

OSP News & Updates

Office of Sponsored Projects

1/27/2022

2022 Volume 1, Issue 2 - **UPDATED**

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 NIH FEBRUARY 5TH R01 PROPOSAL DEADLINE ACTIVITIES AND REMINDERS

In preparation for the NIH R01 deadline on Monday, February 7th, please note the following:

Friday, February 4th 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 4th, 2022. Proposals received after 2:00 p.m. may not be reviewed until Monday, February 7th, 2022.

Monday, February 7th 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.

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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,) of 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](#) (only individuals identified in the proposal as being responsible for the conduct, design, or reporting of the research)
 - Current [VA MOU](#), if applicable
- The following resources may be of assistance in the preparation of a proposal:
 - Yale Frequently Needed Facts <https://your.yale.edu/research-support/office-sponsored-projects/resources/frequently-needed-yale-facts>
 - 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 ELIMINATION OF SPFA FINANCIAL STATUS REPORT NOTIFICATIONS

*Effective immediately, Sponsored Projects Financial Administration will no longer send monthly FSR reminders/escalation emails to departments regarding financial packets that are due. Departments should continue to utilize the **Sponsored Report Tracking (Award Tasks) – Yale** report by Institutional Due Date, to determine awards with a financial report due and the due date for submission to SPFA. All signed draft FSR and other required documentation, if applicable, must be submitted to SPFA on/before the Institutional Due Date.*

In accordance with [Policy 1301: Sponsored Projects Financial Reporting and Closeout](#) and [1101 FR.01 Financial Review Checklist](#) Department Business Office (DBO) or Business Support Unit are expected to run the Sponsored Report Tracking (Award Tasks) Yale report at least monthly if not more frequently, in order to identify awards that are ending, and/or have a financial report coming due. This report indicates

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the sponsor's financial report due date, as well as the date the draft financial report is due to SPFA (Institutional Due Date or IDD).

Below are definitions and uses of the below Workday Statuses for Financial Reporting tasks:

Status	Definition/Use
Pending	Report outstanding, no financial packet received from DBO
Complete	Report filed on or before due date, financial packet received from DBO
Complete - No FSR Received	Report filed on or before due date, financial packet NOT received from DBO
Complete -With Adjustments	Report filed on or before due date, financial packet received from DBO but included expenses not posted to G/L
FSR Initial Received Department	Financial packet received by SPFA
Not Submitted	Financial report not submitted, rare. IE, billing, and no expenses to bill
Overdue	Financial report late to sponsor. IE, sponsor system issue, late award set up

3 OTHER SUPPORT RESOURCES

The Resources section at the bottom of the [OSP Other Support website](#), contains links to an assortment of helpful information and guides. This section includes instructions for creating an Adobe Sign e-signature (be sure to download the most recent copy of Adobe Creative Cloud), a link to the Third-Party Agreements Library, instructions for running the Other Support report, videos of Other Support meetings, and more... *This website is being updated regularly, so check back frequently for additional information.*

Use this link to view a [video of the NIH Other Support Faculty Town Hall](#) held on January 19, 2022. For future viewing, this video will be posted on the [OSP Other Support website](#) by next week.

Reminder: [Other Support and Third-Party Agreements Library self-paced training](#) is available online. This training provides the steps necessary to create the NIH Other Support JIT and RPPR submissions,

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including use of the Third-Party Agreements Library and creating the Other Support Page. Additionally, this training provides guidance on the NIH-required Third-Party Agreements developed to assist departmental staff with gathering information related to sources of support from external entities that are not found in any Yale database or cannot be easily identified, such as but not limited to in-kind support, certain gifts, and outside consulting activities.

4 NEW IRES PD QUICK GUIDE: CREATING A REVISED BUDGET CHILD RECORD

A new [PD Quick Guide: Creating a Revised Budget Child Record](#) is now available on the [OSP Resources website](#). This guide walks users through the process of creating a revised budget child record in IRES Proposal Development (PD) which is required when a sponsor requests a revision to the originally submitted proposed budget.

