

OSP News & Updates

Office of Sponsored Projects

1/9/2020

2020 Volume 1, Issue 1

The [OSP News & Updates](#), published by the Office of Sponsored Projects, is a bi-weekly subscription-based newsletter that provides OSP and sponsor updates and reminders, quick facts, guidance and training in all aspects of sponsored projects administration. [Subscribe to OSP News & Updates](#)ⁱ

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1 ANNOUNCEMENT – FRANK KINNEY

We are pleased to announce that Frank Kinney from Huron Consulting is now serving in the role of Interim Senior Director, Financial Management and Business Analytics in the Office of Sponsored Projects (OSP). Frank will be overseeing the Financial Management (post-award operations) and the Business Analytics groups within OSP and will have a dual report into the Offices of Research Administration (ORA) and Finance ([view org chart](#)).

Frank has an extensive background in financial leadership positions, having served most recently as the Interim Controller here at Yale. Prior to coming to Yale, Frank served as the Interim Controller for the University of North Carolina at Chapel Hill, and he previously worked at KPMG in Chicago for over fifteen years, where he became a partner focused on higher education and other non-profit clients. He also served as the interim leader for the grants and contracts office at the University of California at Berkeley and worked at the University of Chicago as a member of the finance staff, playing several interim leadership roles.

Please join us in thanking Frank for all the contributions he made to the Controller's office and welcoming Frank to OSP and ORA. He is located in room 331 in the Office of Sponsored Projects.

Steve Murphy
Vice President of Finance and Chief Financial Officer

Pamela S. Caudill
Senior Associate Provost for Research Administration

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2 IT'S OFFICIAL – WE'RE RETIRING THE WORKDAY WEBFORM AND PPG SPREADSHEET

Effective January 20th, the Workday Award Setup Webform and PPG spreadsheet will be retired and no longer accepted for award setups. Instead, departments must use the new [Award Budget Setup form](#) ("ABS form") that combines both the Workday Award Setup Webform and PPG Spreadsheet into one form. Thanks for the positive feedback from those of you who are already using the ABS form (see article below regarding recent revisions made to the ABS form).

OSP will go over the new process at the next Brown Bag meeting. The ABS form is located on the [OSP Forms webpage](#) > Resources > OSP Forms. Departments will upload the ABS form directly into the applicable IRES record. To gain access to IRES, users must complete the IRES Departmental User Access Request form.

3 AWARD BUDGET SETUP (ABS) FORM REVISED

A revised ABS (Award Budget Setup) form has been posted online. *If you downloaded a copy of the ABS form prior to break, please be sure you download the revised form dated 12/13/19.*

The changes will not affect users, or the information requested, but technical changes were made to ensure information is uploaded properly into IRES.

The ABS form was changed so that users will no longer be prompted to open the form in read only mode and it will now automatically open in edit mode. In addition, one field name was protected so that it cannot be inadvertently changed. There were no changes made to the content of the form.

Remember, all OSP forms, including the ABS form, have been moved to the new [OSP Forms webpage](#). To navigate to OSP forms using a web browser start at: your.yale.edu > select Research Support > select OSP > select Resources > select Forms.

4 IRES PT – AGREEMENTS SPINE FIX

We have returned previous functionality in IRES related to agreements in the spine of the PT record. You can now expand the agreements tab and also each agreement within that tab. This will allow you to view the list of attachments in each agreement on the spine instead of having to go into each individual agreement. This is functionality that was lost during the last upgrade. Please note that you may need to clear your browser



Agreements (5)	
Subrecipient - Incoming	+
Sub Recipient - Incoming Amend/Mod	+
Sub Recipient-Incoming Amend/Mod	+
Sub Recipient-Incoming Amend/Mod	+
Sub Recipient-Incoming Amend/Mod	+

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cache to see the returned feature (ctrl+shift+delete to clear your cache). If you have any issues with this feature, please contact ires@yale.edu.

5 OSP STAFF UPDATES

5.1 FINANCIAL MANAGEMENT

We are happy to announce that **Ashley Jones** joined OSP on January 2, 2020 as an accountant in the Financial Reporting group. Ashley comes to Yale and OSP from the outside bringing with her accounting experience from both the public and private sector. We are pleased to have her on our team!

