

# OSP News & Updates

Office of Sponsored Projects

4/7/2022

CORRECTION  
2022 Volume 2, 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](#)<sup>i</sup>

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## 1 ALLOWABLE COSTS

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The Office of Management and Budget's (OMB) Uniform Guidance ([2 CFR §§ 200.420 and 200.403](#)) and Yale's [Procedure 1305 PR.04](#) provide the principles to be applied when determining the allowability of certain costs. These principles apply whether or not a particular cost is treated as a direct cost or indirect (F&A) cost. Highlighted in the table below are examples of typical allowable costs (such as salaries, research supplies, and travel) and examples of costs that are not permitted as either a direct or F&A cost, such as, promotional items and memorabilia (models, gifts, and souvenirs), alcohol, and fines and penalties (i.e., parking tickets).

Certain costs such as advertising and public relations may be permissible depending on the circumstance. For example, the cost of recruiting personnel required for the performance of a Federal award (see [§ 200.463](#)), or public relation costs required by the federal award, or costs of communicating to the public and press about specific activities or accomplishment resulting from the performance of the award may be allowable. However, advertising and public relations costs designed solely to promote Yale would not be allowable.

When determining the allowability of a cost, review the terms and conditions of the award, Yale's [Procedure 1305 PR.04](#), and the Uniform Guidance. Once these documents have been reviewed and if

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there are additional questions regarding the allowability of a cost, please direct the questions to the appropriate [OSP Award Manager](#).

Examples of Allowable Costs	Examples of Unallowable Costs
<ul style="list-style-type: none"><li>• Salaries and benefits for employees who work directly on the sponsored award</li><li>• Supplies and materials necessary for the performance of the sponsored project including computing devices &lt; \$5,000 that are essential and allocable</li><li>• Travel associated with the project or presenting results of the project</li><li>• Equipment</li><li>• Consultants</li><li>• Subawards</li><li>• Laboratory fees and patient care costs</li><li>• F&amp;A costs (also known as overhead or indirect costs)</li></ul>	<ul style="list-style-type: none"><li>• Advertising (certain types may be allowable)</li><li>• Promotional or memorabilia costs</li><li>• Alcoholic beverages</li><li>• Alumni/ae activities</li><li>• Bad debt, losses, collection and related legal costs</li><li>• Bank fees</li><li>• Commencement and convocation</li><li>• Contingency provisions</li><li>• Donations and contributions</li><li>• Entertainment costs</li><li>• Fines and penalties</li><li>• Fund raising and investment costs</li><li>• Housing and personal living costs</li><li>• Lobbying</li><li>• Losses on sponsored awards</li></ul>

## 2 2801 GD.01 DEPOSITS OF SPONSORED PROJECT PAYMENTS

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Content from **2801 GD.01 Deposits of Sponsored Project Payments** has been updated and moved to the OSP/SPFA Cash Management webpage, link here: [Cash Management | It's Your Yale](#).

## 3 NEW SERVICE FOR GRANT-FUNDED TRAVEL

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### 3.1 SUMMARY

To ensure compliance with [Federal grant funding agency requirements](#), Yale Travel Management will soon provide a new travel booking platform for federal grant-funded travel. The new platform is provided by World Travel, Inc. (WTI) and will be configured to help Yale *federal grant-funded travelers* make compliant travel arrangements starting in May 2022.

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- The WTI platform provides an easy-to-use premium travel booking platform that will help Yale grant-funded travelers avoid extra work and penalties due to non-compliance with federal grant-funding agency requirements. (See [compliance requirements](#).)
- Impacted stakeholders will receive additional information regarding training in advance of the new platform launch. Additional information will also be posted on the [Yale Travel Management website](#).
- This change pertains only to travel booked using federally sponsored awards. Yale's current Egencia travel booking service should continue to be used to book all other travel, including trips related to grants that are not federally funded.

