

# Research Administrators' Network Meeting

## AGENDA

October 18, 2018

2:00-4:00 p.m.

Michigan League Ballroom

Webcast - <http://orsp.umich.edu/ran-meeting-live-stream>

### Welcome & Introductions [2:00-2:10]

Becky O'Brien, RAAC Communications Subcommittee Chair

Nick Prieur, Guest Emcee

### How Do I Get Involved with Professional Associations? [2:10-2:30]

**NCURA** - Craig Reynolds / Julie Olivero

**SRA** - Ruth Halsey / Amanda Hill

**NORDP** - Jill Jividen / Jennifer Huntington

### RA Professional Development at U of M: [2:30-2:50]

**RAMP** - Chris DeVries / Jan Riggs

**aiM Higher (CRA Study Group)** - Sue Kelch / Kellie Buss

**Navigate** - Melissa Rider / Brenda Vyletel

### Networking: Professional Development Bingo [2:50-3:05]

Meet with U of M folks who are involved with professional organizations

### Updates [3:05-3:55]

**Sponsored Programs** - Debbie Talley, Director, Sponsored Programs [3:05-3:15]

**Office of Research & Sponsored Projects** - Craig Reynolds, Executive Director, ORSP [3:15-3:25]

**ITS** - Cathy Handyside, Assistant Director, eResearch Administration Systems [3:25-3:35]

**Navigate** - David Mulder, Training Manager [3:35-3:40]

**UMOR** - Maternal and Parental Leave Policy [3:40-3:55]

### Closing Remarks [3:55-4:00]

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**RAN schedule for the rest of this Academic Year:**

<http://orsp.umich.edu/ran>

**Ideas for a future meeting?**

Contact [ran-plans@umich.edu](mailto:ran-plans@umich.edu)

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*Brought to you by the Research Administration Advisory Council (RAAC) Communications Subcommittee.*

# Research Administrators' Network

Welcome!

October 18, 2018



# Professional Development Panel

*Professional Associations – NCURA, SRAI, NORDP*  
Research Administrators' Network

October 18, 2018



## National Council of University Research Administrators (NCURA)

- ***Craig Reynolds***, Executive Director, ORSP
- ***Julie Olivero***, Project Representative, ORSP

<http://www.ncura.edu>

## NCURA Upcoming Events

- ***Traveling Workshop***
  - December 12-14, 2018, Savannah, GA
    - Topics include: Fundamentals; Sponsored Project Administration, Financial Research Administration, and Department Research Administration
- ***Financial Research Administration (FRA) Meeting***
  - March 11-12, 2019, Las Vegas, NV (Workshop: March 13, 2019)
- ***Pre-Award Research Administration (PRA) Meeting***
  - March 14-15, 2019, Las Vegas, NV (Workshop: March 13, 2019)

<http://www.ncura.edu>

## Society of Research Administrators International (SRAI)

- ***Ruth Halsey***, Post-Award Financial Manager, Cardiovascular Medicine
- ***Amanda Hill***, Contract & Grant Specialist, U-M Dearborn ORSP

**SAVE THE DATE!**  
**SRA MICHIGAN CHAPTER 2019 MEETING**  
**MACKINAC ISLAND, MICHIGAN**  
**GRAND HOTEL**  
**JUNE 10-11, 2019**



**Celebrating  
25 years  
as a Chapter!**

<http://www.srainternational.org/>

## National Organization of Research Development Professionals (NORDP)

- ***Jill Jividen***, Asst. Director for Research Development, Medical School
- ***Jennifer Huntington***, Research Process Manager, Ross School of Business

<http://www.nordp.org/>



## NORDP Upcoming Event

- ***11th Annual NORDP Research Development Conference***
  - April 29-May 1, 2019, Providence, RI
  - Call for abstracts is open; deadline to submit is November 25, 2018

<http://www.nordp.org/>

# Professional Development Panel

*University of Michigan – RAMP↑, aiM Higher, Navigate*  
Research Administrators' Network

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## Research Administration Mentoring Program (RAMP↑)

- **Chris DeVries**, Project Manager, RAAC
- **Jan Riggs**, Contract & Grant Specialist, Surgery

