The WBSE Create Form is the tool used to request new WBSE(s) for any externally sponsored project via the SPS record and generate the WBSE(s) in SAP. The department/center/institute will now have the ability to generate WBSE(s) as needed.

**Key Points when requesting a WBSE**

**Using the tool:**
- Pop ups must be allowed for SPS on your browser to support the integration between SPS and SAP
- This form should be used to request the creation of WBSE(s) for externally sponsored projects only
- Do NOT use this form for Cost Centers, WBSE(s) for Gifts, Capital Projects, or other projects not entered into SPS

**Requesting a code:**
- For projects with annual renewals, the Grant Manager will receive a notification approximately 45 days prior to budget period end to create the WBSE(s) needed for the upcoming budget period
- Additional codes cannot be requested while a create form is in process, or if the SPS record status is “Award-Inactive,” “Inactive,” “Unfunded,” or “Withdrawn”
- If the user does not have access to the SPS record, they must work with the owner of the SPS record to facilitate the creation of the WBSE(s). This could be common with internal subcode creation.

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- SAP: Project Level section
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- Appendix: Activity Type Table
- SAP: WBSE Specific Values Level section
- Submission:

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- SAP: Toolbar and Request section
- SAP: Project Level section
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- Appendix: Activity Type Table
- SAP: WBSE Specific Values Level section
- Submission:

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WBSE Create Form

Creating WBSE in Advance of Award (SPS)

Initiate the WBSE request in SPS using the SPS Proposal module. The proposal information should be as complete as possible to ensure the correct type of WBSE is created.

**Department/Center/Institute initiates when:**
- WBSEs in advance of award
- WBSEs with annual renewals if codes in advance are required (highly encouraged)
- Subcodes for existing WBSEs

**Central Office initiates when:**
- WBSEs at Award In Progress/Award
- WBSE for annual renewals if no code in advance requested

1. In SPS, select Proposals
2. Enter search criteria for desired proposal (Tip: Use the SPS# in the field Prop#) and click the Search icon
3. Click the Go to icon to the left of the result and select Main

4. The SPS record will open in a new window/tab. Confirm the required sections and fields are complete/accurate in proposal

**Budget Period & Project Period Dates**

- **Project Period**
  - Start Date: 04/01/2019
  - End Date: 03/31/2024
  - Proposed Duration: 60 months

- **Current Budget Period**
  - Start Date: 04/01/2015
  - End Date: 03/31/2020
  - Proposed Duration: 12 months

**External Subrecipient Details**

**Consortium/Subaward Costs**

<table>
<thead>
<tr>
<th>Period</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>04/01/2019</td>
<td>03/31/2020</td>
</tr>
<tr>
<td>2</td>
<td>04/01/2020</td>
<td>03/31/2021</td>
</tr>
<tr>
<td>3</td>
<td>04/01/2021</td>
<td>03/31/2022</td>
</tr>
<tr>
<td>4</td>
<td>04/01/2022</td>
<td>03/31/2023</td>
</tr>
<tr>
<td>5</td>
<td>04/01/2023</td>
<td>03/31/2024</td>
</tr>
</tbody>
</table>

**Activity Type**

- Main
- Sponsor
- Admin
- Activity
- Cli

**Attention!**

Before creating WBSE(s) in advance of the award, be sure that the SPS record is as complete as possible. Incomplete/completed fields and sections will impact if the WBSE(s) is set up correctly.

5. Initiate the WBSE request. Click Proposal Actions and select Manage WBSE Requests
6. Click Create WBSE Request
## WBSE Create Form
### Creating WBSE in Advance of Award (SPS)

#### 7 Address warnings and errors as prompted
For example, if the use of Human Subjects is indicated in SPS, the clinical trials questions must be answered. If not, you will be prompted with an error message that the clinical trial questions must be addressed in the Protocol Notebook.

#### 8 Review Request Information and Compliance Information sections and take any action needed

- **Request Information**
  - **Type:** Code in Advance
  - **Request Initiated On:** 11/30/2018 at 01:41 pm by Darrell Queen (STAGE) (queen2)
  - **Status:** In Progress
  - **SAP TK ID:**

  The Red Flag indicates non-compliance. This will not stop the creation of a WBSE, but it will need to be addressed prior to the award processing.

