

*my*GRANT: an ORS Perspective



**HIMB LEARNING OPPORTUNITY
TUESDAY, MAY 6, 2014**

Background



- **Kuali Coeus for Research Administration**
 - Initiative spearheaded by a consortium of institutions, developed by MIT
- **Deployed System-Wide in November 2011; Mandatory for all UH on February 16, 2012**
- **Managed by the University of Hawai‘i Office of Research Services (ORS)**
- **University’s migration to online systems**
- **Grants.gov System-to-System capability**
- **Required for every extramural research funding proposal submitted under UH**

Getting There



www.ors.hawaii.edu

SEARCH



Sponsor Funding
Opportunity Databases
& Sponsor Alert Services

APPLY



ORS Forms,
Proposal/Budget Development
& Proposal Review Process

START UP & MANAGE



Award Start-up,
Expenditure Management,
Compliance & Extensions

CLOSEOUT



Closing an Award,
Final Invoice
& Collections

REPORTS



Award Summaries,
E/M & Annual
Reports

myGRANT Info

[Award Status](#)

[Advance Notification](#)

Aloha!

The Office of Research Services strives to provide effective and efficient services to facilitate the stewardship of extramural funded activities and to promote innovation and creativity in partnership with the sponsors, university administrators and distinguished researchers in the University of Hawai'i System.

Quick Links

- [About ORS](#)
- [Forms](#)
- [Institutional Profile](#)
- [Rates](#)
- [Policies & Agreements](#)
- [ORS Directory](#)
- [Education & Training](#)
- [Newsletter](#)
- [BOR Reports](#)
- [myGRANT Information](#)
- [ARRA Information](#)
- [FFATA Information](#)
- [FCOI Information](#)
- [UH Related Offices](#)
- [UH Foundation](#)



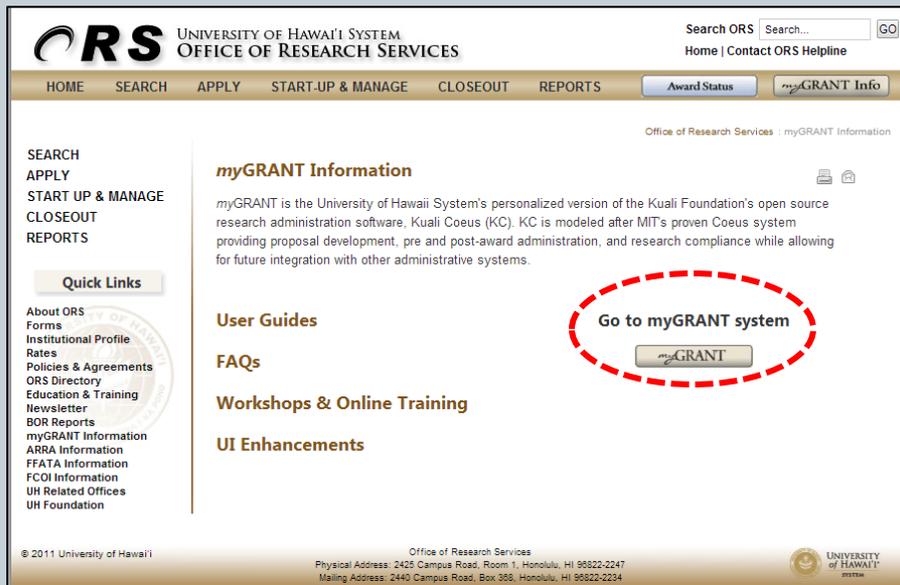
Scientific mission will explore one of the deepest ocean trenches
More...

- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08

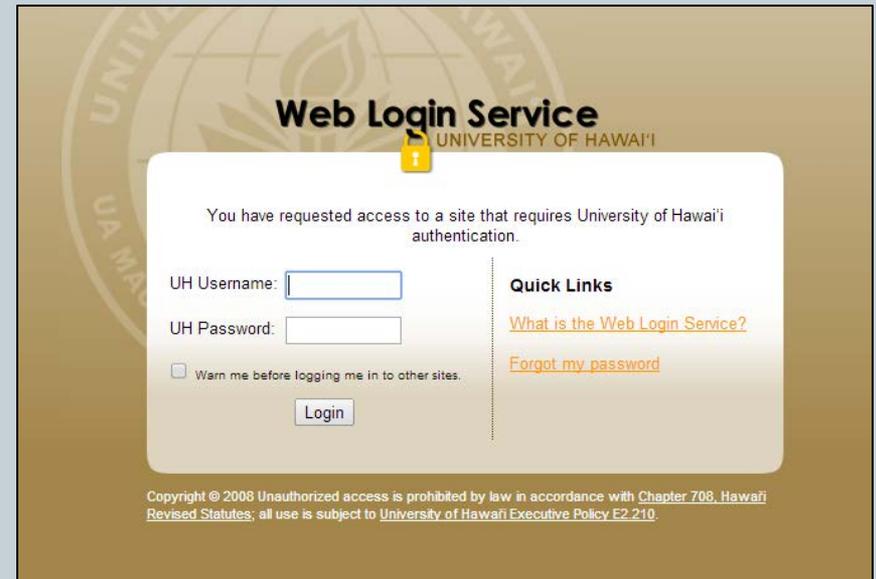
Getting There

myGRANT Info Link to Access System

Sign in Using University System credentials



The screenshot shows the ORS (Office of Research Services) website. The header includes the ORS logo and navigation links: HOME, SEARCH, APPLY, START-UP & MANAGE, CLOSEOUT, REPORTS, Award Status, and myGRANT Info. A search bar is located in the top right. The main content area is titled "myGRANT Information" and contains a paragraph describing the system. A red dashed oval highlights a button labeled "Go to myGRANT system" with a myGRANT logo. A sidebar on the left lists "Quick Links" such as About ORS, Forms, Institutional Profile, Rates, Policies & Agreements, ORS Directory, Education & Training, Newsletter, BOR Reports, myGRANT Information, ARRA Information, FFATA Information, FCOI Information, UH Related Offices, and UH Foundation. The footer contains copyright information and contact details for the Office of Research Services.



The screenshot shows the "Web Login Service" page for the University of Hawaii. The page features a large yellow padlock icon and the text "You have requested access to a site that requires University of Hawaii authentication." Below this, there are input fields for "UH Username:" and "UH Password:". A checkbox labeled "Warn me before logging me in to other sites." is present, along with a "Login" button. To the right, there is a "Quick Links" section with links for "What is the Web Login Service?" and "Forgot my password?". The footer contains copyright information: "Copyright © 2008 Unauthorized access is prohibited by law in accordance with Chapter 708, Hawaii Revised Statutes; all use is subject to University of Hawaii Executive Policy E2.210."

myGRANT Homepage



myGRANT OFFICE OF RESEARCH SERVICES UNIVERSITY OF HAWAII SYSTEM

Help Researcher Unit

action list doc search

5.1.1.14.04.25 (Oracle9i)

Contact ORS Helpline

Logged in User: tau7 Logout

Create Proposal Find My Proposals

NIH Guide NSF Guide

System to System (S2S) Guide NIH S2S General Guide

Add Sponsor Add Site Delegation Unit Routing

myGRANT Info ORS Reports FAQs ORS Helpline

Continue >>

The image shows a screenshot of the myGRANT homepage. At the top, there is a navigation bar with the myGRANT logo, the text 'OFFICE OF RESEARCH SERVICES UNIVERSITY OF HAWAII SYSTEM', and a 'Help' menu with sub-items 'Researcher' and 'Unit'. Below the navigation bar, there are two search boxes labeled 'action list' and 'doc search'. To the right, there is a 'Logged in User: tau7' indicator and a 'Logout' button. The main content area features a grid of icons for various functions: 'Create Proposal' (circled in red), 'Find My Proposals', 'NIH Guide', 'NSF Guide', 'System to System (S2S) Guide', 'NIH S2S', 'General Guide', 'Add Sponsor', 'Add Site', 'Delegation', 'Unit Routing', 'myGRANT Info', 'ORS Reports', 'FAQs', and 'ORS Helpline'. At the bottom of the main content area, there is a 'Continue >>' button.