<http://orsp.umich.edu/ramp>



**RAMP↑**

RESEARCH ADMINISTRATION  
MENTORING PROGRAM

NAVIGATING RESEARCH ADMINISTRATION AT THE UNIVERSITY OF MICHIGAN

## aiM Higher – Certified Research Administrator (CRA) Study Group

- ***Sue Kelch***, Senior Financial Specialist, KHRI
- ***Kellie Buss***, Project Representative, ORSP

<http://orsp.umich.edu/aim-higher>

## Navigate: Professional Development and Training

- ***Melissa Rider***, Research Process Coordinator, LSA
- ***Brenda Vyletel***, Administrative Specialist, COE Climate & Space

<http://orsp.umich.edu/navigate>

# Professional Development Bingo

## Research Administrators' Network

October 18, 2018



# Professional Development Bingo



## Professional Association Key

*Have you participated with one of these groups? Affix correlating sticker(s) to your name tag.*

-  **NCURA** - National Council of University Research Administrators
-  **SRA** - Society of Research Administrators
-  **NORDP** - National Organization of Research Development Professionals
-  **RAMP**<sup>↑</sup> - Research Administration Mentoring Program
-  **aiM Higher** - Study group for Certified Research Administrator (CRA) exam
-  **Navigate** - University of Michigan Professional Development and Training
-  **RAAC** - Research Administration Advisory Council

# Sponsored Programs Update

Research Administrators' Network

**Debbie Talley**, Director, Finance-Sponsored Programs  
October 18, 2018





## FY18 Single Audit update

- No R&D findings noted so far
- Reviewing recharge unit activity
- Plan to complete audit by end of November



# ORSP Update

## Research Administrators' Network

**Craig Reynolds**, Executive Director, ORSP  
October 18, 2018



# Private Sponsors Team Staff Updates



- Patrick Woods promoted to Managing Project Representative
- Emily Baxter promoted to Assistant Managing Project Representative
- Dan Garber promoted to Project Representative
- Lisa Johnson new Assistant Project Representative
- Kate Chie new Assistant Project Representative
- Thomas Paluchniak new Assistant Project Representative

# ORSP Response Time Goals



- Successful partnerships require mutual understanding and shared expectations
- These response times are *goals*, not promises or guarantees.

Respond to status inquiries from PI or designated Administrative Point of Contact	2 to 3 business days
Review a Nondisclosure Agreement and reply as needed	3-5 business days
Review all other agreements and reply with a first revision	10 business days
Review and reply to sponsor comments during negotiations	10 business days
Post a response or otherwise reply to a Requested ORSP Action	2 to 3 business days

# ORSP Response Time Goals



- Sometimes circumstances prevent us from responding quickly:
  - Complex multi-party agreements
  - Issues requiring additional review outside of ORSP
  - Unusually long agreements (e.g. > 20 pages)
  - Delayed sponsor responses
  - Temporarily high workloads
  - Your understanding is always appreciated!
- Please help us help you
  - Always refer to the specific PAF/AWD/UFA in question
  - Designate a single individual to make inquiries
  - Ensure information or documents you provide are complete and accurate
  - Provide (when applicable) *editable* version of agreement and sponsor contact information
  - If you need a faster response, *call* your Project Rep. Explain what's going on and what will happen if ORSP does not respond within time requested.

# eRPM Award Management Tips



1. Compliance related matters must be resolved earlier in the award pipeline
2. There's the difference between "Hold" and "Compliance Hold"
  - a. Hold = follow up with ORSP if you have questions
  - b. Compliance Hold = follow up with IRB, IACUC, COI, etc. if you have questions
3. Use "Request Action/Modification" activity on AWD for post-award issues. If you need help with a post-award issue, don't:
  - a. Post a comment to the PAF
  - b. Request ORSP Action on the PAF
  - c. Post a comment to the AWD
4. Additional information is available in the AWD worksheet that is not visible on the AWD workspace tabs

# Agency Updates



- NIH accepts decimal points for reporting effort on the RPPR (NOT-OD-18-202)
- NSF issuing new sexual harassment policy (News Release 18-082)
- OMB sets micro-purchase threshold at \$10K (same as U-M's bid limit)
- OMB sets simplified acquisition threshold at \$250K (public bidding required)

