

Sponsored Programs Administration Buzz Session

June 25, 2025

12:10 PM – 1:00 PM



Agenda

Ticker Review and Demo of Ticket Creation and RSS Budget

- Ticker Review
- Demo/ Q&A



Ticker Review



The Ticker (<http://unmcspa.zendesk.com/>)

March 2021

- SPA switched to the Ticker to track all work tasks

July 2021 to March 2022

- Active for all Departments From April 2022

How do you get access?

- SPA creates Ticker accounts for new dept. admins.



The Ticker (<http://unmcspa.zendesk.com/>)

Job aid:

<https://unmcspa.zendesk.com/hc/en-us/articles/5993830748183-Job-Aid-The-Ticker-Campus-Users-Version-23-January-2023>

Page 1 of 37
Campus Users
Version Date: 23JAN23

“The Ticker” Sponsored Programs Administration (Work Task Unified Workspace & Unified Records)

Help Center:

Training & Education

Unfunded Agreements

Subawards

Awards

Proposals

About Us

SPA Staff Only

General

Recent activity

G Team

Template: Employment Attestation for Omaha VA IPAs

Article created 6 days ago 0



The Ticker (<http://unmcspa.zendesk.com/>)

Advantages

- Reduces “email overwhelm;” reduces the chance of “losing” a task
- Unified workspace/unified record
- Transparency; ability to “self-serve” a status update



The Ticker (<http://unmcspa.zendesk.com/>)

Safety net

- System
 - Prioritizes tasks
 - Type of task
 - Due date
 - Time between actions
 - Reporting
- Human
 - Analysts “sweep”
 - Managers “sweep”



The Ticker (<http://unmcspa.zendesk.com/>)

Managers “sweep”

- Triaging new tickets
- Reassigning tickets
 - Planned/unplanned absences
 - To equalize workload
- Secondary review/action
 - Submit an application
 - Sign a document
 - Release an award to SPAcctng



The Ticker (<http://unmcspa.zendesk.com/>)

How to create a ticket:

- **Create ticket in system** (demo to follow)
- **Send an email to:**
support@unmcspa.zendesk.com



The Ticker (<http://unmcspa.zendesk.com/>)

Tips on creating a ticket in the Ticker

Start by choosing the correct Form:

- **Submissions:** Proposals and other related actions (JIT, RPPR, Closeout) on a deadline.
- **G Team: Award Set up:** A Notice of Award or Grant Letter has been received and needs to be set up.
- **K Team: Open Negotiations:** All contract actions that are not on the FDP Subaward Template. This include Grant Letters that have negotiable terms and conditions.
- **K Team: FDP Subs Ticker:** Subawards on the FDP Template



The Ticker (<http://unmcspa.zendesk.com/>)

How to select the type of deadline

14) Type of Deadline (Hard, Target or NIH RPPR/GMS-Requested JIT): Select the type of deadline that corresponds with your intent to submit. In this case, we will continue the example of a NIH R01 proposal due on June 5 th . If you are unsure of your deadline type, check your FOA/RFP.	Type of Deadline (Hard, Target or NIH RPPR/GMS-Requested JIT) - Hard Deadline (Competitive Proposals or Other Submissions per Sponsor) Target Deadline (Non-Competitive Proposals and Other Submissions not on a Hard Deadline) NIH RPPR "Deadline" (Non-Competitive Proposals) NIH GMS-Requested JIT (JIT Requested by NIH Human Being - not Commons System)
---	--

Types of deadlines

- Hard deadline
- Target
- RPPR
- GMS-requested JIT



The Ticker (<http://unmcspa.zendesk.com/>)

How to discern the correct Subaward ticket:

Subproposal = G&K Submissions Form:

If another institution has requested subproposal documents for their submission to a prime funder – this is considered a proposal and typically managed by a Grants Analyst.

Subaward = K Team: FDP Form: If an institution has provided the subaward under a Federal NOA – and it is ready for review/signature, this will be managed by K Team.

*A note on Outgoing Subawards – those will be created by the Grants Analyst once the Federal Award has been set up



The Ticker (<http://unmcspa.zendesk.com/>)

A note about the “CC” field

- The system’s limitations – make this option not a good fit for the workflow.

