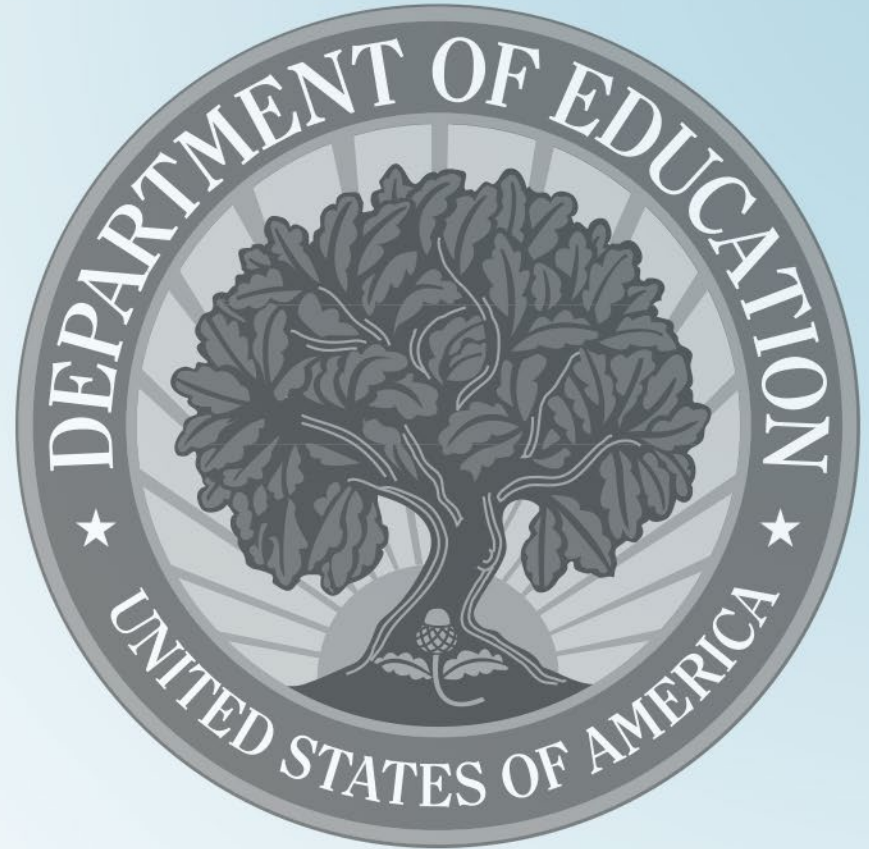# Payback Information Management System (PIMS) Digital Agreements Training

