RDA Working to Improve Setup Process

Research Development and Administration (RDA) has embarked on a project to improve the award setup process. The goal is to help investigators complete their compliance requirements and access their project funding as soon as possible. The involved RDA units are examining the current procedures and identifying ways to both streamline processes and decrease the amount of time required for award setup.

Research Grants and Contracts (RGC) and Sponsored Projects Administration (SPA) will be discussing this improvement project in more detail, including the project goals and how departments can provide feedback, at future Sponsored Projects Information Network (SPIN) meetings. Department administrative staff are encouraged to attend and participate in these discussions.

RDA will also be working closely with departments to obtain feedback on the award setup process, current improvements already underway, and ideas for further improvement. The RGC Pre-Award Process Group, with representatives from several OHSU Schools and Units, has begun discussing this improvement project and will continue to partner with RGC and SPA on this project in future meetings.

Questions/Comments:
• Thomas Marcussen, Director, Research Grants and Contracts (RGC) / Pre Award, 418-4430 or marcusse@ohsu.edu
• Lynette Arias, Director, Sponsored Projects Administration (SPA) / Post Award, 494-1193 or ariasl@ohsu.edu

Current Effort Period Ends Dec. 11, 2005

Sponsored Projects Administration (SPA) encourages department effort coordinators and other department administrative staff to prepare now for the end of the current effort period on December 11, 2005. After the close date all Labor Distribution (LD) adjustments that affect pay prior to that date (even by one day) will fail LD effort validation, and additional justifications will be required from the department. Please take advantage of opportunities to process any necessary adjustments before the effort period closes.

Another important benefit of completing LD adjustments prior to the effort period close date is that effort statements printed and distributed by SPA will be correct, and such statements will not need to be amended prior to certification.

Effort certification for the Dec04-Jun05 period was one of the most successful batches ever, so there is every reason to anticipate a smooth effort season this January. SPA thanks everyone for such valuable assistance in making OHSU’s effort certification a success.
RGC Updates

Updated PPQ
Several changes have been made to the PPQ, in order to clarify wording and eliminate questions that are no longer required. Changes include:

- Joint Appointment field was removed
- PI % Effort field was removed
- Question #18 (regarding Location) was reworded
- RGC signature line was removed

The updated PPQ is available at:  http://www.ohsu.edu/research/rda/forms.shtml#ap

Please note that the updated PDF version was posted but, due to technical difficulties, the form is not currently fillable. It will be resolved and reposted as soon as possible. In the meantime, please use the Word version. We apologize for the inconvenience.

If you have questions, please contact Carolyn Foster, RGC Operations Manager, at 503-494-5438 or fosterc@ohsu.edu.

RGC Service Survey
In an effort to continually improve the performance and service of Research Grants & Contracts (RGC), RGC has begun distribution of a Service Survey. This survey is emailed to PIs and department contacts (as listed on the PPQ) after signed applications have been returned to the department for submission.

If you receive a survey, we would appreciate your feedback and response. The survey contains 4 questions and should only take a few minutes to complete. Please respond directly to the email (the mailbox name is RGC Feedback).

If you have questions, please contact Carolyn Foster, RGC Operations Manager, at 503-494-5438 or fosterc@ohsu.edu.


Monthly Status/Projections by Project
In the October Fiscal Manager’s Meeting and at the October SPIN Meeting, the OGA Integration Project announced the roll-out of a new report named “Monthly Status/Projections by Project” (which has been casually called the “PI Report”). This report provides a monthly high-level summary of Grant status, including period budget, period expenses, project personnel and projected expenses. The goal of this report is to provide an estimate of the “available balance” at the end of the budget period. A sample of this report along with a detailed description of the data and calculations, as well as instructions for running the report and a list of who to contact if you have questions, will be available on the SPA website soon.

Report Available Now
As of October 24, 2005, the report is available to all Oracle Grants Accounting (OGA) users, for those projects which are currently supported by the report. These include “year-to-year” projects (those with unique project numbers for each budget year, as defined by the sponsor, ending in A, B, C, etc) but exclude those industry-sponsored trials that are event driven (e.g. clinical trials). The group of projects for which the new report is available represents approximately 45% of all non-event-driven projects.

Report Design
Please review the report to determine whether the report will be of value for your monthly budget period reporting. The report is designed to include those items that appear to be handled fairly consistently across the research community. However, the report purposely avoids inclusion of items like projecting monthly supply costs, which is done differently in various business units. At a later date,
downloads of the data provided by the report are scheduled to be available. A spreadsheet very similar to the report will also be offered. This planned spreadsheet would allow additional projections to be included according to the needs of individual Principal Investigators (PI’s). Another download will include access to all the detailed data “behind” the report, thus providing an opportunity to develop alternative, “what-if,” spending scenarios.