- **Compliance Information**
  - **COI Disclosures:** Non-Compliant
  - **RCC Training:** Non-Compliant

#### 9 Complete the fields below and then click Create

- **A. Description:** The Project Long Text will be pulled from the Short Title listed in SPS record and should only be updated if the project title has changed since the SPS record was created.
- **B. Parent:** (If no Parent code exists) A single parent code will be created by default; this field is not editable.
- **C. External Subcodes:** The number of external subcode WBSE(s) (sum total) to be created; this will default based on the external subcontracting organizations found in the SPS proposal record (See F for more details).
- **D. Internal Subcodes:** The number of internal subcode WBSE(s) to be created (sum total); this will default to 0. Insert the number of internal subcodes that needs to be created. The (i) button will display a list of the PI(s) identified on the proposal.
- **E. DCRI Sister:** For use by DCRI GMs only, leave defaulted to 0.
- **F. Subcontractors:** Number of external subcode WBSE(s) to be created for external subrecipients; this will default based on the external subcontractors found in the SPS proposal record. Multiple WBSE(s) can be created for an external subrecipient, if applicable. As these numbers change, the total listed in C will auto-adjust.

#### 10 Once Create has been clicked, additional buttons will be available for specific form actions

- **Choose Save to generate a draft of the request. This will be accessible via the SPS record.**
- **Choose Send Request to SAP to send the form data to SAP for review and approval; this will continue WBSE creation in Duke@Work.**
- **Choose Cancel to undo all unsaved changes; this will NOT cancel the request unless the form was not previously saved.**
Creating WBSE in Advance of Award (SAP)

Once the request has been submitted in SPS, it will progress to SAP via Duke@WORK (if it doesn’t open automatically, you can retrieve from your Universal Worklist). Project and WBSE values can be assigned in this section prior to being routed for approval by the preaward offices and TBS.

Request Section
This section contains information that is related to the submission and approval of the form. The layout is similar to the header section found in other research forms like the closeout tasklist.
WBSE Create Form

Project Level Values Section

The values entered in this section will impact ALL WBSE(s) being created via this form. If an entry in this section is not completed correctly, a new WBSE(s) form may need to be submitted and any incorrectly set up codes will need to be closed. In the event that a new WBSE is required, any activity or effort on the incorrectly set up codes will need to be moved prior to the code closing.

Field Key

Form info is often derived from the SPS record. The appearance of the field will determine if it is editable and/or if it is required.

A. Grey Field: non editable field, requires review only
B. White Field (with asterisk): editable field, requires entry
C. White Field: editable field, entry encouraged
D. Grey Text and Field: automatically populated field, not editable

General

1. Sponsor Selection: If not automatically populated, select the sponsor from the dropdown list, (for NIH, these are the institutes). Inaccurate selection will result in the wrong applicant # being assigned to the WBSE(s)

2. Financial Reporting Required: If the field is blank/editable, indicate if financial reporting is required, or if there are any restrictions on how funds are expended (dependent upon sponsor; will default to Y for Federal Prime awards)

Preaward Office: Defaults to ORA, ORC or ORS, editable if needed

CFDA Number: Indicate CFDA number, for Federal Prime sponsored awards

Programmatic Class: Prepopulated, if possible. If not, department must choose from drop down. Completed by initiator or dept. approver See Chart on Page 13

Note: the sponsor type/source, financial reporting required, and purpose drive the first 3 digits of the WBSE. If corrections or edits are needed; return form to SPS, revise SPS record details, then resubmit the WBSE form for review and approval

3. Federal Prime Sponsor & Federal Prime Grant Number: Enter from dropdown if known, otherwise TBS will complete at time of award

Dates

Dates in this area will be derived from the SPS record. Changes made in this area will NOT BE TRANSMITTED TO THE SPS RECORD

Project Start/End: Update the overall start and end date for the project

Budget Start/End: Update the budget period start and end date; this field populates the dates in the projection tool; If edits are made to these dates, the same changes should be made in the budget period grouping below

Open/CLOSE Budget Periods to Edit: Click the Open/CLOSE Budget Periods for Edit icon to update the start and end dates for each individual budget period; this field populates the dates used in the projection tool

Assignment Template

For each field that a Duke Unique ID is listed, the individual will be assigned to that role for ALL WBSE(s) being created with this form.

