Brown Bag Luncheon Series: PT View & Reporting Update

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Adie O. McCalmon, RE Project
IRES@yale.edu

IRES Supporting Yale’s Research Enterprise
Agenda

• PT View Update
  • Training Status
  • Panel Discussion
• IRES Reports Updates
• Q&A Session
IRES Proposal Tracking (PT) View provides the capability to view proposal and award information in the IRES Proposal Tracking (PT) module.

It allows you to:

- Verify proposal information submitted to GCA;
- View the status of proposals, contracts, and awards;
- Review compliance (i.e., human and animal subjects approvals and COI) related information; and
- Review award setup information.
<table>
<thead>
<tr>
<th>Wave</th>
<th>Total Trainees</th>
<th># of Departments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pilot 1</td>
<td>16</td>
<td>10</td>
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<tr>
<td>Wave 1</td>
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<td></td>
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<tr>
<td>Pilot 2</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Wave 2</td>
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<td></td>
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<tr>
<td>Pilot 3</td>
<td>17</td>
<td>17</td>
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<tr>
<td>Wave 3</td>
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</tr>
<tr>
<td>Total</td>
<td>190</td>
<td>39</td>
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</tbody>
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Meet The Experts

Panel Members:

Maureen Bogan, *GCA Team Leader*
maureen.bogan@yale.edu; 203-785-6929

Cheryl Magoveny, *GCA Team Leader*
cheryl.magoveryn@yale.edu; 203-737-2381

Don Deyo, *Director of International Agreements and Export Control Licensing Grant*
donald.deyo@yale.edu; 203-785-3817

Cynthia Kane, *Sr. Business Analyst & Project Manager*
cynthia.kane@yale.edu; 203-927-0050
Frequently Asked PT View Questions

• How and why should I use PT View to view pre-award data?

• What orgs will I have access to for viewing information?

• Is there a way to view all the details about a specific proposal in one place?

• Will I receive alerts when progress reports are due?

• With whom should I speak if I cannot find the information I need in PT View or my data is inaccurate?
Do you have any questions regarding:

– Proposal Submission
– Contracts
– Award Set Up
– Reporting
PT View Next Steps

- Future Training Opportunities
- Proposal Development (PD) Pilot
## New Reports

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Report Description</th>
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<tbody>
<tr>
<td><strong>Portfolio Report</strong></td>
<td>The <strong>Portfolio Report</strong> provides users with aggregate and detailed views of pre-award data.</td>
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<tr>
<td><strong>Portfolio Allocation Report</strong></td>
<td>The <strong>Portfolio Allocation Report</strong> provides information to assist with budgeting.</td>
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<tr>
<td><strong>Historical Data Component</strong></td>
<td>The <strong>Historical Data Component</strong> will be added to the Portfolio and Portfolio Allocation Reports. The historical data will include non-converted GPAS and Coeus records.</td>
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