# New and Updated from ORSP



- Standard Operating Procedures
  - 100.01 Routing Pre-Proposals (PREs) & Proposal Approval Forms (PAFs)
  - 200.03 Reporting of Other Support
  - 300.04 Restoring a Proposal Approval Form (PAF)
  - 400.03 Gift versus Grant Determinations
- Post Award Change Request Form
- RPPR Guidance



# ITS Update

## Research Administrators Network

**Cathy Handyside**, Assistant Director - ITS Research Administration Systems  
October 18, 2018



- Award Management implemented on August 20, 2018!
- Unit Resources
  - Job Aids & Training
  - Details on eRPM Updates
- Future Enhancements Prioritization Process

# Unit Resources



- Job Aids and Training (<http://myumi.ch/6pgnm>)
  - Video-based Presentation with System Demonstrations
  - Step-by-Step Job Aids
  - Frequently Asked Questions
  - eRPM Sandbox
- Details on eRPM Updates - What's New (<http://myumi.ch/JIM92>)
  - System Updates
    - September 10, 2018
    - October 1, 2018
  - Grants.gov SF424 Updates
    - September 2, 2018
    - October 6, 2018

- Future Enhancements Prioritization Process
  - Enhancements List posted on eResearch site (<http://myumi.ch/abGGK>)
  - Gathering feedback from Schools/Colleges/Institutes and Central Offices to determine impact (Low, Medium, and High)
    - Impact Factors:
      - The number of people the change would affect
      - Does it help with efficiency of work?
      - Is there a stoppage of work?
      - Is there an institutional risk involved?
  - Assessing level of effort to implement each request
  - Working with RAAC Executive Committee to prioritize

# Navigate Update

## Research Administrators' Network

**David Mulder**, Training Manager

October 18, 2018



# Navigate Update



## Navigate Professional Development Program



**NAVIGATE**

UNIVERSITY OF MICHIGAN



### Upcoming Classes:

- Uniform Guidance - Nov 13 (Register at [orsp.umich.edu/navigate/uniform-guidance](https://orsp.umich.edu/navigate/uniform-guidance))
- Budgeting Basics - Nov 16, 30 (Apply at [orsp.umich.edu/budgeting-basics](https://orsp.umich.edu/budgeting-basics))
- Advanced Budgeting:
  - Task-Based/Hourly Budgets - Nov 27, Dec 11 ([apply here](#))
  - Internal Proposals - Dec 10, 18 (application coming soon)
- Lunch & Learn - Nov 1 ([waitlist only](#))

For more info, visit [orsp.umich.edu/navigate](https://orsp.umich.edu/navigate) or email [navigate-research@umich.edu](mailto:navigate-research@umich.edu).

## eLearning Modules



- New module(s) released monthly beginning end of October
- First set of modules released:
  - **Pre-Closeout Analysis**
    - Parent Summary, PBSR, Payroll Detail, Voucher Detail
  - **Project Closeout**
    - UG Report, Final Financial Status Report (FSR), Other Common Deliverables
  - **Financial Status Report (FSR) Overview**
    - Mini-module focused exclusively on Final FSR (same content as Project Closeout module)

# Updated Leave Policies & Sponsored Funding

Research Administrators Network

**Bekah Ashley**, Director of Human Resources, UMOR

**Becky O'Brien**, Director of Research Administration, School of Information

October 18, 2018





# What is New?



**To support faculty and staff who welcome children by birth, adoption, foster care, or legal guardianship:**

- Maternity Leave
- Parental Leave

# What is New?



## Maternity Leave

- Up to 6 weeks of paid time off to recover from childbirth
- Available to birth mothers
- 6 weeks consecutively from the time of birth

# What is New?



## Parental Leave

- Up to 6 weeks of paid time off to bond with new child
- Available to birth mothers (in addition to maternity leave), fathers, and other parents (includes adoption, foster parenting, and legal guardianship)
- 6 weeks can be used consecutively or in separate increments for up to a year after the event

