Office of Research and Sponsored Programs

GRANT Forum
Grant Research Administrators' Network
Team

November 15, 2023

AGENDA

1. **Effort Reporting**
2. **Kuali PD Questionnaire**
   - Streamlined
   - Updates
3. **Forms**
   - F&A
   - SIWE
   - Student Budgeting and Payments
4. **Hands on Demo in Kuali PD**

1. Effort Certification

Effort Certification is Underway!
- Reminder email went out 11/14/2023
- Additional reminders are scheduled for:
  - 11/27/2023, 12/4/2023, 12/11/2023, 12/15/2023
- Period closes on 12/15/2023
- 3 Effort Coordinator training sessions were held

Effort Coordinators
- Keep working with your certifiers to get effort statements certified
- Monitor your Department Dashboards
- Process effort tasks
- Reach out to ecc@umb.edu with any questions!

UMass Boston

2. Kuali PD Questionnaire - Streamlining

New Top Level Questions
- Initial Questionnaire is now simplified
    - Questions are nested under new high level topic questions
    - Less questions to answer for less complex proposals
- New top level questions are:
    - Human and Animal Subjects, Custom Antibodies
    - Hazardous Materials
    - Foreign Components and Activities

Question Numbering
- Questions are now numbered
- Allows for easier referencing during discussions with ORSP and your investigators

Office of Research & Sponsored Programs (ORSP)

UMass Boston

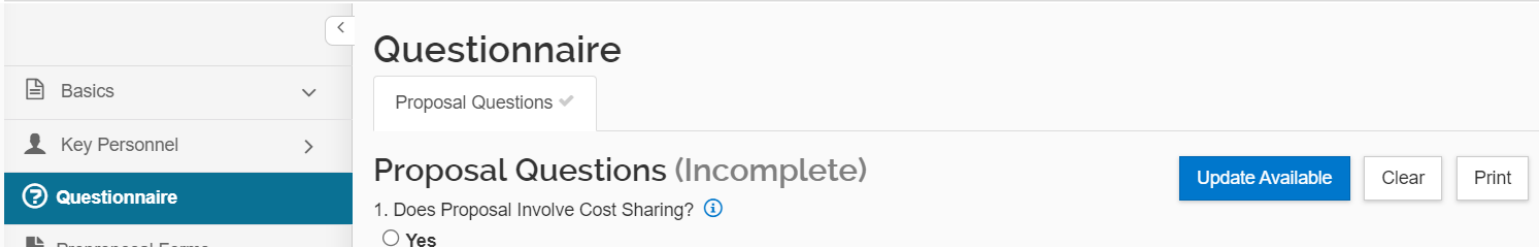## 2. Kuali PD Questionnaire – Updates

Question Updates
- Wording on some questions has been revised
  - Better clarity and alignment with UMB policies and processes
- Agency related questions
  - Not numbered and at bottom of Questionnaire
  - Visibility will be tied to sponsor and prime sponsor on proposal
    - Future state – currently always showing
  - New Agency related question live today:
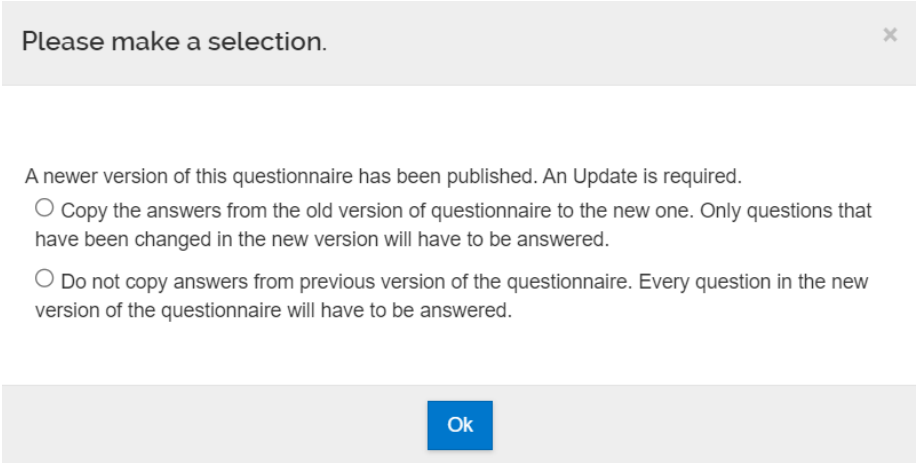   - NSF Safe and Inclusive Work Environment (SIWE)

2. Kuali PD Questionnaire – Updates

Updating Existing Proposals

- Button shows for in process proposals, click the button to pull in these changes

- Please make a selection message, because all questions have been updated, your selection here has no impact, choose either option