(re)Derive Names: Displays the Name beside each field where the DUKE Unique ID has been entered

Validate assignments: This confirms that the Duke Unique ID entered is valid (it does not validate the role of the person entered)

Copy Assignments to WBSEs: Copies the entered assignment values to all the WBSE(s) in the WBSE Specific Values section at the bottom of the form.
WBSE Create Form

WBSE Specific Values Section

This section allows for the editing of values for specific WBSE(s). The fields in this section are derived from the SPS proposal and from the values selected in the Project Level Values above. Setting these assignments during the WBSE creation process ensures that workflow approvers and FAM controls are in place from the start, and that the GM1 will be included in notification once the code is created.

General

1. The WBSE to be created will be listed out in sequential order with the project name being derived from SPS

<table>
<thead>
<tr>
<th>General</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SPS No.</td>
<td>SPS Seq.</td>
</tr>
<tr>
<td>245524</td>
<td>001</td>
</tr>
<tr>
<td>245524</td>
<td>002</td>
</tr>
<tr>
<td>245524</td>
<td>003</td>
</tr>
</tbody>
</table>

Take note of the sequence number and which WBSE it pertains to before proceeding. This sequence number will be referenced in the assignments section below.

Project Name: This field is not editable and is derived from standard naming conventions
Parent: The Parent WBSE will only be populated when a Parent WBSE already exists for the proposal/award
Project Long Text: This will default based on SPS, it populates the Fund Code Long Text to be shown in CJ03
Dept. Project Name: Entry will populate the field Department Project Name in CJ03
Subrecipient: Choose the correct subrecipient applicant number from the dropdown. This will derive from SPS unless more than one applicant number exists for the subrecipient
Rebud Class: This defaults to the appropriate Re-budget Class for Parent (I) and External Sub (R). Department should not edit
CRU: Select the appropriate Clinical Research Unit from the dropdown, if applicable
Sister Code: This field only applies to DCRI

Assignments/Indirects

1. The assignments section will be populated based on the SPS record and the Assignment Table from the Project Level Values (see page 5). Verify and update the fields, as needed (see Navigating Master Data QRG for more information on these fields)

Assignments

<table>
<thead>
<tr>
<th>Assignments</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Investigator(s) / Grant Administrators</td>
<td></td>
</tr>
<tr>
<td>SPS Seq.</td>
<td>SPS No</td>
</tr>
<tr>
<td>001</td>
<td>245524</td>
</tr>
<tr>
<td>002</td>
<td>245524</td>
</tr>
<tr>
<td>003</td>
<td>245524</td>
</tr>
</tbody>
</table>

Check Request / SRM

<table>
<thead>
<tr>
<th>Check Request / SRM</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SPS Seq.</td>
<td>SPS No</td>
</tr>
<tr>
<td>001</td>
<td>245524</td>
</tr>
<tr>
<td>002</td>
<td>245524</td>
</tr>
<tr>
<td>003</td>
<td>245524</td>
</tr>
</tbody>
</table>

Travel / Payroll

<table>
<thead>
<tr>
<th>Travel / Payroll</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SPS Seq.</td>
<td>SPS No</td>
</tr>
<tr>
<td>001</td>
<td>245524</td>
</tr>
<tr>
<td>002</td>
<td>245524</td>
</tr>
<tr>
<td>003</td>
<td>245524</td>
</tr>
</tbody>
</table>

Indirects

<table>
<thead>
<tr>
<th>Indirects</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SPS No.</td>
<td>SPS Seq.</td>
</tr>
<tr>
<td>245524</td>
<td>001</td>
</tr>
<tr>
<td>245524</td>
<td>002</td>
</tr>
<tr>
<td>245524</td>
<td>003</td>
</tr>
</tbody>
</table>
Form Submission

1. Scroll to the top of the form and click **Check/Validation**. Any warning and error messages that need to be reviewed/resolved will populate at the top of screen.

   - **Project Setup**
     - Created by: 11/03/2018 QUEEN DJ 15:05:30 41006241
     - ![Check/Validation](Image)
     - ![Add Approver](Image)
     - ![Save as Draft](Image)
     - ![Submit to Workflow](Image)
     - ![Cancel the Project Setup Request](Image)
     - ![Close Application](Image)

   - **Error:** Item that must be resolved before submission can continue (i.e. missing but required entry, or conflicting entries)
   - **Warning:** Item that requires attention, but does not need to be resolved in order for submission to continue

   ![Error](Image)

   ![Warning](Image)

Optional: Click **Add Approver** prior to submitting the form into workflow to add additional approvers beyond those in the standard workflow.

