The OSP News & Updates, published by the Office of Sponsored Projects, is a semi-monthly subscription-based newsletter that provides OSP and sponsor updates and reminders, quick facts, guidance and training in all aspects of sponsored projects administration. To subscribe, visit https://messages.yale.edu/subscribe.

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1. **Reminder – Workday Webform Requirements for Award Setup**

With the implementation of Workday, the Workday Webform was created to provide Department Business Offices (DBOs) the tools to help capture award and grant structure information needed by OSP to accurately set up an Award and its related Grants in Workday Financials.

The webform is required for new Sponsored Awards, new Clinical Trials, initial At-Risk requests and Amendments where changes to the account structure needs to be made. Without the form, the setup in Workday Financials cannot be completed and will remain pending until it is received.

As of 3/1/18, there were 17 awards pending setup in Workday Financials due to missing Webforms. If the Webform is missing, the DBO will be contacted requesting the information and the setup held until it is received. If you have been contacted by OSP for this form, please submit it as soon as possible and notify the individual who contacted you so that the setup can be completed.
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. 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 send a confirmation receipt and will upload it to the applicable IRES record to be later retrieved by the OSP Accountants when the award is ready for setup.

**Important things to remember when completing the Webform:**

**Award Name** – this unique name is chosen by the PI/Business office to be entered in the Workday Award Header. This name will print on reports generated out of Workday, including Effort Certification, so should be a name that will be recognizable to the PI and the Department.

**Cost Center** – the Cost Center on the Workday Award Header should be the Award Owning Cost Center. Cost Centers can be different on the Grant Lines in the Award Structure section of the Webform (see below for further clarification).

**Award Structure** – this section provides the structure for the Workday Award Lines. The department can determine the structure of the Award in a more granular fashion, when required, as long as it adheres to the terms of the award notice and the funding provided by the sponsor. Specific information that builds the structure includes:

- **Grant Name**: If different than the Award Name. If there are multiple grants, they will need to have unique Grant Names. Grant names for outgoing Subawards should begin with SubK and the name of the Subrecipient.

- **Cost Center for Grant**: If different than the Award Owning Cost Center. This is specifically useful for program-projects or awards where funding may be split, such as when the award is a Multiple PI Grant or has supplemental funding.

- **Funding Amount**: If different than the Authorized Amount due to multiple grant lines (Note: total funding of the combined grant lines cannot exceed the sponsor funding).

- **Assignee**: This is the Grant PI and should include the PI Name and Net ID. This field will be used not only for the Worktag on the Grant, but also will populate the Principal Investigator Role assignment which impacts reporting for the business offices (by PI).
2 PROCESSING AWARDS FORMERLY KNOWN AS “W” AWARDS IN WORKDAY FINANCIALS

With the implementation of Workday, the process for creating an account for awards formerly known as “W” Awards has changed. The negotiation of these awards is still supported by the Office of Sponsored Projects (OSP), but the financial setup is now driven by the Business Offices.

OSP uses the criteria listed below to determine if the agreement can be set up and managed by the Business Office:

- No financial reporting to sponsor required other than invoicing reflecting the total sum owed by Sponsor to Yale
- No contract provision that unused funds need to be returned to sponsor
- No contract provision for audit by Sponsor

If the terms of the agreement satisfy the above criteria, OSP will complete the compliance checks on the award and set it up in IRES Proposal Tracking.

The IRES Award Setup Team (ASU) will then send the signed agreement to the Department Business Office (DBO) out of the IRES Communications Tab with notification that the agreement is fully executed and set up in IRES and provide guidance on next steps for initiating the process for a project in Workday.

The Department will then be responsible for requesting a New Project from COA utilizing the form found on the Workday@Yale Chart of Accounts site. Once the project has been created, follow the YSM training guide, Non-Sponsored Custom Set Up Request or Change Request.

Additional Department steps include:

1. Run “Find Customers – Yale” in Workday to determine if the customer already exists in Workday and the information is correct.
2. If not, complete the Yale University Customer Registration Form to update the customer information.
3. When the department receives notification that the customer has been setup or modified, email the following to ysminvoicing@yale.edu:
   a. Fully Executed Contract
   b. New Project Information
   c. Workday Invoice Template
The Cost Center Customer Contract Specialist in YSM will then create a contract and its related billing schedule in Workday.

If you have any questions about this business process, or if you need further clarification, please contact your OSP Contract Manager or Cynthia Kane at cynthia.kane@yale.edu.

3  PD PILOT – CLINICAL TRIAL AGREEMENTS

The Clinical Trial team has started its pilot of IRES Proposal Development (PD) with the Cancer Center, Cardiology, Neurology, Pediatrics and Psychiatry. These departments will work with the OSP team to determine any issues in rolling PD out to all departments with Clinical Trial submissions. We expect the pilot to be completed by mid-April. Stay tuned for further updates. Please reach out to Jeffrey Allen, jeffrey.allen@yale.edu with any questions.

