain

ID

Species

Strain

1-6 of 6

Species	Strain
<input type="checkbox"/> Mouse	NOD.CB17
<input type="checkbox"/> Mouse	C57BL/6
<input type="checkbox"/> Mouse	CBySmn.CB17
<input type="checkbox"/> Mouse	J.NU
<input type="checkbox"/> Mouse	129S1/SvImJ
<input type="checkbox"/> Mouse	B6SJLF1/J

1-6 of 6

5. To add campus specific species, click on Add, then Select the species, click OK. (See Section 8: B: Figure 3)

Section 8: B: Figure 2

