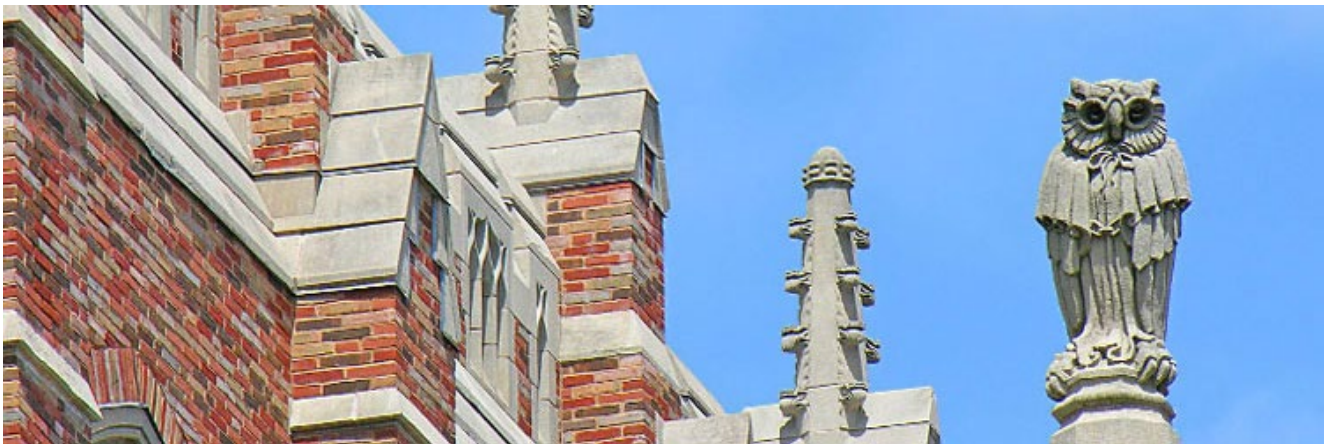


Research Administrators *NEWS & UPDATES*

The [Research Administrators News & Updates](#) is a bi-weekly e-newsletter published by the Office of Sponsored Projects (OSP) at Yale University. It is a subscription-based newsletter that provides updates and reminders, quick facts, guidance and training information in all aspects of research administration. [Use this link to manage your Research Administrators News & Updates subscription.](#)



News Items Vol. 1, Iss. 2 | January 29, 2024

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1. NIH R01 Deadline Reminders

In preparation for the NIH R01 deadline on Monday, February 5th,

please note the following:

Friday, February 2nd Proposal Review and Submission Activities

The Proposal Team will:

- review proposals in the order received.
- approve and submit (if no changes are required), or return the proposal for corrections, all proposals received by OSP before 2:00 p.m. on February 2, 2024. Proposals received after 2:00 p.m. may not be reviewed until Monday, February 5, 2024.

Monday, February 5th Proposal Review and Submission Activities

- Proposals will continue to be reviewed in the order received. Please ensure that proposals are submitted to OSP as early as possible to allow sufficient time to resolve issues (including system issues) and make corrections. Proposals ***will not be reviewed out of order for any reason.***
- If a last-minute submission is expected, let your OSP Proposal Manager know as soon as possible.

Satisfying Compliance Requirements and Other Reminders

- If there is effort/salary for personnel from departments outside of the responsible cost center, that Department Business Office must be included in the PD route to review and approve the effort in the proposal.
- All PIs/PDs (PI, Multiple PIs,) named in an application must complete Sponsored Projects Administration Training for Faculty. The training and quiz can be accessed by clicking on the following link:
https://bmsweb.med.yale.edu/tms/tms_enrollments.offerings?p_crs_id=1073&p_std_id=#
- The PI and other Yale proposal personnel must complete, prior to submitting the proposal to the sponsor, the following:

[Patent Policy Acknowledgement and Agreement](#) (all Yale individuals listed in the proposal)

- Current [External Interests Disclosure form](#) (for Sr/Key personnel)
- Current [VA MOU](#), if applicable

- **PLEASE NOTE:** Training links will change effective January 29, 2024 due to conversion to Workday Learning. The updated links are:

- Faculty SPA WDL link:
[https://www.myworkday.com/yale/email-universal/inst/17816\\$188/rel-task/2998\\$29489.html](https://www.myworkday.com/yale/email-universal/inst/17816$188/rel-task/2998$29489.html)
- COI Form WDL link:
[https://www.myworkday.com/yale/email-universal/inst/17816\\$207/rel-task/2998\\$29489.html](https://www.myworkday.com/yale/email-universal/inst/17816$207/rel-task/2998$29489.html)
- PPAA Form WDL link:
[https://www.myworkday.com/yale/email-universal/inst/17816\\$197/rel-task/2998\\$29489.html](https://www.myworkday.com/yale/email-universal/inst/17816$197/rel-task/2998$29489.html)

The following resources may also be of assistance in the preparation of a proposal:

- Yale Institutional Information
<https://your.yale.edu/research-support/office-sponsored-projects/institutional-information>
- NIH Page Limits
http://www.grants.nih.gov/grants/forms_page_limits.htm

On behalf of the OSP Proposal Team, we appreciate your cooperation and collaboration in facilitating the timely and accurate submission of proposals..