## 3.2 DETAILS

**Key Benefits:** Travelers using WTI travel booking platform will benefit from:

- An easy-to-use **self-service online booking platform**.
- **24/7 access** to experienced travel consultants by phone, email, text, or live chat.
- **travel alerts** to inform travelers about potential impacts to their travel plans (e.g., weather-related issues, schedule changes, applicable waivers, etc.)
- **savings tools**, including post-ticketing technology that continuously monitors changing market prices and searches for lower rates.

**Platform Launch Timing:** We expect the WTI travel booking platform to launch in May. Any federally grant-funded travel that has already been booked will remain with Egencia or on the platform it was booked on.

**Platform Training:** Training on the new travel booking platform will be provided to Yale community members by WTI in the coming weeks.

## 3.3 QUESTIONS

Please email [travel@yale.edu](mailto:travel@yale.edu) with questions regarding this new platform and service.

## 4 PI MEETINGS GUIDE

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OSP is happy to announce the development of the new PI Meetings Guide through the efforts of the Campus-wide Collaborative Training Committee (CCTC).

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The purpose of this new document is to assist Department Business Offices (DBOs) when meeting with the Principal Investigator (PI) of an award and reviews the following:

- (1) Topics to cover in PI meetings,
- (2) Meeting timepoints and frequency, and
- (3) Additional considerations when meeting with the PI.

The PI Meeting Guide is divided into tabbed sections. Each section provides agenda items and additional considerations regarding a point in time/event that may transpire when managing an award. Tabs and table content can be customized to include additional events/steps that may be required by a department or a sponsor.

The new PI Meetings Guide is located on the OSP Resources webpage. Link: [Resources | It's Your Yale](#) under the title: "PI Meeting Guide".

## 5 NCURA WEBINAR: AGENCY UPDATES WITH OMB, NSF, AND NIH

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This webinar is comprised of three sections: 1) OMB Update, 2) NSF Update, 3) NIH Update. Discussions include new developments related to proposal and award policy; a comprehensive review of recent policy changes; a review of major updates to NSF's proposal system modernization efforts; NIH's budget priorities; compliance requirements and more!

The videos and handouts for this webinar can be viewed on the [OSP Research Administrator Training website](#).

## 6 MARCH 2022 NCURA CAMPUS LIAISON NEWSLETTER

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[View the March 2022 NCURA Campus Liaison Newsletter](#) with information regarding upcoming NCURA events, resources, and content.

If you have any questions about NCURA, please feel free to reach out to Lisa Mosley at [lisa.mosley@yale.edu](mailto:lisa.mosley@yale.edu).

## 7 OSP TRAINING

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Visit the [OSP Grants and Contract TMS training website](#) for a description all OSP classes or to register for a class (*VPN required*).

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## Instructor-Led Training (ILT): Upcoming Classes

Until further notice, all instructor-led classes will be held via Zoom. Zoom links and class handouts are emailed to registered students prior to class. Registrations for instructor-led classes close several days prior to class to allow time for class setup.

- April 11: Proposal Development (IRES PD)
- May 9: Introduction to Sponsored Projects Administration
- May 19: Clinical Trial Budgeting
- May 24: Financial Reporting and Closeout
- June 22: Effort Reporting Principles
- July 28: Fly America Act and Open Skies Agreement
- To be scheduled soon: Research Compliance Principles for Administrators

## 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](mailto: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
- 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
- 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](#).

- **Agency Updates with OMB, NSF and NIH - NEW**  
This session is comprised of three sections: 1) OMB Update, 2) NSF Update, 3) NIH Update.

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Discussions will include new developments related to proposal and award policy; a comprehensive review of recent policy changes; a review of major updates to NSR's proposal system modernization efforts; NIH's budget priorities; compliance requirements and more!

- **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.

- **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.

- **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.

- **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.

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<sup>1</sup> 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](mailto:osp.communications@yale.edu) or [tracy.coston@yale.edu](mailto:tracy.coston@yale.edu). Use the following link to [unsubscribe to OSP News & Updates](#). For archived issues, visit [OSP News & Updates archives](#).