11) CC: This field should be skipped and left blank. One of the benefits of the Ticker forms is that it allows work to be moved from email into a unified workspace. All department administrators in the same department will be able to view/add comments to each other's submitted tickets so there is no need to add them manually via this CC field.

CC (optional)

Add emails



The Ticker (<http://unmcspa.zendesk.com/>)

How to create a SPA ticket by email

When you email support@unmcspa.zendesk.com, please include:

- A brief but concise description of your request
- The PID and IFID, if known
- The due date
- PI's name and dept
- Any other relevant details, **or URLs or attachments** for grant applications

This information will help the SPA Managers quickly triage the ticket to get it to the correct SPA Analyst.



The Ticker (<http://unmcspa.zendesk.com/>)

- You do not need to CC your SPA analyst, as they will be notified via the Ticker
- Because the Support email will result in a new ticket, it should only be used to begin a new work task with SPA



The Ticker (<http://unmcspa.zendesk.com/>)

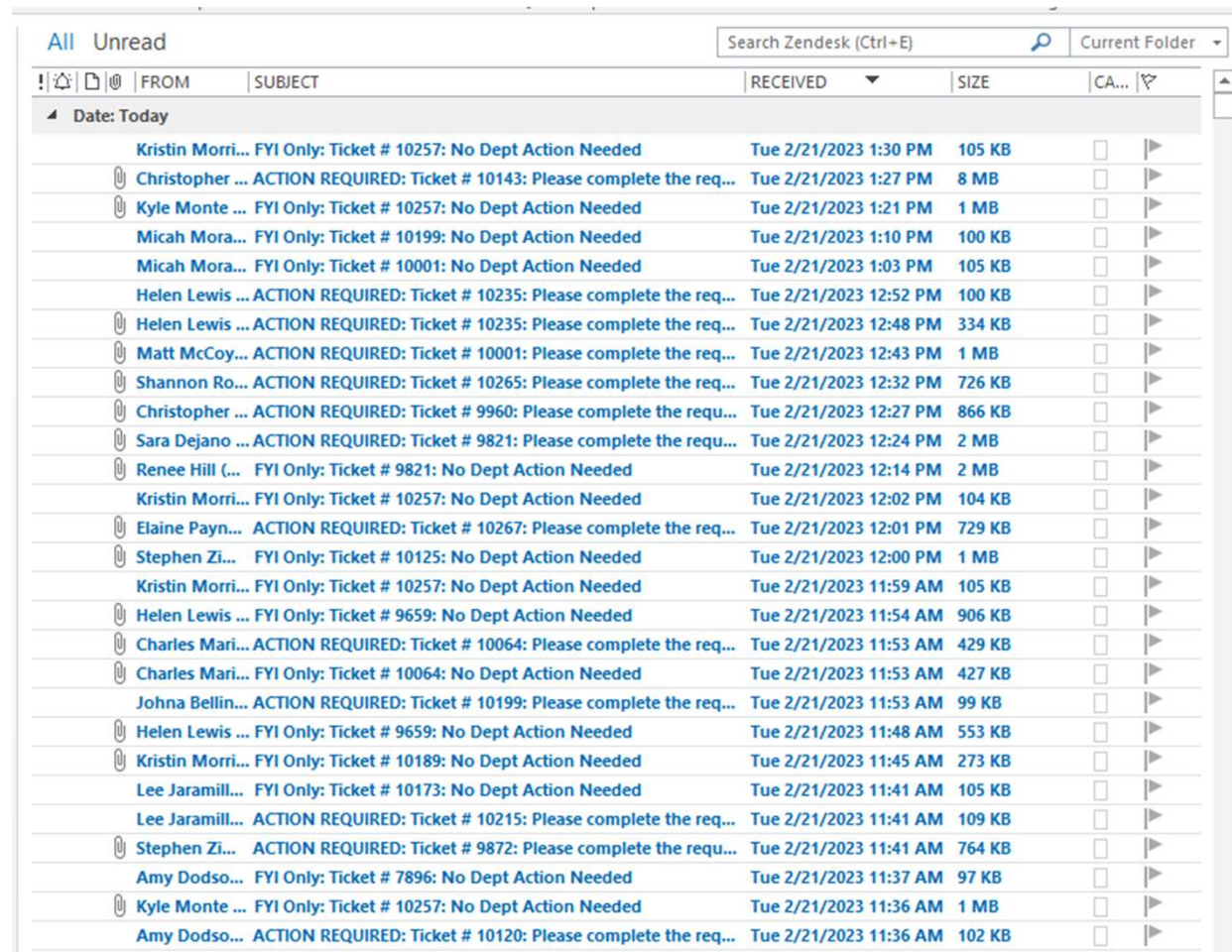
For notification

ZD Status	SPA Status	Email subject line
Blue “Pending” icon	Ball is in campus’s court	ACTION REQUIRED: Ticket # 12345: Please complete the requested action(s).
Orange “Open” icon	Ball is in SPA’s court	FYI Only: Ticket # 98765: No Dept Action Needed



The Ticker (<http://unmcspa.zendesk.com/>)

Email Notifications - SPA recommends creating a Rule in Outlook to move emails to a designated folder.




The screenshot displays the Zendesk Ticker interface. At the top, there are tabs for 'All' and 'Unread', a search bar labeled 'Search Zendesk (Ctrl+E)', and a 'Current Folder' dropdown. Below these are icons for email actions and column headers: 'FROM', 'SUBJECT', 'RECEIVED', 'SIZE', and 'CA...'. A 'Date: Today' filter is applied. The main area contains a list of 30 email notifications, each with a circular icon, a subject line, a timestamp, and a size. The notifications are sorted by time, with the most recent at the top.


FROM	SUBJECT	RECEIVED	SIZE
Kristin Morri...	FYI Only: Ticket # 10257: No Dept Action Needed	Tue 2/21/2023 1:30 PM	105 KB
Christopher ...	ACTION REQUIRED: Ticket # 10143: Please complete the req...	Tue 2/21/2023 1:27 PM	8 MB
Kyle Monte ...	FYI Only: Ticket # 10257: No Dept Action Needed	Tue 2/21/2023 1:21 PM	1 MB
