

OSP News & Updates

Office of Sponsored Projects

3/4/2021

2021 Volume 1, Issue 5

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

Table of Contents

1. [Revisions to Cost Allocation Methodology Guide and Cost Allocation Methodology Form](#)
2. [Financial Reporting Group Name Change](#)
3. [New Security Measures for OSP Classes and Brown Bags](#)
4. [March OSP Brown Bag Agenda](#)
5. [March OSP Brown Bag: What's On Your Mind: Q&A](#)
6. [OSP Training](#)
7. [OSP Staff Updates](#)

1 REVISIONS TO COST ALLOCATION METHODOLOGY GUIDE AND COST ALLOCATION METHODOLOGY FORM

Modifications to the *Cost Allocation Principles and Methodology Guide* and *Cost Allocation Methodology Form*

During January 2021, [Guide 1304 GD.02 – Cost Allocation Principles and Methodologies](#) and [Form 1304 FR.09 Cost Allocation Methodology](#) were modified and posted. Important enhancements to both documents are as follows:

- [Guide 1304 GD.02 – Cost Allocation Principles and Methodologies](#):
 - Inclusion of examples of allocation situations requiring special attention and consideration; and
 - Documentation of Benefit and Allocation – Provides specific requirements for requestors (PI, Co-PI, authorized designee) and preparers when executing transactions.
- [Form 1304 FR.09 Cost Allocation Methodology](#):
 - Added the ability to use the form to document proportional method percentages.
 - Added to the “Optional” authorization, a statement that a completed [1310 FR.05 – Delegation of Requestor for Sponsored Project](#) is on file in the department.

Questions regarding each of these documents can be directed to John Maloney at John.Maloney@yale.edu.

OSP News & Updates

Office of Sponsored Projects

3/4/2021

2021 Volume 1, Issue 5

2 FINANCIAL REPORTING GROUP NAME CHANGE

The Office of Sponsored Projects' Financial Reporting Group has been renamed the Sponsored Projects Financial Administration (SPFA) team. There are no functional responsibility changes for the team – this is a change in name only and better aligns with the updated reporting structure to Finance that was effective in December 2020.

3 NEW SECURITY MEASURES FOR OSP CLASSES AND BROWN BAGS

In accordance with emails received from the University Secretary's office and IT Security, we will be increasing Zoom security for future OSP Brown Bag meetings and OSP classes in order to prevent any Zoom bombings or outsider disruptions. Zoom meetings will now be setup with the "Require authentication to join" setting enabled.

What does this mean for participants joining a meeting?

When you click the Zoom link it is likely a login screen will open. **Be sure to select the SSO option**, and then log into CAS with your NetID and password. You may want to join the next BB meeting a few minutes early to get familiar with the new procedure. If you run into any issues, contact the ITS Help Desk at 203-432-9000.

4 MARCH OSP BROWN BAG AGENDA

There is a lot to cover in the March Brown Bag meeting! While the BB planning committee is still in the process of organizing the next meeting, some topics that will be addressed include: Professional Services and Consulting Agreements (PSCAs), IRES PD Update, Limited Submissions Update, a New Award Checklist, a new RPPR Checklist and Website, What's On Your Mind Q&A, and more...

5 MARCH OSP BROWN BAG: WHAT'S ON YOUR MIND: Q&A

Have a question about managing an award? We will answer your questions during the **What's on Your Mind Q&A** portion of the March 17th Brown Bag meeting. If the question is specific to your department then we will forward it to one of our OSP SMEs (subject matter experts).

Submit questions to: osp.trainings@yale.edu. *The deadline for submitting questions is 3:00pm, Thursday, March 11, 2021.*

OSP News & Updates

Office of Sponsored Projects

3/4/2021

2021 Volume 1, Issue 5

6 OSP TRAINING

Upcoming Class: Financial Reporting and Closeout

A few seats are still available for the March 9th *Financial Reporting and Closeout* class. [Registration](#) closes **Friday, 3/5**. This 2-hour class is designed to walk attendees through the award closeout process and review information that business office administrators need to know when closing out a sponsored award.

Join Tuesday's class to learn more about the following topics.

- The roles and responsibilities of those involved in financial reporting and closeout
- Policies and procedures related to these functions
- University processes supporting sponsor requirements
- The closeout process cycle
- The steps necessary to properly close sponsored awards

Instructor-Led Training (ILT): Upcoming Classes

[Registration](#) is open for the following OSP Zoom classes. Use the links below to view course descriptions and register for a class (VPN required).

- March 9: [Financial Reporting and Closeout](#) *Registration closes Friday, 3/5*
- March 22, 23, 24, 25: [Introduction to Sponsored Projects Administration](#)
- April 13, 14, 15: [IRES Proposal Development \(PD\)](#)
- May 12: [Effort Reporting Principles](#)

Online self-paced learning

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

- [Allocating Allowable Costs - Online](#)
- [Cost Transfer Principles - Online](#) - this course is in the process of being updated to reflect recent University policy changes. We will let you know when this course is back online in an upcoming OSP News & Updates email.
- [Direct Charging of F&A Type Costs on Sponsored Awards - Online](#)
- [Export Compliance \(CITI Program\) - Online](#)

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- [IRES Proposal Tracking \(PT\) Overview - Online](#)
- [Subrecipient Basics and Monitoring - Online](#)
- [What Research Staff Need to Know About Spending Sponsored Projects Funds - Online](#)

7 OSP STAFF UPDATES

Please join us in welcoming the newest members to join the OSP Subawards Team:

- **Beth Kingsley**, Associate Director – Subawards Management, effective Monday, March 1, 2021
- **Robert Prentiss**, Sr. Financial Analyst – Subawards Management, effective Monday, February 1, 2021

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](#).