Office of Research and Sponsored Programs

GRANT Forum
Grant Research Administrators' Network
Team

June 21, 2023

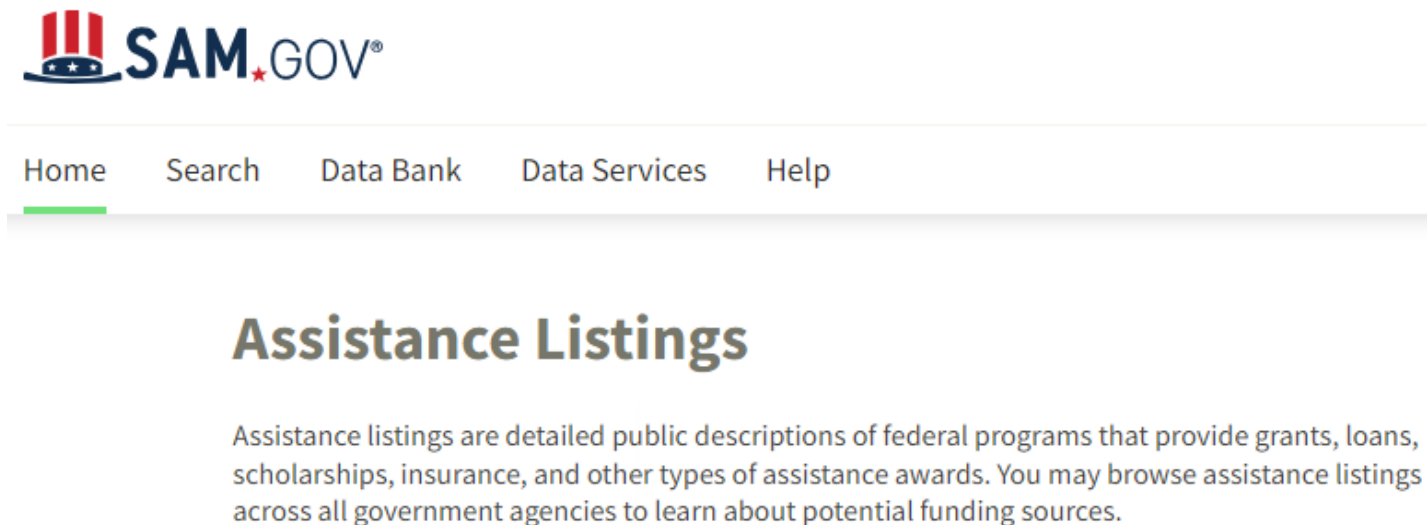OFFICE OF RESEARCH AND SPONSORED PROGRAMS

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AGENDA

1. Kuali Updates
   - CFDA is now ALN
2. Kuali Build Forms Going Live
   - Demo Launching Forms from Kuali PD
   - Future Forms (F&A, Cost-Share, At-Risk)
3. Authorized Signatory
4. Future Forum Topics
   - Student Payments – Future
   - ORSP Workbook – Future

