From the Director’s Office

UH ended its fiscal year 2008 with a grand total of $362M awarded. Congratulation to the PIs who received the awards; and thank you to the FOs, research administrators, and ORS staff for their dedicated service and support.

With the extensive recruitment efforts made throughout the past year, especially in the ORS Projects Fiscal Accounting and Projects Financial Services Sections, ORS is proud to say that we are near being fully staffed. This has brought ORS up to date with invoicing and reporting on active project accounts. We have also strengthened our collection and close out efforts with newly implemented policies and procedures.

As of January 2008, our new Access database, which replaced the Excel invoicing log, has provided us with the capability to track invoices, payments, prepare aging reports, and follow-up on collections like we’ve never done before.

We truly appreciate your patience as we continue our efforts to enhance ORS’ services to you.

Happy Discovery!

Yaa-Yin Fong
Director

Coming Soon! Enhanced tracking and reporting services - InfoEd Update

Our goal is to provide you with better service and with that, InfoEd - our new Proposal Tracking (PT) Module is projected to go live on September 1, 2008.

InfoEd provides unsurpassed capabilities to manage and track proposals as they move through the various stages from submission through closeout. Some enhancements you can look forward to include:

- The ability to capture Form 5 data electronically.
- The automated alert notifications to monitor project deliverable and other critical dates requiring action.
- Robust reporting capability.

For more information, contact: Carol Santucci, InfoEd Project Manager at 956-3876.
**Form changes to know -**

**Form 5 Modifications to Coincide with InfoEd Conversion**

Effective September 1, the following Form 5 fields will be modified and available on-line:

1) Proposal Deadline

**OLD FIELD**

```
A. Proposal Deadline

Pick-up Date: Electronic Submission by: Open

Proposal Deadline: Choose one... 5/1/08
```

**NEW FIELD**

```
Deadline Date

Deadline Type

Project Title

New Proposal for Carol
```

2) Proposed Activity - Additional activities have been added to provide researchers more options to better describe the type of activity being performed.

**OLD FIELD**

```
Proposed Activity: Choose one...

1st Year
Current Cum
Continuations
Revised Cum
```

**NEW FIELD**

```
Program Type

Non-research
```

3) Proposal Type

**OLD FIELD**

```
This is a Proposal Prime for

Choose one...

Proposal
```

**NEW FIELD**

```
Proposal Type

New Proposal
```

4) Indirect Cost Base - Additional Indirect Cost Base Types have been added for reporting purposes:

**OLD FIELD**

```
Indirect Cost Base:

Choose one...

01 SALARIES & WAGES
02 SALARIES, WAGES & FRINGE
10 TOTAL DIRECT COSTS
11 TDC LESS TUITION & EQUIPMENT
12 TDC LESS SCHL/STIP/ALLOW
13 TDC LESS SAL, WAGES & FRINGE
14 TDC LESS TUITION/FELLOWSHIPS
15 TDC LESS STIP/ALLOW/EQUIP
16 TDC LESS TUIT/STIP/ALLOW/EQUIP
```

**NEW FIELD**

```
F&A Base

Comments/Attach

Comments

1. Proposal incl
2. Proposal incl
```

For more information, contact: Carol Santucci, InfoEd Project Manager at 956-3876.
**Working together - Project Closeout Procedure**

As ORS strengthens its efforts to meet the closeout requirements in accordance with APM A8.954, Extramural Close Out Procedures, we ask for FO/PI assistance with:

1. Clearing all suspense items and encumbrances.
2. Submit the certified cost sharing report, if applicable.

As a reminder, if notification for account closeout is not provided by the timeline noted in Section 5(4) of APM A8.954, the ORS accountant will invoice or report on the actual expenditures in FMIS at the time it was prepared.

*For more information, contact: Joanne Yama, Projects Financial Services Manager at 956-8163*

**Indirect Overhead (F&A) Waivers & Reductions**

As a reminder, if the Indirect Cost Rate is other than the currently established rate, please attach copy of agency limitations or proof of waiver from the appropriate Chancellor’s office when submitting proposals to ORS. Thank you for your cooperation.

**Forthcoming Proposals Notifications**

Thank you PIs, for your continued support in providing advance notice of proposals to be submitted to ORS for review and endorsement. This allows ORS to provide you with better service in preparing for any increase in volume of submissions.