Micah Mora...	FYI Only: Ticket # 10199: No Dept Action Needed	Tue 2/21/2023 1:10 PM	100 KB
Micah Mora...	FYI Only: Ticket # 10001: No Dept Action Needed	Tue 2/21/2023 1:03 PM	105 KB
Helen Lewis ...	ACTION REQUIRED: Ticket # 10235: Please complete the req...	Tue 2/21/2023 12:52 PM	100 KB
Helen Lewis ...	ACTION REQUIRED: Ticket # 10235: Please complete the req...	Tue 2/21/2023 12:48 PM	334 KB
Matt McCoy...	ACTION REQUIRED: Ticket # 10001: Please complete the req...	Tue 2/21/2023 12:43 PM	1 MB
Shannon Ro...	ACTION REQUIRED: Ticket # 10265: Please complete the req...	Tue 2/21/2023 12:32 PM	726 KB
Christopher ...	ACTION REQUIRED: Ticket # 9960: Please complete the requ...	Tue 2/21/2023 12:27 PM	866 KB
Sara Dezano ...	ACTION REQUIRED: Ticket # 9821: Please complete the requ...	Tue 2/21/2023 12:24 PM	2 MB
Renee Hill (...)	FYI Only: Ticket # 9821: No Dept Action Needed	Tue 2/21/2023 12:14 PM	2 MB
Kristin Morri...	FYI Only: Ticket # 10257: No Dept Action Needed	Tue 2/21/2023 12:02 PM	104 KB
Elaine Payn...	ACTION REQUIRED: Ticket # 10267: Please complete the req...	Tue 2/21/2023 12:01 PM	729 KB
Stephen Zi...	FYI Only: Ticket # 10125: No Dept Action Needed	Tue 2/21/2023 12:00 PM	1 MB
Kristin Morri...	FYI Only: Ticket # 10257: No Dept Action Needed	Tue 2/21/2023 11:59 AM	105 KB
Helen Lewis ...	FYI Only: Ticket # 9659: No Dept Action Needed	Tue 2/21/2023 11:54 AM	906 KB
Charles Mari...	ACTION REQUIRED: Ticket # 10064: Please complete the req...	Tue 2/21/2023 11:53 AM	429 KB
Charles Mari...	FYI Only: Ticket # 10064: No Dept Action Needed	Tue 2/21/2023 11:53 AM	427 KB
Johna Bellin...	ACTION REQUIRED: Ticket # 10199: Please complete the req...	Tue 2/21/2023 11:53 AM	99 KB
Helen Lewis ...	FYI Only: Ticket # 9659: No Dept Action Needed	Tue 2/21/2023 11:48 AM	553 KB
Kristin Morri...	FYI Only: Ticket # 10189: No Dept Action Needed	Tue 2/21/2023 11:45 AM	273 KB
Lee Jaramill...	FYI Only: Ticket # 10173: No Dept Action Needed	Tue 2/21/2023 11:41 AM	105 KB
Lee Jaramill...	ACTION REQUIRED: Ticket # 10215: Please complete the req...	Tue 2/21/2023 11:41 AM	109 KB
Stephen Zi...	ACTION REQUIRED: Ticket # 9872: Please complete the requ...	Tue 2/21/2023 11:41 AM	764 KB
Amy Dodso...	FYI Only: Ticket # 7896: No Dept Action Needed	Tue 2/21/2023 11:37 AM	97 KB
Kyle Monte ...	FYI Only: Ticket # 10257: No Dept Action Needed	Tue 2/21/2023 11:36 AM	1 MB
Amy Dodso...	ACTION REQUIRED: Ticket # 10120: Please complete the req...	Tue 2/21/2023 11:36 AM	102 KB