6 OSP TRAINING

6.1 UPCOMING BROWN BAG MEETING

Join us for the January 16th Brown Bag session. [Visit the TMS Brown Bag webpage](#) to register for in-person or remote attendance. This month's agenda items are still in the planning phase and will be listed in TMS once confirmed.

6.2 BROWN BAG SURVEY FOLLOW-UP

6.2.1 12-Month vs. 9-Month

We have received the following comments to past BB surveys:

- A discussion of 12-month vs 9-month appointments would be valuable
- I'd like to learn more about 12-month and 9-month appointments

[Policy 1316](#) covers Effort Commitment: Managing Effort Associated with Sponsored Projects. If there are specific questions about this topic, please email them to osp.trainings@yale.edu and we'll respond in an upcoming newsletter or BB meeting.

When suggesting topics for future Brown Bag meetings via the BB survey, the submissions are anonymous, so please be specific with your requests; or email osp.trainings@yale.edu and we'll have an opportunity to contact you if we need more information.

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6.2.2 Navigating Award Tabs in Workday

We received a BB survey question about navigating award tabs in Workday. The Workday Sponsored Awards training page contains both a [View Award Event video](#) and a [View Award Event training guide](#) which reviews the Workday Sponsored Award tabs, in addition to what and where information can be found in Workday. If you have specific questions about this topic, please email osp.trainings@yale.edu

View the [Workday Sponsored Awards training website](#) for additional training resources on Award Closeouts, Effort Certification, Workday Grants, and other relevant topics.

6.3 CLINICAL TRIAL BUDGETING TRAINING – NO PREREQUISITES

We have staff on campus who deal extensively with clinical trial budgeting but are not involved with other aspects of sponsored projects administration and so there are no prerequisites to attend the Clinical Trial Budgeting class. Encourage those in your departments who are working on clinical trials to attend the class. The next class is scheduled for Wednesday, February 5, 2020. [Register now](#).

6.4 UPCOMING CLASSES

OSP classes are designed for Research Administrators and those in DBOs (department business offices) who manage sponsored projects. Attend a class to learn more about the issues you deal with in your office or take a refresher to stay up-to-date. [Register to attend](#) an OSP training class.

January 14 [Effort Reporting Principles](#): This module provides administrators with a comprehensive understanding of the principles of effort reporting and documenting activities as it relates to sponsored awards including:

- Key terms, policies, procedures and regulations
- Effort management activities from proposal through closeout
- Key roles and responsibilities
- Understanding the effort reporting lifecycle, with case studies, e.g., appointing faculty and staff, proposing effort, charging salaries...
- Key roles and responsibilities
- An overview of the effort certification process in Workday

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January 28-29 **[IRES Proposal Development \(PD\)](#)**: This course is designed for those who will be creating grant proposals and budgets in IRES PD. The sessions are a combination of lecture and hands-on exercises and include:

- IRES Overview
- Introduction to PD
- Proposal initiation & creation (system to system and non-system to system)
- Basic and advanced budgeting
- Certification and approval process overview
- Proposal creation workshop support

PD class registration closes 10 days prior to the class start date as extensive class setup time is required.

February 3 **[Research Compliance for Administrators](#)**: focuses on the principles of research compliance that research administrators need to know when managing sponsored awards including:

- An overview of regulatory compliance
- Conflict of Interest (COI) disclosure requirements at Yale
- Human Research Protection Program (HRPP) and IRB reviews
- Regulations, guidance and policies regarding Animal research
- Yale's department of Environmental Health and Safety (EHS) and how they monitor safety concerns on campus
- Policies and regulations regarding Export Controls

February 5 **[Clinical Trial Budgeting](#)**: This module provides information about industry-sponsored (non-federal) clinical trial budgeting and how to build budgets that result in the full recovery of costs.

Topics covered:

- A review of the clinical trial budget development process
- The preparation an internal budget: what can and cannot be included
- A description of associated costs and hidden costs
- Regulatory and sponsor requirements
- Consistency review across study documents
- Budget monitoring and discussion of post award activities
- Resources supporting effective clinical trial budgeting

ⁱ Thank you to all who have contributed to this newsletter. Please direct questions or suggestions regarding newsletter content to Tracy Coston at osp.communications@yale.edu or tracy.coston@yale.edu. Use the following link to [unsubscribe to OSP News & Updates](#). For archived issues, visit [OSP News & Updates archives](#).