2. NCURA January Campus

Liaison Newsletter

View the [January 2024 NCURA Campus Liaison Newsletter](#) with information regarding upcoming NCURA events, resources, and content.



3. Workday Learning: Yale's Future Learning Management System

Today, **Monday, January 29th**, Yale replaced their Training Management System (TMS) with Workday Learning. Find out more during an upcoming **Learner Awareness session** to discover what's changed, what's coming, and how learning will become part of our work at Yale. Topics will include:

- **Reimagined Learn & Grow site** - for all things Learning & Development
- **Launch of new learning management system**, Workday Learning (replacing TMS) for learning and growth and compliance requirements
- **A revitalized learning catalog** that is robust, easily searchable, accessible, and designed to evolve and grow over time.

[Reserve your spot for one of the upcoming 45-minute sessions.](#)

Additional Workday Learning resources include:

- Access self-paced training and resources via the [Workday Learning Training](#) page
- View the [Workday Learning FAQs](#)



4. Update: Procedure 3417 Human Study Participant Remuneration

Effective **Wednesday, January 10, 2024**, [Procedure 3417 PR.01 Human Research Study Participant Remuneration](#) was updated to enhance and clarify the available options for remunerating and reimbursing study participants, expanding the guidance related to remuneration methods that rely upon spend authorizations (i.e., advances). The procedure was enhanced with:

- Clarified options for remunerating and reimbursing study participants
- Detailed process steps and guidance
- Clarified roles and responsibilities of those involved in the process

New forms have been developed to provide departments with standardized tools to guide users through the process and adhere to the expectations outlined in the procedure. To access the forms, click on the links below:

[3417 FR.01 Study Participant Disbursement Request Form](#)

[3417 FR.02 Participant Research Record Log](#)

[3417 FR.03 Monthly Reconciliation Form](#)

[3417 FR.04 Reloadable Debit Card Tracker](#)

[3417 FR.05 Study Participant Remuneration Methods Summary Matrix](#)

Should you have any questions or concerns, please email the Finance Support Center at askfinance@yale.edu.

[Read More](#)



5. RA Webinar: Cost Transfer Phase 2

[As previously announced in the January 10 Business Update,](#)

effective **Wednesday, January 24, 2024**, there there will be changes to the Cost Transfer policy and procedures.

The Cost Transfer Phase 2 project will simplify and clarify the the Cost Transfer policy, update related Workday processes, reason codes, and questionnaire, and consolidate the review process to the SPFA compliance team, resulting in enhanced efficiencies and compliance, strengthening controls, decrease in audit findings, and minimizing potential funding losses.

We invite you to attend the Cost Transfer Phase 2 Information Sessions scheduled for **February** to learn more.

Register now for one of the following information sessions:

- [Wed. Feb. 7, 2024 via Zoom, 11 a.m. – 12 p.m. ET](#)
- [Thurs. Feb. 15, 2024, via Zoom, 3 p.m. – 4 p.m., ET](#)
- [Thurs. Feb. 22, 2024 via Zoom, 10 a.m. – 11 a.m. ET](#)
- [Wed. Feb. 28, 2024 via Zoom, 2 p.m. - 3 p.m. ET](#)

These sessions offer an excellent opportunity to gain insights into the key changes within the Cost Transfer policy, procedures, forms and the Workday systems. Additionally, we will cover reason codes, usage scenarios, and conduct a system demo.

Should you have any questions or concerns, please reach out to Sharmell Williams at sharmell.williams@yale.edu. Your attendance and input/questions are greatly appreciated.

[Read More](#)



6. Careers related to Research Administration

There are currently several job openings related to research administration across Yale. Please feel free to share the below opportunities with eligible candidates. Referral awards of \$1,500 - \$2,000 are available for eligible staff. *Please visit the [Employee Referral Program website](#) for details.*

Openings:

Accounting Supervisor (84751BR)*Sponsored Projects Financial Administration*

Reporting to the Manager of Financial Reporting in the Office of Sponsored Projects Financial Administration, the Accounting Supervisor is responsible for supervising a team of individuals within the financial and reporting services group for all sponsored projects at the University. Manage all aspects of work activities to ensure the highest quality of customer service, financial reporting, award set up, award closeouts and compliance with accounting principles, sponsor requirements, state and federal guidelines as well as University policies and procedures.