# Considerations / Planning Ahead



1. **Schedule Leave** - Work with supervisor & unit regarding when/how to schedule leave
  - a. Michigan Medicine, Medical School, Flint, & Dearborn, you must work with your unit HR office
2. **Notify Work Connections** - For any leave (medical) people paid on sponsored funds are required to go through Work Connections
3. **Notify Sponsor and Obtain Prior Approval** - The Principal Investigator may need to contact sponsor which may have requirements to notify them or seek their approval for a change in plans related to a leave.
  - a. Typically sponsors want notification/seek their approval for reducing planned effort by >25% or being away from the project for > 3 months for key personnel and possibly complete a Post-Award Change Request (PACR)
4. **Secure Reimbursement** - UMOR can reimburse your unit with funds from UMOR Pool account. Here's how:

# Reimbursement to Unit from UMOR Pool



## Time & Labor Employees (**DO** fill out timesheets in MPathways)

Reimbursement process automatically started by using the proper time reporting code

- MRL - Maternity Leave
- PRL - Parental Leave

A screenshot of the MPathways timesheet interface. It shows a table with columns for dates (Mon 10/29, Tue 10/30, Wed 10/31), a Total column, a Time Reporting Code dropdown menu, a Type column, and a Comb column. The dropdown menu is open, showing options: VAC - Vacation, ~~SCL - Sick, Illness/Injury~~, MRL - Maternity Leave, and PRL - Parental Leave. The last two options are highlighted in yellow. A blue pause button is visible on the left side of the table.

Mon 10/29	Tue 10/30	Wed 10/31	Total	Time Reporting Code	Type	Comb
				VAC - Vacation		
				<del>SCL - Sick, Illness/Injury</del>		
				MRL - Maternity Leave		
				PRL - Parental Leave		

*UMOR Pool covers employees with effort on 20000 or 25000*



# Reimbursement to Unit from UMOR Pool

## Faculty & Postdocs Not on Time & Labor (aka **DO NOT** fill out timesheets in MPathways)

Must Submit Reimbursement Request Form

- **Faculty** Extended Sick, Maternity Leave, and/or Parental Leave Salary Transfer Request
- **Research Fellow** Extended Sick, Maternity Leave, and/or Parental Leave Salary Transfer Request

*UMOR Pool covers employees with effort on 20000 or 25000*

# Online Resources (1 of 3)



## Guide to Time Off Options for New Parents

New parents at U-M can take advantage of a number of paid and unpaid time off options to recover from childbirth and to care for a child following birth or placement for adoption, foster care or legal guardianship. As of September 1, 2018, these include paid maternity (childbirth) and parental leaves. Some options must be granted at the faculty or staff member's request and others are discretionary. While the chart below does not specifically include vacation time and Paid Time Off (PTO), eligible individuals may request to use these types of paid time to care for or bond with a new child.

Type of Time Off	Pay Status	Intended Use	Eligibility <sup>1</sup>	Availability	Duration	Scheduling Subject to Approval?	Policy Reference	Notes
Maternity (Childbirth) Leave	Paid	Recovery from childbirth	<ul style="list-style-type: none"><li>Regular faculty<sup>2</sup></li><li>Regular campus<sup>3</sup> and Medical School staff with at least a 20% appointment</li><li>Regular hospital and health center staff with at least a 50% appointment</li><li>Postdoctoral research fellows<sup>4</sup></li></ul>	Upon hire	Up to 6 weeks (240 hrs with a full-time appointment)	No	SPG 201.30-6	Must be taken as a single block of time immediately after childbirth
Parental Leave	Paid	Bonding with a new child		Birth or placement must take place after employee completes 6 months of service	Up to 6 weeks (240 hrs with a full-time appointment)	Yes	SPG 201.30-6	Must be used within 12 months of birth or placement for adoption, foster care or legal guardianship; may only be used once every 12 months for foster care and legal guardianship; faculty may use in lieu of modified duties
Extended Sick Time	Paid	Prenatal care, recovery from childbirth	<ul style="list-style-type: none"><li>Faculty</li><li>Staff</li></ul>	After 1 year of service	Up to 1 year	No	SPG 201.11-0 (staff)	May be used to extend maternity leave in the event of complicated delivery or c-section
Short-Term Sick Time	Paid	Prenatal care, recovery from childbirth or care for a new child	<ul style="list-style-type: none"><li>Faculty</li><li>Staff who are not eligible for parental leave (except PTO-eligible staff)</li></ul>	Upon hire	Up to 15 days	No	SPG 201.11-1 (faculty) Michigan Medicine PTO policy	For those not eligible for parental leave, may be used to bond with a new child within 1 year of the child's birth or arrival in the home