5 NCURA WEBINAR: WORK SMARTER, NOT HARDER

Have you ever been working on a project or process and known there must be a better way? Are you tired of spending hours brute forcing a solution to a problem? Is your office full of administrative fires that keep cropping up at 4PM for a 5PM deadline? This webinar will address the history and theory of working smarter using tools and processes available to anyone at any level. You have the power to implement these types of changes, even if you don't have backing from your department.

A new NCURA Webinar: [Work Smarter, Not Harder: The Tools, Methods and Technology to Increase Productivity!](#) is now available for viewing; this webinar will be posted on the [OSP Research Administrator Training website](#) for future viewing.

6 NCURA CAMPUS LIAISON PROGRAM

Following is a link to the [December 2021 NCURA Campus Liaison newsletter](#) with information regarding upcoming NCURA events, resources, and content.

If you have any questions about NCURA, please feel free to contact Lisa Mosley at lisa.mosley@yale.edu.

7 OSP TRAINING

Visit the [OSP Grants and Contract TMS training website](#) for a description all OSP classes or to register for a class (*VPN required*). Registrations for instructor-led classes close several days prior to class. Until further

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notice, all instructor-led classes will be held via Zoom. Zoom links and class handouts are emailed to registered students prior to class.

Instructor-Led Training (ILT): Upcoming Classes

- February 3: Financial Reporting and Closeout
- February 8: Research Compliance Principles for Administrators
- February 21: Introduction to Sponsored Projects Administration
- March 16: Clinical Trial Budgeting
- April 19: Proposal Development (IRES PD)
- April 29: Fly America Act and Open Skies Agreement
- June 22: Effort Reporting Principles

Online self-paced learning

The following OSP training courses are available online. If after completing the course, you have any questions about the course content email osp.trainings@yale.edu and we will forward your question to the appropriate subject matter expert.

- Allocating Allowable Costs - Online
- Clinical Trials: Create a Clinical Trial Record in PD - Online
- Cost Transfer Principles - Online *Revised*
- Direct Charging of F&A Type Costs on Sponsored Awards - Online
- Effort Reporting Principles – Online *New*
- Export Compliance (CITI Program) - Online
- IRES Proposal Tracking (PT) Overview - Online
- NIH K Award Fundamentals - Online *New*
- Other Support and Third-Party Agreements Library - Online
- Subrecipient Basics and Monitoring - Online
- What Research Staff Need to Know About Spending Sponsored Projects Funds - Online

NCURA Webinar Videos

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

- **Audits: What's Hot**

This webinar provides an in-depth look at audit issues is provided through a combination of audit trends, a review of Federal audit reports, and a discussion of day-to-day best practices.

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- **Cost Share: Tackling the Challenges**

This webinar discusses how cost share challenges are tackled throughout the life of the project. Case studies are used to demonstrate how to proactively manage cost share.

- **In-N-Out: Here's What PI Transfers are all About**

This webinar takes an in-depth look at the PI transfer process and provides you with questions to ask and the things to look out for in order to be prepared to handle a PI that is either coming in or leaving from their institution.

- **Participant Support Costs: An Overview of Dos and Don'ts**

This webinar will help you understand what participant support costs are and why they are special. Discussions include: the rules and regulations governing participant support costs; how to budget, set up, and manage participant support costs; and audit considerations.

- **Work Smarter, Not Harder: The Tools, Methods and Technology to Increase Productivity!**

This webinar will review the history and theory of "Work Smarter Not Harder" through examination of related research administration case studies; discuss methods of organizing work to be more effective, efficient, and productive; and review tools and tricks that increase productivity and save time. This course will be posted on the OSP Research Administrator Training website soon. [View the webinar now.](#)

- **Coming in February: Guidance on the Preparation of NIH Research Performance Progress Report (RPPRs) with COVID-19 Impacts and Other Support**

The NIH issued guidance regarding the preparation of Research Performance Progress Reports (RPPRs) and the reporting of effects of the COVID-19 pandemic on research projects and revised their definition of Other Support. This session will review who must report, when to report, what to report and how to report.

¹ 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](#).