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1. Kuali Update

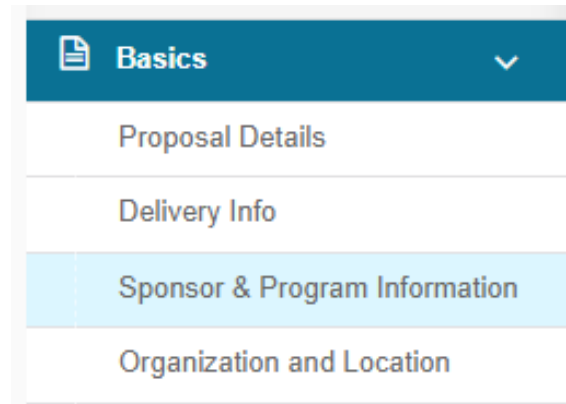## Field Name Change – CFDA is Now ALN

- The Federal Government now uses ALN – Assistance Listing Number in place of CFDA – Catalog of Federal Domestic Assistance
- Kuali has updated all references of CFDA to ALN as of 6/16/2023
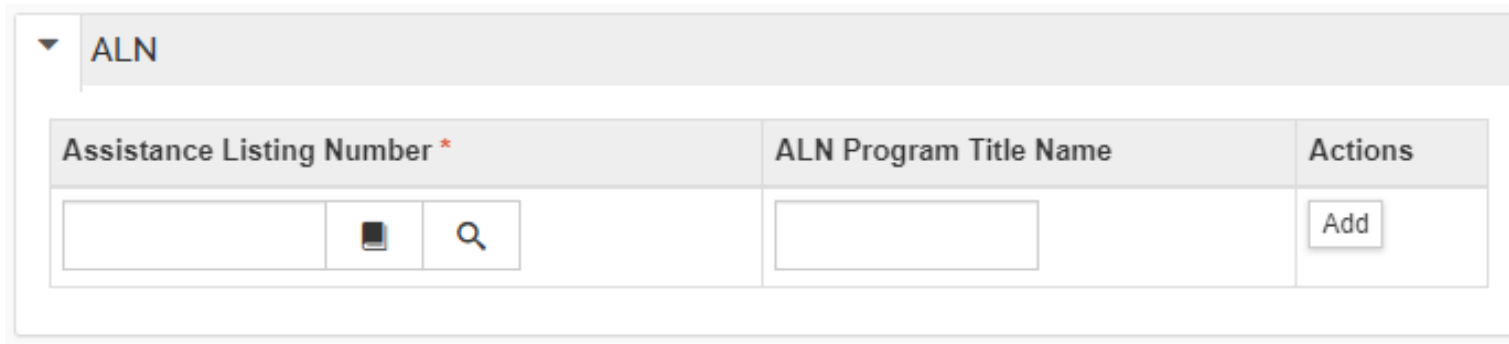- UMB Kuali Guides have been updated

SAM.GOV®

Home   Search   Data Bank   Data Services   Help

Assistance Listings

Assistance listings are detailed public descriptions of federal programs that provide grants, loans, scholarships, insurance, and other types of assistance awards. You may browse assistance listings across all government agencies to learn about potential funding sources.

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1. Kuali Update

Field Name Change – CFDA is Now ALN

- ALN is captured in Sponsor & Program Information within the Basics section of Kuali PD

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2. Kuali Build Forms Live in PD

Kuali Build – Overview

- Build is Kuali's forms tool that integrates with Kuali Proposal Development (PD)
- Custom forms that can be launched directly from Kuali PD
- Forms include electronic workflow and approval routing
- New Sponsor and Organization requests are available in PD now
- UMB Kuali Guides have been updated
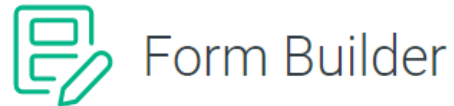
2. Kuali Build Forms Live in PD

Kuali Build – Launches from Preproposal Forms Section in PD

Kuali Build – Demo

- Demonstration of how to launch and complete these forms from Kuali PD

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2. Kuali Build – Future Forms

Proposal Development
- Cost Share Approval – Draft
- F&A Waiver – Draft
- Limited Submission
- Participation Agreement - Planning

System Maintenance
- Kuali Approver & Aggregator Add/Update
- Effort Coordinator Add/Update
- New Sponsor Request – Now Live
- New Organization Request – Now Live

Award Management
- Course Buyout - Draft
- At Risk for Advance Accounts – Draft
- Project Specific Authorized Signatories
- NCE's – Draft
- Budget Modifications
- Key Personnel Changes
- Award Closeout

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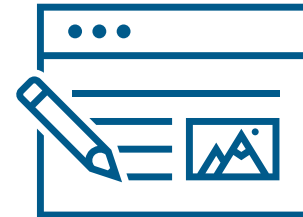
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What forms are You interested in?

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3. Sponsored Award Authorized Signature Policy

Required by UMass Internal Control Plan

Unit/Department level standing authorized signatories
- **Authority is role based, not person based**
  - **May designate specific types of transactions**
  - **Automatically transfers to new role/title holder**
- **Department Head is responsible for updating at least annually**

Project specific additional signatories (optional)
- **Cannot be used to remove signatories**

Replaces these old forms:
- **Request for New Project/Grant**
- **Authorized Signature Form**

DUE
NEXT FRIDAY
June 30th, 2023

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University of Massachusetts Boston
ORSP Signature Authorization Form
Fiscal Year 2023

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Unit ID:	B9XXXXXXXX	Unit Description:	XXXXXXXXXXXXXXXXXXXX	Dean/VC:	Last Name, First Name
Dept ID:	BXXXXYYOOO	Dept Description:	XXXXXXXXXXXXXXXXXXXX	Department Head:	Last Name, First Name

The following individuals are authorized to sign the transactions specified on this form for all department sponsored awards. Sponsored awards are all funding sources falling under the purview of the Office of Research & Sponsored Programs. Internal funding sources within the University are subject to the Administration & Finance Signature Authorization process.