Assistant Director of Export Controls (80447BR)*Export Controls*

The Assistant Director of Export Controls works with the Director to ensure Yale's compliance with laws related to international trade, restricted party screening, and technology transfers.; The person in this position is responsible for working with internal clients in determining the proper course of action to comply with regulations regarding exports, deemed exports, proposal and contract reviews, reimbursements, international travel, and restricted party screening. Specific Responsibilities of this role include: Approve certain physical export shipments by assigning appropriate Export Control Classification Numbers (ECCNs), making license determinations, and filing EEs when required through eShipGlobal. Review regulatory issues related to proposal submission to identify potential export control concerns. Review the terms and conditions of awards and agreements, including awards, grants, NDAs, CDAs, and other agreements as they relate to export controls, particularly the Fundamental Research Exclusion. Manage interactions with faculty, staff, and outside parties in relation to the Yale's export control compliance obligations and facilitate the ability of these individuals to successfully perform the functions of their position while maintaining compliance with export control laws, including Technology Control Plans when required. Advise the Office of International Students and Scholars on the export control attestation determination of certain visa applications. Work with Procurement and Accounts Payable through Workday to resolve supplier and payment concerns related to export controls. Track the submittal of general correspondence and license applications. Review restricted party hits across Yale's campus, resolve escalated hits, and oversee the auditing of campus-wide restricted party screening activity. Conduct awareness training throughout campus. Work with the Office of General Counsel, as well as other departments, on Yale programs with export control implications. Document specific situations and international transactions in accordance with export control laws. Assist with the writing of policies and procedures related to export controls. Assist with updating an internal website to maintain current information accuracy. Committee service and other duties as

needed.

Assistant Director, Proposal Management (85861BR)

Office of Sponsored Projects

Reporting to the Director of Proposal and Award Management in the Office of Sponsored Projects, the OSP Assistant Director position has primary responsibility for the overall daily operations of the proposal team, overseeing the workflow to ensure timely review and submission of federal and non-federal research proposals from across the University, and ensuring that the team is trained on current procedures and university business practices. The successful candidate for this position will provide leadership to a fast-paced team, provide high-level assistance to departmental staff and investigators to ensure adherence to sponsor and University policy and serve as subject matter expert and liaison for the Integrated Research Enterprise Solution (IRES) system. The role has delegated signature authority for official documents related to grant and contract proposal submissions. The role will also support the continuous and ongoing improvement initiatives associated the functions of the proposal team as well as the Proposal Development (PD) module of Integrated Research Enterprise Solution (IRES). The Assistant Director will also participate in the development and implementation of training modules and communication of sponsored projects activities to research community.

Assistant Director, Research Security (84991BR)

Office of Research Integrity

This position's primary focus will be working with Yale faculty, staff, and students to support and safeguard research and scholarship. The primary role of this position will oversee several important compliance issues to support researchers and Yale's efforts to promote international research collaborations consistent with applicable laws, regulations, policies, and guidance pertaining to research security; remaining abreast of national trends in research security compliance; maintaining awareness of relevant privacy, data security, and data sharing laws of countries where Yale collaborative research is occurring; providing advice on national trends and enforcement activities affecting the research enterprise, including those involving foreign activities; and collaborating on the preparation of communications for affected members of Yale's research community. This position will also be asked to provide advice and assistance on advance approval and disclosure requirements related to faculty member's external institutional or funder relationships and reviewing instances of incomplete disclosure or reporting of external activity. The Assistant Director will assist in developing and implementing a tracking system.

Associate Director of SPFA (83471BR)

Controller - Controller's Office

The Associate Director of SPFA is responsible for overseeing the

financial management and administration of sponsored projects within the organization. This position plays a critical role in ensuring compliance with financial regulations, optimizing financial performance, and providing strategic financial guidance for SPFA. The Associate Director collaborates closely with internal stakeholders, principal investigators, sponsors, and external partners to support successful financial management. Additionally, the Associate Director will manage post-award financial analysts, oversee Letter of Credit drawdowns for federal agencies, accounts receivable for Sponsored awards, and assist with finance projects related to grants.

Compliance Coordinator (82094BR)

Conflict of Interest Office

Under the direction of the Director of the Conflict of Interest Office, and with broad latitude for discretion and independent judgment, the Compliance Coordinator is responsible for the day-to-day activities associated with reviewing financial interests disclosed by faculty and other individuals who are responsible for the design, conduct or reporting of research, and for evaluating such interests in accordance with University policy and federal or other sponsoring agencies' Conflict of Interest (COI) regulations and/or policies.

