







# Research Administration Brown Bag Series

September 2019



-  **Funding Agency Updates**
-  **NU-RES Updates**
-  **NU-RES Finance Staffing Updates**
-  **Year End Process for PO Liquidations**
-  **Looking ahead**
-  **College to College: Close out best practices**

## Funding Agency Updates

- <https://nexus.od.nih.gov/all/2019/09/04/dont-forget-to-link-your-orcid-id-to-your-era-commons-profile/>
- Starting October 1, 2019, ORCID identifiers will be **required** for individuals supported by institutional research training, career development, and other research education awards.
- xTrain appointments will not be accepted for agency review if potential appointees do not have an ORCID iD linked to their eRA personal profile.
- ORCID iDs will also be required for PD/PIs on individual fellowship and career development applications submitted for due dates on or after January 25, 2020.

## NU-RES Updates

- New website is live!
  - Please let us know if you are finding things or not
  - Will host an updated site overview next month
  - New and improved contacts page with 3 different views
  - Feedback on Contacts page (anonymous or identifiable, you decide)

## NU-RES Updates

- <https://research.northeastern.edu/nu-res/compliance/nsf-compliance/nsf-training/>
  - The NSF training is beginning again in October;
  - Live training dates have been posted to the website and;
  - Relevant employees are invited to sign up!

## NU-RES Updates

- University-wide [RCR training sessions](#) are available for the fall
  - Grad students, post docs and fellows may want to consider
  - Fulfills requirements for those paid off F, T and K NIH awards
  - Others may not need, but want to take the course, they are welcome to join
- Office hours are starting this week!
  - Will be Tuesday (I-SEC) and Thursday (Cabot) each week (see the [calendar](#))
  - No sign up needed
  - Come or send faculty
  - Can review specific transactions, ask for training or review processes with NU-RES

## NU-RES Updates

- Other support expectations are under review at several agencies
- We will provide revised instructions when they are formalized by the agencies
- Please be sure to include NU internal seed funding
- With eCD, faculty now have the ability to revise their other activities throughout the year rather than having to wait, encourage them to keep that updated
- eCD also has the ability for faculty to send a question to the compliance team through the application if they are not sure whether or not to disclose

## NU-RES Updates

- Retirement of Tony Rufo, Senior Grant Officer
- We will miss Tony!
- Thank you Tony for all your work, support and knowledge
- More information on celebrating Tony will be forthcoming



# NU-RES Finance Staff Updates

## Sponsored Account Analyst

Morgan Fielding  
Rebecca Jackson  
Mai Nguyen

### **Major R&R:**

Financial Reporting  
Expense Reimbursements  
JV's/Dpays/PO Reqs  
Banner Set ups and changes  
Closeouts

## Research Account Analyst

Linda Carfagna  
Kruti Desai  
Jose Hernandez

### **Major R&R:**

Invoicing / Draw Downs  
Portal Invoice Submissions  
Collections / Open AR Aging  
Banner Billing Schedule set ups and changes  
Quarterly PMS Reporting

## Additional Research Financial Compliance and Support

Fred Cromp: PDCs, Off-Contract Comp, HR Action, Effort Certs  
Stacey Cugini: Concur  
Teddy Beaudet: In-coming Subcontract Invoices

# Year-End Process for PO Liquidations

- **Fiscal Year-End Roll Process**
  - PO Commitments must be rolled forward at the end of each fiscal year
  - Delivered Banner process uses the Fund Termination Date as a default cutoff
  - If your Fund has a Termination Date  $\leq$  06/30/20xx it will not be included in the roll process
- **NU-RES Finance Solution**
  - Manually extend the Termination Date of any Fund dated 01/01/20xx or later to 07/31/20xx in order to roll forward Funds that may be receiving extensions

# Year-End Process for PO Liquidations

- **Department-Level Intervention**
  - Liquidate completed/unused POs in a timely fashion
  - Communicate with NU-RES Finance ASAP if delays/issues are anticipated
- **If your PO was not included in the roll process...**
  - Don't panic!
  - If the PO only needs to be liquidated: NU-RES will close the award as-is. The Commitment has no effect on the GL/receivable balance and is only cosmetic
  - If the PO needs to be charged: send an email to your Sponsored Account Analyst and Procurement

## Year ahead

October:

Closeout Process

FDP report out

November:

What do you want to see?

Legislative updates? ITS security? Human subjects review?

## **Year ahead**

Please contact us with suggestions for the NU-RES Brown Bags

# College to College

- Best practices sharing session on close out
- Please share what your college does
- Opportunity to seek feedback, share tools
- NU-RES is here to answer questions about our role in the process