Role	Title	Name of Authorized Signer	Signature of Authorized Signer	Transactions Authorized	Note
Dean's Office	All	All	All	ALL	Dean's Office signatories are also authorized signatories for all departments within the Unit.
Department Chair					
Grant Administrator					
Business Manager					
Graduate Studies	Director of Financial Management for Research & Grad Studies	Paul Mullane		HRP	Graduate Student payroll only (as per UMB policy)
Graduate Studies	Assistant Director of Financial Management for Research & Grad Studies	Simon Haile		HRP	Graduate Student payroll only (as per UMB policy)

* Should an authorized signatory change due to personnel changes, the new Title holder will be accepted as the authorized signatory until such time as this form is updated. It is the Department Head's responsibility to ensure this form is updated in a timely manner.

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Signatures authorizing a department's legal obligations, contracts, payments, payroll and other fiscal transactions shall be interpreted as certification that the document upon which the signature appears, and any attachments, are accurate and complete and comply with all applicable general and special laws and regulations, including sponsor requirements.

*TA = Transactions Authorized

Legend of Transactions Authorized

ALL - All Transactions	EXP - Non-Payroll Expenditure Documents
PROP - Proposal Approvers	RTF - RTF Authorization
BUD - Budget Submissions	ECC - Effort Certification
HRP - HR & Payroll Documents	

Department Head Signature   Date

Dean or Vice Chancellor Signature   Date

Print Dean or Vice Chancellor Name   Date

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ORSP Training Opportunities

Kuali Proposal Development (PD) Training

ORSP Website: https://www.umb.edu/orsp/kuali_research

Kuali Proposal Development Approver Training Sessions

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

» Thursday 6/29/2023 from 4 - 5

Kuali Proposal Development Aggregator (proposal entry) Training Sessions

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

» Wendesday 6/28/2023 from 10 - 12

Kuali Proposal Development Drop-in Sessions

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

» July 21, 2023 from 11-12 Zoom Link

To schedule group or one on one trainings, contact: Virginia.Maki@umb.edu

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ORSP Training Opportunities

SUMMIT for Sponsored Programs Training

ORSP Website: https://www.umb.edu/orsp/training

SUMMIT for Sponsored Projects Drop-in Sessions

» Thursday 7/20/2023 from 1 - 2 - **Zoom Link**

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

» Wednesday 6/28/2023 at 4 PM
» Wednesday 8/30/2023 at 4 PM

To schedule group or one on one trainings, contact: Virginia.Maki@umb.edu

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External Training Opportunities

NCURA: Departmental Research Administration
June 26-29

NCURA Annual Meeting
August 6-9, 2023 - Registration open will open April 2023!

SRA Annual Meeting
October 14-18 - Seattle Pre-Conference Training 14-16

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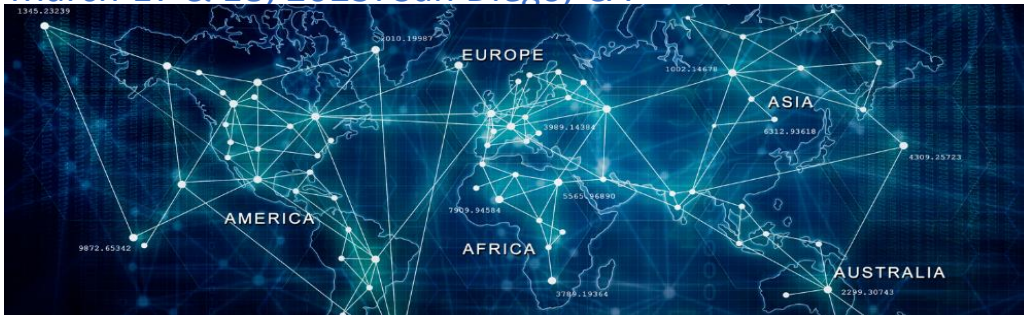March 21 & 22, 2024: Honolulu, HI
March 20 & 21, 2025: San Diego, CA

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

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Next Grant Forum: July 19, 2023

Future Topics
- ORSP Workbook
- Award Set Up
- Student Payments

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

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4. Future Forum Topics

Student Payments

- Working Group to Document Process
  - Determination of Relationship
  - Payment Route
  - Required Backup Documentation
- Issue Resolution Meetings
  - Financial Aid
  - Controller's Office/Bursar
- FAQ Development
  - QUESTIONS NEEDED