

**Weill Cornell
Medicine**

OSRA Updates



**Weill Cornell
Medicine**

NIH Updates



Final RPPR at Closeout

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

- 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

**Weill Cornell
Medicine**

WRG SP Access



Roles and Functionality

| | Proposal Preparation | Budget Preparation | Submit for Routing | Approve Salary Visibility on Budget | Department Financial Approval | Department Head Approval |
|--|----------------------|--------------------|--------------------|-------------------------------------|-------------------------------|--------------------------|
| Proposal Administrator | ✗ | ✗ | ✗ | | | |
| Departmental Financial Approver (Salary Manager) | ✗ | ✗ | ✗ | ✗ | ✗ | |
| Department Head | | | | | | ✗ |
| Salary Manager | | | | ✗ | | |
| 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

Functionality and Roles

Proposal Initiation and Preparation

Budget

Salary Management

Submission for Review

Department Financial Approval

Department Head Approval

Proposal Administrator

Departmental Financial Approver

Department Chair

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

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



**Weill Cornell
Medicine**

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

| | Investigator | Sponsored Programs Administrator | | | Budget Creator | | | Financial Approver | | | Salary Manager | | | Department Head | |
|--|-----------------------|----------------------------------|-----------------------|--------------------------|-----------------------|-----------------------|--------------------------|-----------------------|-----------------------|--------------------------|-----------------------|-----------------------|--------------------------|-----------------------|-----------------------|
| | | Entire Department | Specific Division(s) | Specific Investigator(s) | Entire Department | Specific Division(s) | Specific Investigator(s) | Entire Department | Specific Division(s) | Specific Investigator(s) | Entire Department | Specific Division(s) | Specific Investigator(s) | Entire Department | Specific Division(s) |
| Enter Name of User <input type="text"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Enter Name of User <input type="text"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Enter Name of User <input type="text"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

WBS Transaction Management



OSRA Approval of Financial Transactions on Grants

September 1st, 2016

- Petty Cash
- Shopping Carts
- Travel Reimbursement
- Payment Requisitions

Transaction Metrics

| | Petty Cash | Shopping Cart | Travel* | Payment Requisitions |
|------------------------|------------|------------------------|---------|----------------------|
| Monthly Volume Average | 75 | 250 | 150 | 350 |
| Managed | Email | WBG Universal Worklist | eForms | eForms |
| Complexity | Low/Mid | Mid | High | High |

*Many travel reimbursement requests come in as Payment Requisitions and Petty Cash Requests (under \$400)

Transaction Progress Report

| | |
|----------------------|--|
| Petty Cash | <ul style="list-style-type: none">• 2 business day turnaround maximum• Significant reduction in returns due to OSRA follow up |
| Shopping Cart | <ul style="list-style-type: none">• 2 business day turnaround• Rarely rejected (i.e. office supplies charged) |
| Travel Reimbursement | <ul style="list-style-type: none">• 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 | <ul style="list-style-type: none">• 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