<sup>1</sup>Faculty and staff covered by a collective bargaining agreement should consult their contract regarding eligibility for leave benefits. <sup>2</sup>Includes Ann Arbor, Flint and Dearborn.

<sup>3</sup>Non-instructional faculty must have at least a 20% appointment for parental leave but do not require a minimum appointment for maternity leave.

<sup>4</sup>Eligibility for postdoctoral research fellows is subject to the rules of the sponsor or grant.

HR provides a handy matrix to let you know who is eligible and what is covered.

This has links to the Standard Practice Guide (SPG) sections so you can reference the full policy.

<https://hr.umich.edu/working-u-m/my-employment/leaves-absence/maternity-childbirth-parental-leave>

# Online Resources (2 of 3)



The screenshot shows the ORSP website with a navigation bar at the top containing links like 'Office of Research', 'UMOR Units', 'Research & Sponsored Projects', 'Research Ethics & Compliance', and 'eResearch'. Below this is a header for 'RESEARCH AND SPONSORED PROJECTS' with a sub-header 'UNIVERSITY OF MICHIGAN'. A secondary navigation bar includes links such as 'ABOUT ORSP', 'FIND FUNDING', 'DEVELOP PROPOSAL', 'ROUTE & SUBMIT PROPOSAL', 'SET UP PROJECT', 'MANAGE PROJECT', 'CLOSE OUT PROJECT', 'TOOLS & RESOURCES', and 'POLICIES & PROCEDURES'. The main content area is titled 'Extended Sick Time Pay & Leave and Paid Parental Leaves'. It includes a 'MENU' on the left, a 'YOU ARE HERE' breadcrumb trail, and a 'PROJECT LIFECYCLE' diagram. The text explains that the U-M Office of Research (UMOR) provides internal funds for extended sick time pay and leave for employees paid from sponsored funds. It also mentions that charges related to extended sick time pay (staff and faculty) and extended leave (research fellows) are not allowable expenses on sponsored funds. A section titled 'FOR EMPLOYEES PAID FROM SPONSORED FUNDS' states that charges related to extended sick time pay (staff and faculty), extended leave (research fellows) and Maternity and Parental Leaves (staff, faculty, and research fellows) are typically not allowable expenses on sponsored funds. The University maintains a central fund to cover these charges. Note this is not applicable to individuals appointed to the Non-Instructional Sponsored Pool Account. A section titled '1. Eligibility Requirements' states that the qualifying illness/injury or pregnancy must be communicated by the University's Work Connections program, which provides authorization forms and confidential management of the event/condition while verifying the qualifying medical disability. Work Connections will verify the qualifying medical disability, expected duration of absence, and any work

**Extended Sick Time Pay & Leave and Paid Parental Leaves**

The U-M Office of Research (UMOR) provides internal funds for extended sick time pay and leave for employees paid from sponsored funds. Charges related to Extended Sick Time Pay (staff and faculty) and Extended Leave (research fellows) are **not** allowable expenses on sponsored funds. The University maintains a central fund to cover these charges.

**FOR EMPLOYEES PAID FROM SPONSORED FUNDS**

Charges related to Extended Sick Time Pay (staff and faculty), Extended Leave (research fellows) and Maternity and Parental Leaves (staff, faculty, and research fellows) are typically not allowable expenses on sponsored funds. The University maintains a central fund to cover these charges. Note this is not applicable to individuals appointed to the Non-Instructional Sponsored Pool Account.

**1. Eligibility Requirements**

The qualifying illness/injury or pregnancy must be communicated by the University's Work Connections program, which provides authorization forms and confidential management of the event/condition while verifying the qualifying medical disability.