- **Project Setup**
  - Created by: 11/03/2018 QUEEN DJ 15:05:30 41006241
  - ![Check/Validation](Image)
  - ![Add Approver](Image)
  - ![Save as Draft](Image)
  - ![Submit to Workflow](Image)
  - ![Cancel the Project Setup Request](Image)
  - ![Close Application](Image)

   - **Add Approver**
     - ![User](Image)
     - ![Ok](Image)
     - ![Cancel](Image)

1. Click **Add Approver**
2. Enter the Unique ID of the additional approver/reviewer in the **User** field of the **Add Approver** window, then click **Ok**
3. The additional approver will be visible on the WBSE form, below the action bar in the header section

Optional: Click **Submit to Workflow** to route the WBSE form to departmental approvers or additional approvers if utilized.

- **Project Setup**
  - Created by: 11/03/2018 QUEEN DJ 15:05:30 41006241
  - ![Check/Validation](Image)
  - ![Add Approver](Image)
  - ![Save as Draft](Image)
  - ![Submit to Workflow](Image)
  - ![Cancel the Project Setup Request](Image)
  - ![Close Application](Image)

Canceling the Form

Optional: To cancel the form and delete the WBSE set up request, click **Cancel the Project Setup Request**
Creating additional WBSE(s) - Awarded State (SPS)

Initiate the WBSE request via the SPS Award module using the parent record (this can also be done through the Proposal module). Previous WBSE requests must be fully approved before a new request can be initiated.

1. In SPS, select Awards

2. Enter search criteria for desired proposal (Tip: Use the SPS# in the field Prop# and then hit enter.)

3. Click on the Go to icon and select View

4. From the Award record, click Actions and select Manage WBSE Requests, then Create WBSE Request

5. If Human Subjects is indicated in SPS, the clinical trial questions must be addressed in the Protocol Notebook

6. A new screen will open; complete the fields below and then click Create

<table>
<thead>
<tr>
<th>Line #</th>
<th>Proposal ID</th>
<th>Description</th>
<th>Parent</th>
<th>External Subcodes</th>
<th>Internal Subcodes</th>
<th>DCRI S</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>23030</td>
<td>Health Professionals Education Partnership Initia</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

   - **A. Description**: The Project Long Text will be pulled from the Short Title listed in SPS; this field should only be updated if the project title has changed since the SPS record was created.
   - **B. Parent**: The Parent code already exists, therefore this field will default to 0 and will not be editable.
   - **C. External Subcodes**: The number of external subcode WBSE(s) (sum total) to be created; this field will default to zero and be greyed out. Click the “+” icon to add subcontractors and increase the number of codes in the subcontractor section (F).
   - **D. Internal Subcodes**: The number of internal subcode WBSE(s) (sum total) to be created; this field will default to 0.
   - **E. DCRI S**: FOR USE BY DCRI GMs ONLY, LEAVE DEFAULTED TO 0
   - **F. Subcontractors**: The number of external subcode WBSE(s) (sum total) to be created, by external subrecipient. Multiple WBSE(s) can be created for a subcontractor, if applicable. As these numbers change, the total listed in C will auto-adjust.

7. Once the Create button has been clicked, additional buttons will be available for specific form actions

   - Choose Save to generate a draft of the request. This will be accessible via the SPS record
   - Choose Cancel to undo all unsaved changes, this will NOT cancel the request unless the form was not previously saved
   - Choose Send Request to SAP to submit the form data for review and approval; this will continue the WBSE creation in Duke@Work.

Once the request has been sent to SAP, the steps are identical to those for creating a WBSE in advance of award. Please return to page 4 for the remaining instructions.
WBSE Create Form Display

Once the form has been saved in SAP, it can be displayed using the WBSE Create Form Display. The utility will only display the form, and not allow for editing.