May 10, 2022

Agenda

- Changes to PIMS

- Digital Agreements Process

- Digital Payback Agreement Demo

- Digital Exit Certification Demo

- Wrap Up

Changes to PIMS

- A digital version of the Payback Agreement (PA) and Exit Certification (EC) are now available in PIMS.
  - RSA now requires grantees to use the OMB-approved digital PA and EC templates.
  - As of August 1, 2022 grantees **must** use the OMB 1820-0617 forms.
  - Hard-copy forms to download, complete, sign and upload to PIMS are available for a few months.
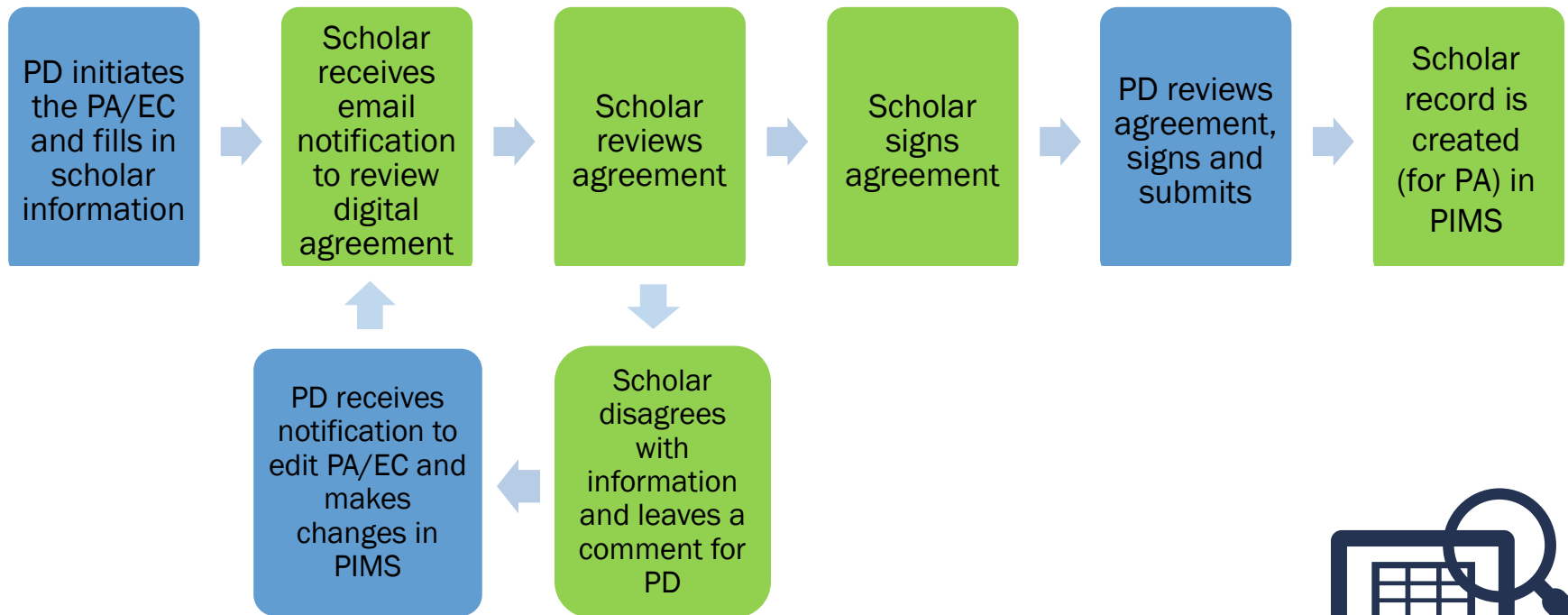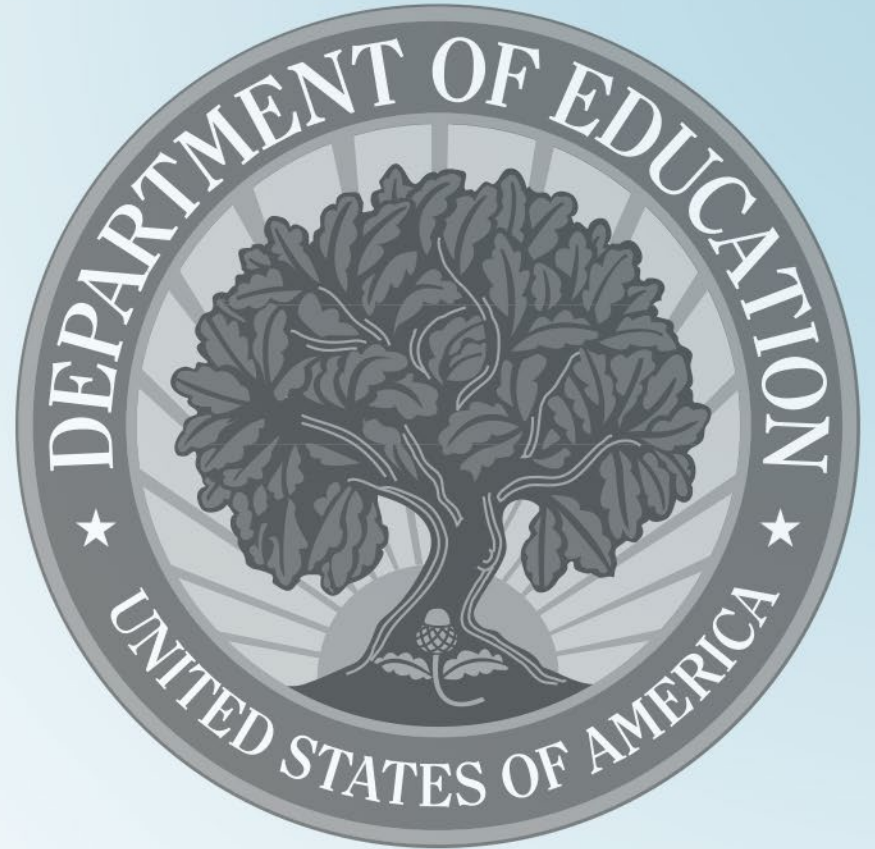
Why digital agreements?

- Digital agreements will:
  - Decrease data input burden on grantees
  - Reduce security incidents, and
  - Ensure alignment between agreements and the scholar record.