Contract Manager (84675BR) Remote options available

Office of Sponsored Projects

Reporting to the Office of Sponsored Projects' (OSP) Lead Contract Manager, Clinical Trials Management, the Contract Manager (CM) provides support to the Yale School of Medicine (YSM) faculty and administrators regarding the successful negotiation of corporate clinical trial agreements (CTAs) and other related agreements. The CM is responsible for the negotiation/acceptance of awards on behalf of Yale University that support the activities of YSM. It is the responsibility of the CM to ensure that the terms and conditions of YSM awards comport with University policies and provides administrative support as appropriate, during the life of the award. The CM will provide YSM faculty and administrators guidance regarding interpretation of award terms and conditions, keep abreast of changes in University policy, federal regulations, sponsor requirements, and be a valuable and reliable resource to OSP and the community overall.

Financial Analyst 2, Post Award (86182BR)

Faculty Research Management Services Post Award

Reporting to a Manager of FRMS Post-Award, provide analytical and financial services, guidance and consultation to faculty and staff optimizing a PI's use of research funds for awards within assigned portfolios across departments. Provides high levels of client satisfaction through strong relationship management efforts. Lead quality assurance initiative while supporting the development of resources for training and best practices.

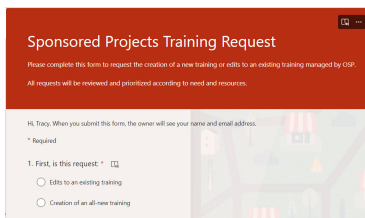
Responsible for financial and budgetary management of a primary portfolio as well as support for secondary portfolios comprised of multiple departments, federal and non-federal sponsors. Conducts complex modeling for a PI's portfolio of accounts to develop long and short-term resource plans. Creates and updates financial plan(s). Adjusts reporting and analysis to accommodate sponsor requirements. Cultivates working partnerships and communications with faculty, PIs, OSP and department administrators. Mitigates risks with sponsor noncompliance.

Subaward Manager (85943BR)

Office of Sponsored Projects

Reporting to the Associate Director, Subaward Management, this position provides support to Yale's cutting-edge research by drafting, administrating and executing outgoing subawards issued under grants and contracts. These duties involve interpretation of award terms and conditions, negotiation, and adjusting to changes in a fast-paced industry. This position acts as the primary manager for handling outgoing subaward related issues, advising/educating departmental personnel, and contributing to process improvement. The Subaward Team is a fun, dynamic group of people who love to learn and have a passion for supporting Yale's vast research enterprise. This position is offering on-site, hybrid or largely remote work schedules.

Visit [Yale Careers Homepage](#) for more information.

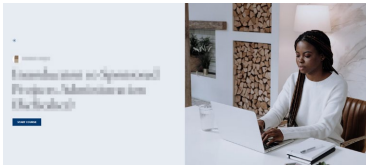


7. Sponsored Projects Training Request Intake Form

Requests to edit sponsored projects trainings can be made via the Sponsored Projects Training Request intake form. Both requests to edit existing trainings as well as requests to create a new training can be submitted via the intake form. All requests will be reviewed and prioritized according to need and resources. [Access the intake form.](#)

The intake form can be found on our [training webpage](#) at any time.

8. Sponsored Projects Training



[Visit Yale's Workday Learning](#) for course descriptions and registration (*VPN required*).

*Courses with an asterisk have had recent content edits.

On-Demand [eLearning](#)

- [Allocating Allowable Costs](#)
- [Applying Cost Allocation Methodology](#) (*previously: Cost Allocation Methodology*)
- [Cost Sharing on Sponsored Projects](#)
- [Cost Transfer Principles](#)
- [Direct Charging of F&A Type Costs on Sponsored Awards](#)
- [Export Compliance by CITI Program](#)
- [Introduction to Sponsored Projects Administration](#) (and [refresher!](#))
- [Managing Subaward Invoices](#) (*previously: Subaward Management Overview*)
- [Principal Investigator Eligibility: Who Can Be a PI?](#)
- [IRES Agreements for Clinical Trials](#)
- [IRES Proposal Development \(PD\) for Contracts](#)
- [IRES Proposal Development \(PD\) for NIH RPPRs](#)
- [IRES Proposal Development \(PD\) Training](#)
- [IRES Proposal Tracking \(PT\) Overview](#)
- [NIH K Award Fundamentals](#)
- [Other Support and Third-Party Agreements Library](#)
- [Principles of Effort](#)
- [Subrecipient Basics and Monitoring](#)
- [What Research Staff Need to Know About Spending Sponsored Projects Funds](#)

NCURA Webinars

View videos of recent National Council of University Research Administrators (NCURA) webinars by visiting the [Sponsored Projects Research Administrator Training webpage](#).

Yale

Office of Sponsored Projects and [Contact Email](#).

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