4  YCCI/OSP CTA BUDGET AND CONTRACT DASHBOARDS

In a collaborative effort to provide transparency and improve communications, YCCI, OSP and the School of Medicine provide weekly dashboards of pending clinical trial budget and contract negotiations. We are approaching our one year anniversary of providing these updates. The dashboards consist of a global dashboard, showing the status of CTAs at the School of Medicine; a department dashboard, showing the status of CTAs for your department; and a detailed report which explains the background information for the department dashboard.

If you are involved in Clinical Trial research and are interested in being added to the distribution list for your department, please reach out to Liat Modiano, liat.modiano@yale.edu or Kelly M. Anastasio, kelly.anastasio@yale.edu.

5  REGISTER FOR MARCH BROWN BAG SESSIONS

Please join us for one of the following OSP March Brown Bag sessions: Tuesday, March 13 or Wednesday, March 14.

Topics for the March session include:

- Workday Reminders
- External Sales Agreements or Awards formerly known as “W” awards
• Update: from the OSP Contracts Team
• Cost Reimbursable & Fixed Fee Subawards
• Update: PD for Clinical Trials
• Update: Workday Financials – Grants Continuous Improvement
• And more…”

Visit TMS to view event times, locations and register for a session.

Please contact osp.trainings@yale.edu if you have any questions.

6 SPONSOR-RELATED UPDATES & REMINDERS

6.1 NATIONAL SCIENCE FOUNDATION

6.1.1 Research.gov Proposal Preparation - Site Review and Submission Site Initial Release

The National Science Foundation (NSF) announced that beginning on April 30, 2018, proposers will be able to prepare and submit full, research non-collaborative proposals in Research.gov. The initial release of this new Research.gov capability will run in parallel with existing FastLane proposal preparation and submission capabilities. Proposers can choose to prepare and submit full, research non-collaborative proposals in Research.gov or in FastLane starting on April 30, 2018.

In addition, NSF is previewing the new Research.gov proposal preparation functionality to the research community to collect preliminary feedback and to provide the community an opportunity to acclimate to the new technology. The preview can be accessed by selecting the “Prepare & Submit Proposals” tab on the top navigation bar after signing in to Research.gov and then choosing “Prepare Proposal.” This preview will continue until 8:00PM EDT on April 27, 2018, and will allow any research community user with a FastLane or Research.gov account to sample the following proposal preparation features prior to the initial release on April 30, 2018:

• Initiate full, research non-collaborative proposals (other proposal types are planned for future releases);
• Add Principal Investigators (PIs), Co-PIs, Senior Personnel, and Other Authorized Users;
• Upload required proposal documents;
• Create budgets;
• Check compliance; and
• Enable Sponsored Project Officer (SPO)/Authorized Organizational Representative (AOR) access for review.

Please be aware of the following important items as you test the new functionality during the preview period:

• All test data entered on the Research.gov proposal preparation site from February 26, 2018, until the preview concludes at 8:00PM EDT on April 27, 2018, will be deleted at the end of the preview period.
• NSF will not be able to recover any proposal test data entered during the preview period and deleted by NSF after the preview period concludes.
• Information entered on the Research.gov proposal preparation site during the preview period will not be submitted to NSF.
• Test data can be entered on the Research.gov proposal preparation site but actual proposals cannot be submitted to NSF via Research.gov during the preview period.
• Additional information will be available on a Research.gov “About Proposal Preparation & Submission Site” page accessible on the Research.gov homepage.

6.2 NATIONAL ENDOWMENT FOR THE HUMANITIES

6.2.1 NEH Increases Award Amount for NEH Fellowships

On February 21, 2018, the National Endowment for the Humanities (NEH) announced they have increased the monthly stipend awarded through its fellowships program.

NEH Fellowships support advanced research in the humanities toward the production of articles, books, digital materials, archaeological site reports, translations, editions, or other scholarly resources in the humanities.

The program accepts applications from individual researchers, teachers, and writers to pursue full-time, continuous humanities research projects for a period of six to twelve months. All successful applicants will receive a $5,000-a-month stipend—an increase of $800 a month over previous year.

The increased stipend also applies to NEH-Mellon Fellowships for Digital Publication, a fellowship program sponsored jointly by the NEH and The Andrew W. Mellon Foundation to support individual scholars pursuing interpretive research projects that require digital expression and digital publication.
Application guidelines for NEH Fellowships and the NEH-Mellon Fellowships for Digital Publication are available at the NEH website. The next application deadline for both fellowship programs is April 11, 2018.

Applicants may contact program staff in NEH’s Division of Research at 202-606-8200 or fellowships@neh.gov to discuss proposed research projects and questions about the application process.

The NEH awards approximately 80 NEH Fellowships and 10 NEH-Mellon Fellowships for Digital Publication per year. Recent NEH Fellowship awards.

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1 Thank you to all who have contributed to this newsletter. Questions about this newsletter should be directed to osp.communications@yale.edu. To unsubscribe, visit https://messages.yale.edu/subscribe. For archived issues, visit OSP News & Updates archives.