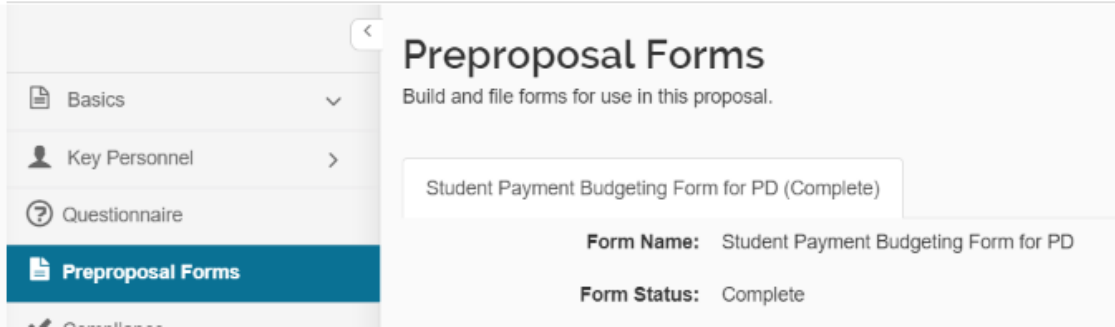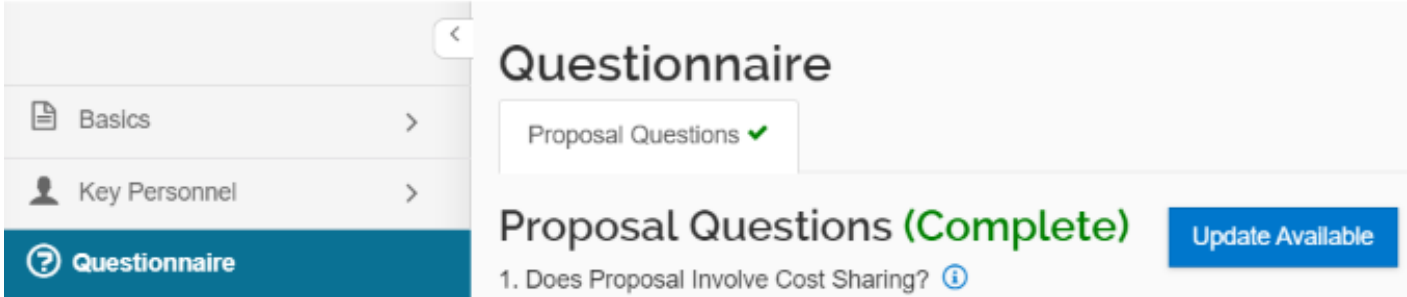UMass Boston

3. Forms

New Forms in Kuali Build
- Launching from Preproposal section of Kuali PD:
  - Indirect Cost Waiver
  - Student Payment Budgeting
  - NSF SIWE
  - Some of these will have versions available to launch from the ORSP website
- Workflow approval routing is built into the forms
- Some forms need to be uploaded to your proposal
  - These will have a PDF of the form attached to your approval confirmation email

Next Up
- Cost Share Approval
- Aiming to launch from Kuali PD January 2024

4. Hands on Demo in Kuali PD

Demo of Questionnaire and New Build Forms

Internal Training Opportunities

Kuali Trainings:
- See Kuali ORSP Webpage

Kuali Proposal Development Approver Training Sessions

Sign up for a 1-hour session using the link below:

Tuesday, January 23 from 3-4 p.m.

Kuali Proposal Development Aggregator (proposal entry) Training Sessions

Sign up for a 2-hour session using the link below:

Monday, January 22 from 2-4 p.m.

Kuali Proposal Development Drop-in Sessions

Click the Zoom link below to join the Drop-in Session:

Thursday, January 25 from 2-3 p.m. - Zoom Link

SUMMIT Trainings:
- See Training & Education ORSP Webpage

SUMMIT for Sponsored Projects Drop-in Sessions

- Wednesday, January 17 from 1-2 p.m. - Zoom Link

SUMMIT for Sponsored Projects Training Sessions - Sign up for a 1-hour session using the link below:

- Wednesday, January 24 at 2 p.m.

UMass Boston

Office of Research & Sponsored Programs (ORSP)

External Training Opportunities

Virtual SRAI
Financial Management Conference
SAVE THE DATE
February 12-16, 2024
Live Learning Online

Financial Research Administration (FRA)
Future Locations and Dates:
March 18 & 19, 2024: Honolulu, HI
March 17 & 18, 2025: San Diego, CA
Link – NCURA Virtual Training

Pre-Award Research Administration (PRA)
Future Locations & Dates:
March 21 & 22, 2024: Honolulu, HI
March 20 & 21, 2025: San Diego, CA

2023 PRIM&R Annual Conference 2023 SBER
Conference
Washington, DC
December 3-6, 2023
Workshops, December 3, 2023

The 2023 Social, Behavioral, and Educational
Research Conference (SBER23) and PRIMR23
Workshops will be held on December 3.

2024 PRIM&R Annual Conference
Seattle, Washington
November 17–20, 2024

UMass
Boston

Office of Research & Sponsored Programs (ORSP)

ORSP Leadership

Matthew Meyer
Associate Vice Provost for Research
and Director of ORSP

Rebecca Hanson
Associate Director of ORSP
Postaward Support Services

Virginia Maki
Assistant Director of ORSP
eRA Systems and Training

Shala Bonyun
Associate Director of ORSP
Preaward Support Services

Tracey Poston, PhD
Associate Director of ORSP
Research Compliance and Integrity

Serena Wang
Research Core Facilities &
Operations Manager of ORSP

UMass
Boston