Digital agreement process

PD initiates the PA/EC and fills in scholar information → Scholar receives email notification to review digital agreement → Scholar reviews agreement → Scholar signs agreement → PD reviews agreement, signs and submits → Scholar record is created (for PA) in PIMS

Scholar reviews agreement ↓ Scholar disagrees with information and leaves a comment for PD → PD receives notification to edit PA/EC and makes changes in PIMS ↑ (back to Scholar receives email notification to review digital agreement)

# DIGITAL PAYBACK AGREEMENT DEMO

Steps to submit a digital PA

1. Project Director (PD) enters scholar data into PIMS including contact information and date of enrollment.

2. PD submits the digital PA to the scholar for review.

   - If scholar disagrees with any information, they will provide a message explaining the discrepancy and return the PA to the PD.

3. PD revises the PA to address scholar comments (if necessary).

4. Repeat step 2 (if revisions are made).

5. Once they agree, the scholar will sign the agreement and submit to the PD for final review.

6. PD reviews and signs the agreement.

7. PIMS uses the information in the agreement to create a scholar record. PD must still review and finalize the scholar record.

DIGITAL EXIT CERTIFICATION DEMO
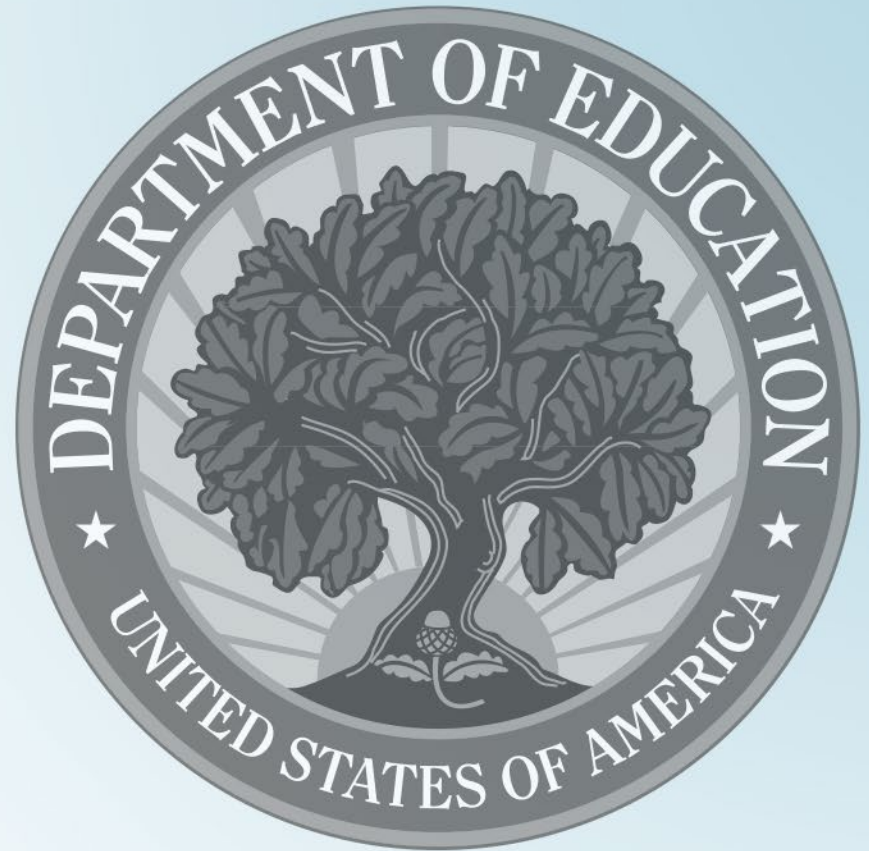
Digital vs. physical agreement?

Digital:

- Enter scholar information into PIMS

- Scholar reviews information and indicates any issues

- Both parties communicate through PIMS until both approve and sign

- Scholar info is automatically entered into PIMS from the digital agreement

Physical:

- Scholar and IHE meet to discuss agreement and sign paperwork

- IHE enters scholar information into PIMS and uploads a signed **redacted** copy of the agreement

Timelines for agreements

	PA	EC
When do scholars and grantees sign the agreement?	To **officially enroll** in the grant-supported program, scholars must sign and complete a PA.	To **officially exit** from the program, scholars must sign and complete an EC.
When do grantees submit the agreement in PIMS?	Upload or submit within 30 days of the scholar receiving funding and enrollment.	Upload within 30 days of the scholar's exit.

Resources for Grantees

Questions