Work Connections will verify the qualifying medical disability, expected duration of absence, and any work

**IMPORTANT NOTE**

The University of Michigan (U-M) has policies in place for paid maternity and parental leaves as of September 1, 2018. Please visit the [HR website](#) and [SPG 201.30-6](#) for more information on these policies and related HR processes.

This Extended Leave page outlines the steps that must be taken by faculty, staff, postdocs, and research fellows who request a leave while paid by sponsored funds (codes 20000 and 25000).

**YOU ARE HERE:**

Home / Manage Project / Extended Sick Time Pay & Leave and Paid Parental Leaves

**PROJECT LIFECYCLE**

Research Ethics & Compliance

**RELATED INFORMATION**

**RESEARCH ADMINISTRATION DAY ON TUESDAY, SEPTEMBER 25!**

ORSP will close from 3:00 p.m. to 4:30 p.m. on Tuesday, September 25, 2018, to allow our employees to celebrate Research Administrators' Day. If a critical issue arises during this time, you may call the main phone number (734) 764-5500, which will forward to a private cell phone.

Do take some time out to recognize the research administrators that you work with, who manage the complex business, financial, and

ORSP's website outlines what must happen for *any* extended leave for faculty, staff, postdocs, and research fellows who request a leave while paid by sponsored funds (codes 20000 and 25000).

We link to all other related online resources to guide you.

<https://orsp.umich.edu/extended-leave>



# Online Resources (3 of 3)



FINANCE  
UNIVERSITY OF MICHIGAN

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Q

## Salary Transfers

Home / Financial Operations / Payroll / Forms and Tables / Salary Transfers

### Salary Transfers

Salary Transfers are transactions that impact expenses for salary and the related university contribution for benefits and taxes.

#### Retroactive Salary Transfers

A retroactive salary transfer is initiated when a ShortCode for a faculty or staff member's salary is changed retroactively. This means that one ShortCode was charged for salary/benefits/taxes and the expense should now be charged to another ShortCode.

Many salary transfers result from retroactive Department Budget Earnings transactions being processed by a HR departmental representative. However, some salary transfers can be initiated by submitting the attached Request for Salary Transfer form to the University Payroll Office.

#### Proration Rules

Some salary transfers result from proration rules for University-year appointments. [Click here for University Year \(U-Year\) Appointment Information](#)

» Print Friendly

### Resources

Request For Salary Transfer

Research Fellow Extended Sick, Maternity Leave and/or Parental Leave Salary Transfer Request

Faculty Extended Sick, Maternity Leave and/or Parental Leave Salary Transfer Request

Instructions for Extended Sick and Paid Parental Leaves Transfer Requests

Retroactive Salary Transfers

Standard Practice Guide 501.09: Policy on Retroactive Salary Distribution Chang...

### News

2018 Tax Changes

Payroll Cutoffs/Deadlines/Paydate Calendar

PAYROLL  
UNIVERSITY OF MICHIGAN

3395 Wolverine Tower, 3003 South State Street  
Ann Arbor, Michigan 48109-1279

Fax: (734) 647-3983

## TM

### REQUEST FOR SALARY TRANSFER

DATE:

TO: Payroll Analyst – Salary Transfers

FROM: Name:

Department:  Phone Number:

**NOTE:** This form should be used **ONLY** for salary transfers to correct ShortCodes for normal prior period adjustments entered into the Timesheet page. Department Budget Earnings changes should be processed for all other salary transfers.

Employee Name

UMID  Empl Rcd#

Pay Date

Employee Signature

Earnings Code	Amount \$	FROM ShortCode	TO ShortCode
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Reason for salary transfer:

Other Information:

SalTrans.doc, 4/17/14

Payroll, on the Finance website, provides the forms you will need for Salary Transfer.

(This is only for those NOT in the Time & Labor system)

<http://www.finance.umich.edu/finops/payroll/forms/salarytransfers>

# Closing Remarks



- Thanks to the RAAC Communications Subcommittee!
- Ideas for a future meeting? [ran-plans@umich.edu](mailto:ran-plans@umich.edu)
- Next RAN meeting:
  - February 26, 2019
  - 2:00 – 4:00 pm
  - Michigan League Ballroom