1 NEW WORKDAY AWARD SETUP WEBFORM

In preparation for the launch of Workday Financials on July 5th, the Office of Sponsored Projects (OSP) created a new webform, **Workday Award Setup**, to aid in the accurate setup of a new Workday award, modifications to an existing Workday award (if there are changes required) or setup of an At-Risk account\(^1\). The new webform is for use by Department Business Offices to help with capturing award and grant structure information needed by OSP to setup an award in Workday. Information requested includes Award and Grant Names, number of lines and their associated funding. The webform can be submitted at any time in advance of the receipt of an award or before final acceptance of an agreement or Clinical Trial. However, once an award is received from a sponsor, the form must be provided to OSP if it has not already been submitted. Without this information, OSP will be unable to begin the setup in Workday Financials.

The Workday Award Setup webform is located on the Resources page of the OSP website and can be accessed directly at [https://your.yale.edu/workday-award-setup-webform](https://your.yale.edu/workday-award-setup-webform).

Once the overall award structure has been determined, the new webform must be completed and submitted to OSP (by clicking “Submit” at the bottom of the form). Once received, OSP will upload the form to the applicable IRES record to be later retrieved by the OSP Accountants when the award is ready for setup.

NOTE: Business Offices and PIs, will be sent a copy of the sponsored award notice or fully executed Agreement from OSP when it is received by Yale. Business Offices should review the documents to determine the appropriate setup for the Workday Award. For grants, it is recommended that there be a review of the sponsored award notice against the proposal to determine what changes were made by the sponsor (e.g. budget reduction). If changes in scope or effort are required, communication must be made with the sponsor through your authorized official in OSP.

\(^1\)This form does not replace the At Risk Request form or process.
2 USDA/NIFA IMPLEMENTATION OF THE RESEARCH TERMS AND CONDITIONS

The USDA/National Institute of Food and Agriculture’s (NIFA) has implemented the Research Terms and Conditions (RTCs). This information is posted on the NSF RTC website. The USDA/NIFA Implementation is effective June 30, 2017.

As part of this implementation, OSP has posted the revised RTC Appendices A (Prior Approval Matrix), B (Subaward Requirements), and USDA/NIFA Agency Specific Requirements to our website.

In addition we would like to remind you to consult with your faculty on a regular basis to ensure any action requiring prior approval is submitted to the Federal agency before it takes place to ensure we are in compliance with this requirement.

If you have any questions regarding the prior approval process please contact your Award Manager.

3 OSP STAFF UPDATES

Financial Management

Congratulations to Elvira Barbiero on her recent promotion to Accounting Supervisor. In this new role, Elvira will manage a team of individuals who provide high quality customer service to faculty, business administrators and sponsors. Elvira will lead the team to manage the overall financial aspect of their sponsored projects, and ensure timely and accurate submission of financial reports, Workday award setup, cost transfer review and closeout.