OSP News & Updates

Office of Sponsored Projects   **10/31/2019**   2019 Volume 4, Issue 3

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 INVOICE DATES OUTSIDE OF GRANT DATES – REMINDER

OSP has received a large number of requests to extend Grant end dates to accommodate posting of Supplier Invoice, where the invoice date is outside of the Grant dates. Refer to the [Invoice Date Outside of Grant Dates](#) Training Guide when processing Supplier Invoices with an invoice date that is outside of the Grant Dates. Note, if the invoice date is within 90 days of the Contract End Date, no action is needed by OSP.

2 OSP TRAINING

2.1 BROWN BAG MEETING

2.1.1 Questions from Previous Meeting

Thank you to everyone who filled out our Brown Bag survey – we appreciate your feedback!

Our goal is to respond to every question either in the OSP News and Updates newsletter or in a future Brown Bag presentation. If you want a response to a specific question, be sure to include your email address or send your question directly to osp.trainings@yale.edu.

Questions regarding the ESAP (External Sales Approval Process) presentation:

- Can you provide more clarification on what qualifies as an ESAP versus an OCR matter?
- How do I determine if something is handled by ESAP or OSP?
- Our group often has non-standard situations that we're not sure what to do with.

Answer:

- If you are not sure whether your situation should be handled by OSP, OCR or ESAP, send it to whichever group or person you think is most appropriate or with whom you generally work. If you send it to the "wrong" person or it's unclear who is the "right" person, then OSP, OCR or ESAP will redirect you to the right person or the three units (OSP, OCR and ESAP) will work together to figure out which process is most appropriate.
- For any questions regarding ESAP, contact cynthia.nethercut@yale.edu

Questions regarding the PSCA (Professional Services Consulting Agreements) presentation:

- If I have specific questions regarding our agreement who should I call?

Answer:

- For any questions regarding PSCA, contact konstantza.popova@yale.edu

2.1.2　Upcoming Brown Bag Meeting

Join us for the November 13th Brown Bag session. Visit the TMS Brown Bag webpage to register and view the event details. This month's agenda items are still in the planning phase and will be listed in TMS once confirmed.

2.2　UPCOMING OSP 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.

Introduction to Sponsored Projects Administration: This course is designed to be an overview of the sponsored projects process from pre-award to post award and closeout and relevant for those who manage some part of the award process. Attendees include those new to research administration or those who would like a refresher or an overview of the entire life-cycle of an award. Topics covered include:

- Award basics and terminology
- Preparation, submission, negotiation and acceptance

- Award setup and managing an award
- Reporting obligations, award closeout and audits

Allocating Allowable Costs: This instructor-led course is for individuals who prefer interactive classroom learning; for those who took the online course but would like to discuss questions related to the course; or for those looking to review updated information and refresh their knowledge.

This module provides individuals with an understanding of Yale's policies and procedures concerning the allowability and allocation of costs associated with sponsored awards.

The purpose of this course is to increase participants' understanding of:

- Yale's policies and procedures concerning the allowability and allocation of costs associated with sponsored awards
- The difference between allowable and unallowable costs
- What constitutes an acceptable allocation methodology

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.

3 SPONSOR UPDATES

3.1 ERA REMINDER: USE OF ORCID IDS FOR XTRAIN APPOINTMENTS AND USE OF XTRACT FOR TRAINING TABLES

As was mentioned in the last Brown Bag meeting, this is a reminder of the following two requirements that went into effect Tuesday, October 1, 2019.

ORCID iD

First, the use of the ORCID iD is required for the appointment process for trainees, scholars, and participants supported by institutional research training, career development, and research education awards that require appointments through the xTrain system, including the following:

T03, T15, T32, T34, T35, T37, T42, T90/R90, TL1, TL4, TU2, K12/KL2, R25, R38, RL5, RL9

At the time of appointment, the xTrain system will check whether appointees have ORCID iDs and appointments will be not be accepted for agency review unless an ORCID iD is linked to the individual's eRA Commons Personal Profile.   You can link your ORCID iD to your Personal Profile in eRA Commons or set up an ORCID iD to connect to your Personal Profile (see steps).

xTRACT

Second, the use of the xTRACT system in the eRA Commons is required to prepare the required data tables for Research Performance Progress Reports (RPPRs) for pre- and post-doctoral research training grants.

Recipients must create the required training data tables for submission with NIH and AHRQ T15, T32, T90/R90, and TL1 progress reports via the xTRACT system. To submit the Research Performance Progress Report (RPPR), the training tables must be completed and finalized in xTRACT. Once the tables are finalized in xTRACT, they will automatically be included in the RPPR. Users will not be able to submit RPPRs that are not in compliance. Guidance on preparing the required tables for the RPPR are available in the xTRACT online help and on the Data Tables website.

For more information, see Guide Notice NOT-OD-19-109 for the use of ORCID iD, Guide Notice NOT-OD-19-108 for the use of xTRACT, and eRA Items of Interest - July 2019 for articles on both topics.