The Ticker (<http://unmcspa.zendesk.com/>)

To update a ticket via email


 Tue 2/21/2023 1:34 PM
UNMC Sponsored Programs Administration <support@unmcspa.zendesk.com>
ACTION REQUIRED: Ticket # 10270: Please complete the requested action(s).

To  DeCarolis, Bethany L

 You replied to this message on 2/21/2023 1:36 PM.
If there are problems with how this message is displayed, click here to view it in a web browser.

This Message Is From an External Sender
This message came from outside your organization.

Non-UNMC email
== - Please type your reply above this line - ==
[#10270 \[unmcspa.zendesk.com\]](#) - MY TEST EMAIL

 **Bethany DeCarolis** (UNMC Sponsored Programs Administration)
Feb 21, 2023, 1:34 PM CST

Status Updated: [#2 \[unmcspa.zendesk.com\]](#): Campus: Waiting Until Release to SPA for Review/Submission. The SI provide items for review/submission at least three business days before the sponsor's due date.

Thanks for letting us know.

You are an agent. Add a comment by replying to this email or [view ticket in Zendesk Support \[unmcspa.zendesk.com\]](#)

Ticket # 10270
Status Pending
Requester Bethany DeCarolis
CCs -
Group SPA Analysts
Assignee Bethany DeCarolis
Priority Normal
Type Task
Channel By Mail



When a Ticket is **NOT** needed:

Following up with the other party on the status of a contract action.

Department Administrators and Coordinators are free to follow up directly with the other institution to check on the status of an Amendment or Subaward.

Where to look for the contact:

- The Letter of Intent UNMC forwarded
- Year 1 Subaward – Attachment 3A
- Previous Amendment - central email should be noted on front page.

Exceptions: If you are providing revised proposal documents or supporting materials for the Pass Thru Entity's RPPR or JIT – SPA will review and submit



When a Ticket is **NOT** needed:

Financial Progress Reports

Sponsored Programs Accounting is responsible for the financial progress reports. You can reach out directly to SPAccounting on status.



When a Ticket is **NOT** needed:

Any contracts that are being managed by UNeHealth

- Clinical Trial Agreements
- Internal No Cost Extensions for industry clinical trials. If the WBS ends in - 888 it is a UNeHealth project and you can reach out to Amanda Leingang.



Timing on Outgoing Subaward Tickets:

- The process in SPA is when the primary grant award is set up and released to SPAccounting – the Grant Analyst will create a ticket and hand off the subaward request to the K Team. This helps prevent duplication.
- If the primary award is set up and you do not see a Sub-Out ticket – please reach out to spadmin@unmc.edu and the Grant Analyst.

Exceptions: Pilot awards for active Grants. These can occur outside the normal grant set up flow – and if a subaward or amendment is needed, please feel free to create a ticket.



What if you don't see a RPPR or JIT ticket?

If the central Zendesk email address was copied on the email notice sent from SPA (support@unmcspa.zendesk.com), a ticket is pending triage from a SPA manager – and once updated, it will be visible.





Demonstration / Q&A / Demo

Any volunteers?