Additional information on this exciting offering will be made available during the coming months with a presentation at the School of Medicine (SOM) Department Administrator’s Meeting in November, as well as updates in future AIS and SPIN newsletters.

Any questions or concerns should be addressed to OGA Integration Project Director, Gordon Simpson at x4-5305 or simpsong@ohsu.edu.

OGA Training

Those involved in sponsored projects management are invited to attend Oracle Grants Accounting (OGA) training classes. Classes explain available OGA Reports and demonstrate how to navigate through the OGA system to find extensive award and project information.

Register online at http://ozone.ohsu.edu/ais/training/

### OGA Training Classes

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<tr>
<th>Date</th>
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<tr>
<td>Wednesday, Nov 9</td>
<td>1:00-4:00</td>
<td>BICC 121</td>
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<tr>
<td>Tuesday, Dec 20</td>
<td>1:00-4:00</td>
<td>BICC 122</td>
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Oracle Resources

Remember that the best source of help with Oracle is the Oracle Help Desk, where operators are waiting for your call. Reach the Help Desk at 503-494-4524.

The Help Desk operates from 8:00am - 5:00pm Monday through Friday.

Non-system questions about specific sponsored projects should be addressed to the appropriate SPA Analyst.

Note that due to lack of participation by Oracle Grants Accounting (OGA) users, an OGA Trainer will no longer be available at monthly Oracle Drop-In Sessions in the BICC. However, Sponsored Projects Administration (SPA) remains committed to provided individual help with OGA issues.

Miss the last SPIN Meeting?

Presentations and handouts from previous meetings are available on our website:  
http://www.ohsu.edu/research/rda/spa/spin.shtml

To learn the latest about Oracle at OHSU, visit the Administrative Information Systems (AIS) website:  
http://ozone.ohsu.edu/ais/index.shtml
**Fall 2005 PEP Classes**

Sponsored Projects Administration (SPA) invites pre-registration for the next class in the Fall 2005 Post-award Education Program (PEP) series.

**Clinical Trials**
Tuesday, November 29, 2005
11:00 am - 3:00 pm
SON 358
(pre-registration required)

**Note**
To cover extensive material on this topic, the session is longer than the typical two-hour PEP class. The course session will include a lunch break. (Lunch is not provided.)

**Course Description**
Clinical trial budgets involve many unique issues unlike those found in the budgets for other types of sponsored projects. This session will explore these unique budgeting issues, examine how to deal with them, and explain how to prepare budgets for both industry and non-industry sponsored clinical trials, how to obtain appropriate hospital accounts, and how to deal with clinical trial specific charges and payments. Industry clinical trial post-award topics covered in this course will include understanding what occurs in the setup process, understanding the difference between the awarded amount of the study and the clinical trial budget in OGA, and understanding the purpose and importance of OGA end & close dates. The course explores applying and managing cash; handling invoices; managing expenses and deficits; preparing the project for financial closeout; and setting up and managing post-closing Program Development Accounts (PDA’s).

**PEP Curriculum**
The PEP curriculum includes regularly offered courses on key sponsored project management themes. Taught by experienced SPA personnel, these courses are designed to provide “departmental administrative staff” (including department administrators, division managers, department fiscal managers, department effort coordinators, etc.) with a strong foundation in the essential elements of post-award sponsored project management.

Enrollment in these courses is limited to 25 and pre-registration is required. To register, please reply to this email or contact SPA Education at spaedu@ohsu.edu or 503-494-9063.

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**“Write Winning Grants”**
December 2, 2005 in OHSU Auditorium

The OHSU Clinical Research Program along with the General Clinical Research Center, with support from Pfizer Inc., is sponsoring “Write Winning Grants: A Seminar for Clinician Scientists” on December 2, 2005.

This 8-hour seminar, taking place in the OHSU Auditorium, is geared toward clinicians and scientists who wish to improve their skills in obtaining research grant funds. The seminar will address both the conceptual and practical aspects of grant writing. Registration is required and due by November 18, 2005. Please see our website at [http://www.ohsu.edu/research/crp/crie.shtml](http://www.ohsu.edu/research/crp/crie.shtml) for a brochure, which includes a description, agenda, and registration form.

Please contact Gretchen Luhr at 503-494-3812 with any further questions.

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Please plan to attend the next Sponsored Projects Information Network (SPIN) Meeting:
Thursday, November 17, 2005
9:30am - 10:30am
UHS 8B-60