1. Select the Sponsored Research Forms, Workflow and Image Retrieval folder from the Grants Management tab

2. Select the WBSE Create Form Display folder from the Grants Management tab

3. Enter one of the following search criteria below. The search can be performed by single value, ranges, or non-consecutive multiple values

   **Project Setup Utility**

   A. TK: Returns forms by the internal 8 digit record number (begins with 41)
   B. Overall SPS: Returns forms by the 6 digit SPS record number of the parent WBSE
   C. Project: Returns forms by the 7 digit SAP WBSE number (begins with 3, 2, or A)
   D. Applicant Number: Returns forms by the 8 digit Applicant Number that corresponds to the Sponsor (begins with 03)

4. Click Search

5. Click the grey box to the left of the desired entry

6. Click the Display icon
WBSE Create Form

Management Form Overview

Like other research related forms, the WBSE Create Forms submitted by a particular user are listed in the Management Form Overview. If the form is still open for approvals, opening it from this utility will return the full list of workflow approvals/approving agents associated with the form. If the form is fully approved and completed, the form itself will open.

1. Select the Sponsored Research Forms, Workflow and Image Retrieval folder from the Grants Management tab

2. Select the Management Form Overview folder from the Grants Management tab

3. Once the report opens, un-check All Available Forms

4. Check WBSE Create Form

5. Click Refresh

6. Select the Open/For Approval link under Status and view the WF approvals
WBSE Create Form

Edit/Approve/Return via Universal Worklist

Once the form is saved in SAP, it can only be recalled for editing, submission, approval, or deletion of the form via the Universal Worklist.

1. Navigate to work.duke.edu and select Universal Worklist

2. Double-click on the text of the desired entry

3. Once the form is open for review/approval, only the following fields will be available for editing:
   - Programmatic Class
   - BFR
   - PI
   - PI#2
   - All other assignment fields (GM1/2, Travel 1/2, etc)
   - Programmatic Class
   - Project Long Text
   - Dept Project Name
   - CRU
   - SUBRECIPENT #
   - CRU
   - Programmatic Class

   See Page 4 for further details on identifying editable vs non-editable fields

For Departmental Approvers:

1. After following steps 1-3 above, choose Check/Validation and address any Warning or Error messages that may occur.

2. Choose Approve to advance the form to the next step in the workflow: see page 12

To return a form to the submitter for corrections, choose Return to Submitter. The approver must enter Comments in order to return the form.
The WBSE Create Form is approved at the department level by the same approving agents that are on the Rebud/CAS workflow. The form will route based on the BFR of the parent code. The three possible workflow scenarios are detailed below.

### Workflow Scenarios

**Creating WBSE(s) in Advance of Award (By Department/Center/Institute)**

<table>
<thead>
<tr>
<th>Department/Center/Institute Initiates</th>
<th>Dept/CAS Approver</th>
<th>Pre-Award Office*</th>
<th>Treasury Billing Services (TBS)</th>
<th>WBSE(s) Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Creating Additional WBSE(s) (By Department/Center/Institute)**

<table>
<thead>
<tr>
<th>Department/Center/Institute Initiates</th>
<th>Dept/CAS Approver</th>
<th>Pre-Award Office*</th>
<th>Treasury Billing Services (TBS)</th>
<th>WBSE(s) Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**WBSE Created at time of Award (By Pre Award Office)**

<table>
<thead>
<tr>
<th>Pre-Award Office*</th>
<th>Dept/CAS Approver</th>
<th>Treasury Billing Services</th>
<th>WBSE(s) Created</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Ad Hoc</td>
<td></td>
</tr>
</tbody>
</table>

* The Pre-Award Office that your form will route to is based on the Pre-Award Attribute listed in Project Level Value Selection, see page 5.

Once the form has been reviewed and approved, a notification will be sent to the Department Administrator, PI and Grant Manager 1 (if assigned during completion of the WBSE Create Form).
Appendix – Programmatic Attributes

The programmatic attribute describes the function of the code. This attribute must be selected prior to the department approval of the WBSE create form.