Advance notification of proposal submissions should be emailed to: erahelpdesk@ors.hawaii.edu

Please include the following:

1) PI Contact Info.
2) PI’s Campus and School
3) Sponsor Info.
4) Submission Deadline
5) Project Type (e.g., research & development, training, other)

*For more information, contact: ORS Helpdesk at 956-5198 or email: erahelpdesk@ors.hawaii.edu*
Projects Fiscal Accounting Section Realignment

ORS Projects Fiscal Accounting Section is now aligned by Sponsors to better serve FO/PI and allow our accountants to gain in-depth knowledge and provide you with better Sponsor specific service/reports. We have divided into 4 teams with one team leader per team:

Team 1: Sponsors Alpha: A-D
Team 2: Sponsors Alpha: E-J (Excludes Health/Health & Human Svc Dept)
Team 3: Sponsors Alpha: K-N and Health/Health & Human Svc Dept (Excludes National)
Team 4: Sponsors Alpha: O-Z and National

View the chart on the ORS web site and click on Staff Directory.

For more information, contact:

Janis Morita, Projects Fiscal Accounting Manager at 956-6959.

Now open for enrollment - Contracts and Grants Certification Program (For AO/FO and Research Administrative Staff)

ORS is proud to provide continuing educational programs that assist in better understanding the contract and grants submission process. This certification program covers: proposal and contract preparation, research compliance issues, budgeting, cost sharing, indirect cost returns, program income, electronic tools and post-award management and reporting.

The certification program is comprised of 6 modules that are held at Manoa campus’ Kuykendall 201 and also broadcasted live to the following locations: Kapiolani CC, Kauai CC, Leeward CC, Maui CC, Molokai Education Center, and UH Hilo.

Registration deadline is Friday, August 22, 2008.

For more information, visit us at the ORS web site and click on Training.

For Researchers - On-line training available for New Principal Investigators or Transferring Principal Investigators New to the UH System

Are you new to UH or a new PI? Take this on-line training course at your leisure to get a better understanding of what your role is, who’s waiting to support you, obtain insightful information on the Contracts and Grants Management process, and learn about other useful resources available to you.

For more information, visit us at the ORS web site and click on Training.
ORS Helpdesk is here to help you! - Frequently Asked Questions -

1. Do I (PI) need to register with Grants.gov?

ORS is the overall UH representative registered with Grants.gov. PIs only need to complete their application package using Adobe Acrobat/Reader or Pure Edge viewer program and upload any supporting files to the ORS Web site. For more information, go to Grants.gov and click on Help – Download Software

2. I am not able to locate the application package in Grants.gov. Where can I find it?

If the RFP specifies that the proposal has to be submitted through Grants.gov then the package should be available in Grants.gov. Use the Funding Opportunity Number or any of the other search options to locate the application package. If you encounter a problem locating the application package/RFP contact your respective funding agency’s program officer and ask for the direct link, funding opportunity number, CFDA (Catalog of Federal Domestic Assistance) number, or the title of the grant.

3. I would like to incorporate a three-year budget into a Grants.gov application but cannot access any years beyond the first.

You need to enter data into all required fields (yellow) of the first year before the “Next Period” button will activate.

4. I filled out my application package. How do I submit it to ORS?

You only need to save the application package and make sure that all of the required fields (generally in yellow) are completed. Submittal of the package is handled by ORS after reviewing and approving the packet.

Please be aware that ORS requires more than just the application package from Grants.gov. ORS proposal submissions must include a signed ORS Form 5, a print out of the entire proposal, and a copy of the RFP. To submit the electronic document please use the ORS File Uploader available on the ORS website. The hardcopies must be delivered to Sakamaki D200.

5. Why am I not able to attach documents to my application package?

Make sure the documents to be attached are closed. If left open or minimized at the bottom of the package, attempts to attach them will not be successful. Grants.gov accepts most standard document formats but does NOT accept the new Office 2007 formats (.pptx, .xlsx, .docx, .docm, .dotm, .dotx, .potm, .potx). For more information, click here.

For more information, contact:

ORS Helpdesk at 956-5198 or email: erahelpdesk@ors.hawaii.edu