OSRA Updates
NIH Updates
Final RPPR at Closeout

Now Required - Final Research Performance Progress Report (F-RPPPR)

- Final Progress Report format is retired
- New format similar to annual RPPR
- Requires submission by OSRA
- Required within 120 days from grant end date
NIH Predoctoral Individual Fellowship Deadline (F31)

Past Deadlines

Parent F31:
April, August, December 8th

Diversity F31:
April, August, December 13th

New Deadlines

Parent & Diversity F31:
April, August, December 8th
WRG SP
Access
## Roles and Functionality

<table>
<thead>
<tr>
<th>Role</th>
<th>Proposal Preparation</th>
<th>Budget Preparation</th>
<th>Submit for Routing</th>
<th>Approve Salary Visibility on Budget</th>
<th>Department Financial Approval</th>
<th>Department Head Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Administrator</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Departmental Financial Approver (Salary Manager)</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Department Head</td>
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<td>x</td>
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<tr>
<td>Salary Manager</td>
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</tbody>
</table>

**Optional**
Salary Management

Departmental Designated Salary Manager

Departmental Financial Approver

OPTIONAL Salary Manager

- Select Proposal Administrators
- Staff with access in SAP
- Other Personnel
- None
Functionality and Roles

- Proposal Initiation and Preparation
- Budget
- Salary Management
- Submission for Review
- Department Financial Approval
- Department Head Approval

Departmental Financial Approver
Department Chair Delegate

OSRA RAPID Update 1.9.2017
Functionality and Roles

Proposal Initiation and Preparation
- Proposal Administrator

Budget
- Departmental Financial Approver

Salary Management
- Department Chair

Submission for Review

Department Financial Approval

Department Head Approval
Functionality and Roles

- Proposal Initiation and Preparation
- Budget
- Salary Management
- Submission for Review
- Department Financial Approval
- Department Head Approval

- Proposal Administrator
- Salary Manager
- Departmental Financial Approver
- Department Chair

Weill Cornell Medicine
Proposal Administrators

Anyone involved in proposal preparation and application submission:

- Departmental/Divisional Administrators
- Grants Administrators
- Financial Specialists
- Post Docs
- Graduate Students
- Study Coordinators
- Administrative Assistants
- Research Technicians
## WRG Role Assignment Survey

Add each user and select all roles that apply.
Remember that each user may require multiple roles.

<table>
<thead>
<tr>
<th>Investigator</th>
<th>Sponsored Programs Administrator</th>
<th>Budget Creator</th>
<th>Financial Approver</th>
<th>Salary Manager</th>
<th>Department Head</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Name of User</td>
<td></td>
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</tr>
</tbody>
</table>

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Weill Cornell Medicine

OSRA RAPID Update 1.9.2017
WBS Transaction Management
OSRA Approval of Financial Transactions on Grants

September 1st, 2016

- Petty Cash
- Shopping Carts
- Travel Reimbursement
- Payment Requisitions
## Transaction Metrics

<table>
<thead>
<tr>
<th></th>
<th>Petty Cash</th>
<th>Shopping Cart</th>
<th>Travel*</th>
<th>Payment Requisitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Volume Average</td>
<td>75</td>
<td>250</td>
<td>150</td>
<td>350</td>
</tr>
<tr>
<td>Managed</td>
<td>Email</td>
<td>WBG Universal Worklist</td>
<td>eForms</td>
<td>eForms</td>
</tr>
<tr>
<td>Complexity</td>
<td>Low/Mid</td>
<td>Mid</td>
<td>High</td>
<td>High</td>
</tr>
</tbody>
</table>

*Many travel reimbursement requests come in as Payment Requisitions and Petty Cash Requests (under $400)*
# Transaction Progress Report

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
</table>
| Petty Cash        | • 2 business day turnaround maximum  
                    • Significant reduction in returns due to OSRA follow up             |
| Shopping Cart     | • 2 business day turnaround  
                    • Rarely rejected (i.e. office supplies charged)                      |
| Travel Reimbursement | • 2 business day turnaround  
                         • Timelines lengthened significantly to address issues  
                         • High volume of phone calls/hands on resolution  
                         • Ensure maximum amount allowable charged to grant               |
| Payment Requisitions | • 2 business day turnaround  
                         • Timelines lengthened significantly to address issues  
                         • High volume of phone calls/hands on resolution  
                         • Ensure maximum amount allowable charged to grant            |
Transactions: Major Roadblocks and Issues

1. Unallowable expenses
   - Alcohol, Travel Upgrades, Office Supplies

2. Expenses outside of WBS budget validity date

3. Insufficient funds available in account or GL
   - Sometimes due to delayed carryover

4. Insufficient justification

5. Inconsistent dollar values

6. Missing receipts
Transactions
Management Response

**Critical Needs:**

• Thorough customer service/support
• Compliant processing
• Minimal disruption to business processes
• Minimal disruption to faculty (rejection notices)
• Allocation of maximum expense allowable on grant account
Transactions
Management Response

**Approach:**
- Phone calls/discussion prior to rejection
- Assistance in proper expense allocation
- Education of departments/community
- Updated website information (in process)

**Results:**
- High quality service and efficiency
- Faster processing
Transactions

Future Initiatives

Operational Adjustments under Review:

• Provide updated web resources for training and prospective review
• Eliminate repeat errors
• Central Services alignment
• Modify eForms/Worklist process for returns to go to prior step (the DA) not beginning of process