<table>
<thead>
<tr>
<th>Prgm Attr</th>
<th>Description</th>
<th>SOM/SON</th>
<th>Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>CME</td>
<td>CONTINUING MEDICAL EDUCATION</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>GME</td>
<td>GRADUATE MEDICAL EDUCATION</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SCE</td>
<td>SPONSORED RESEARCH-IRB EXEMPT</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SCI</td>
<td>SPONSORED RESEARCH-REQUIRES IRB REVIEW</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SDC</td>
<td>DESIGNATED AS COORDINATING CENTER</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SNC</td>
<td>SPON RESEARCH NON-CLINICAL</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SOO</td>
<td>SPONSORED-OTHER/SPECIAL PROGRAMS/TRAINING</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>UME</td>
<td>UNDERGRADUATE MEDICAL EDUCATION</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SRF</td>
<td>SPONSORED RESEARCH - FEDERAL</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SRS</td>
<td>SPONSORED RESEARCH - STATE</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SRN</td>
<td>SPONSORED RESEARCH – NON GOVERNMENT</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Appendix – Activity Type in SPS

The activity type selected in SPS will drive the 3rd digit of the WBSE element created. For additional details on the account code structure and the logic of the number assigned, visit: [https://finance.duke.edu/accounting/glaccts/overview#3](https://finance.duke.edu/accounting/glaccts/overview#3)

<table>
<thead>
<tr>
<th>Activity Types in SPS</th>
<th>SAP Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>XX3</td>
</tr>
<tr>
<td>Fellowship (individual trainee on one grant)</td>
<td>XX8</td>
</tr>
<tr>
<td>Institutional Training Program (usually multiple trainees on one grant)</td>
<td>XX2 (i.e., T32 or K12)</td>
</tr>
<tr>
<td>Clinical Trial</td>
<td>XX3</td>
</tr>
<tr>
<td>Public Service</td>
<td>XX9</td>
</tr>
<tr>
<td>Institutional Support</td>
<td>XX1</td>
</tr>
<tr>
<td>Construction/Renovation</td>
<td>XX7</td>
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<tr>
<td>Equipment</td>
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<td>Conference</td>
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<th>Specific Awards</th>
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<tr>
<td>NIH K Awards (except K12)</td>
<td>Research</td>
<td>Training (XX2)</td>
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<td>K12 Awards</td>
<td>Institutional Training Program</td>
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<td>NIH R25, T Awards</td>
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<td>NSF Research Experience for Undergrads</td>
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<td>NSF REU Supplements</td>
<td>*Consult your pre-award office for Activity Type</td>
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<td>Institutional Training Program</td>
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<td>Instit. Training Program or Fellowship</td>
<td>Training (XX2)</td>
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<td>NIH N, P, U Awards</td>
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<td>Research (XX3)</td>
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<td>NIH U awards</td>
<td>Research</td>
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<td>NSF Career Development Awards</td>
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<tr>
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<td>Institutional Support</td>
<td>Instruction/Dept. Research (XX1)</td>
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<td>NIH C Awards</td>
<td>Construction/Renovation or Equipment</td>
<td>General Operation (XX7)</td>
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<td>NIH F Awards</td>
<td>Fellowship</td>
<td>Student Aid (XX8)</td>
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Exceptions to the above may apply, work with your pre-award office if in doubt.
Appendix – Additional Guidance

For guidance beyond this document, please view the videos below or reach out to the applicable pre-award office below.

Videos for Initiating/Creating a WBSE Create Form

- WBSE Create Form – Creating WBSEs Using the Create Tool
  - [https://lms.duhs.duke.edu/Saba/Web/Cloud/goto/OfferingDetails?offeringId=dowbt000000000038372](https://lms.duhs.duke.edu/Saba/Web/Cloud/goto/OfferingDetails?offeringId=dowbt000000000038372)

Videos for Approving a WBSE Create Form

- WBSE Create Form – Approving WBSE Create Forms
  - [https://lms.duhs.duke.edu/Saba/Web/Cloud/goto/OfferingDetails?offeringId=dowbt000000000038373](https://lms.duhs.duke.edu/Saba/Web/Cloud/goto/OfferingDetails?offeringId=dowbt000000000038373)

Contact Information

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<tr>
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<td>Office of Research Support (ORS)</td>
<td><a href="mailto:ORS-Grant@duke.edu">ORS-Grant@duke.edu</a></td>
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<td>Contracts</td>
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<td><a href="mailto:contractsb.management@mc.duke.edu">contractsb.management@mc.duke.edu</a> <a href="mailto:ORC_Industry_Contracts@mc.duke.edu">ORC_Industry_Contracts@mc.duke.edu</a></td>
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