Proposal Development Considerations

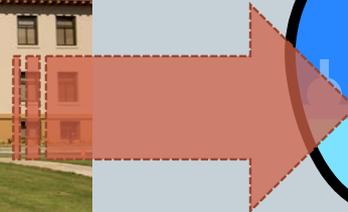
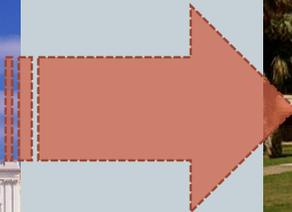


KEY THINGS TO THINK ABOUT

Guidelines



- Office of Management and Budget, Executive Office of the President
- University System-wide Administrative Procedures (UH APMs)
- Federal regulations controlling financial management systems
 - Change is Continuous – Compliance is Necessary



First Steps



- **Determine eligibility to apply as a PI under UH**
 - UH Board of Regents Chapter 12, Section 12-2
- **Download application package and instructions from the Funding Announcement**
 - Recycling application packages NOT encouraged
- **Thoroughly read through the funding announcement for any restrictions and conditions**
 - Are we eligible to apply?
 - Is there mandatory cost sharing?
 - Feasible deadline?
- **Plan with listed approvers for *myGRANT* approvals**

Proposal Package



- **Review Funding Announcement for:**
 - Scientific Narrative Format and Content Requirements
 - Budget Limits, Formatting, and Narrative Requirements
 - Submission Requirements and Procedure(s)
 - Late Submission Policy, if applicable
 - Award Information, if applicable
 - Important Agency Contact Information, if available

Proposal Package



- **Initiate *my*GRANT Proposal Development Document to complete accordingly**
 - *my*GRANT can be routed with a near final draft of the proposal to be replaced later by ORS
 - Budget should be final and pre-approved by your Fiscal Authority

Budgets



- **Indirect Cost Rates**

- Federally Negotiated Rates for recovering of indirect costs
- **UH APM A8.927** – Facilities & Administrative Cost Charges in Contracts and Grants
- Waivers or Reductions **require** OVCR approval, unless explicit information is available online, i.e. online FOA
 - ✦ **Unrecovered Indirect Costs** – noted in *myGRANT* proposal record

Budgets



- **Cost Sharing**
 - **UH APM A8.947** - Accounting for Cost Sharing
 - Generally **NOT** encouraged by the University
 - Cost Sharing can assume **financial liabilities**
 - Documentation of Cost Sharing Commitments is **ESSENTIAL!**
 - Specific locations in *myGRANT* to input cost share amounts and attach supporting documentation
- **Budget Narratives**
 - Should be **consistent, clear, and complete**



Planning is KEY



- **Advance Notice**
 - **Notify** ORS, HIMB Director's Office, and Fiscal Office of proposal submission plans & **provide** Funding Opportunity Announcement
- **ORS Timeframe for Review, Approval, and Submission**
 - Typically 3-5 business days **BEFORE** proposal deadline
 - Buffer Timeframe to allow for unforeseen issues
 - ORS can Co-Review for you, upon request
- **Budgets**
 - Is the appropriate Indirect Cost Rate applied?
 - Is there Cost Sharing? Do you have all your support documents?
- **Understand Everyone's Roles and Responsibilities**

Roles and Responsibilities



Office of Research Services : Apply : Roles and Responsibilities

Roles and Responsibilities

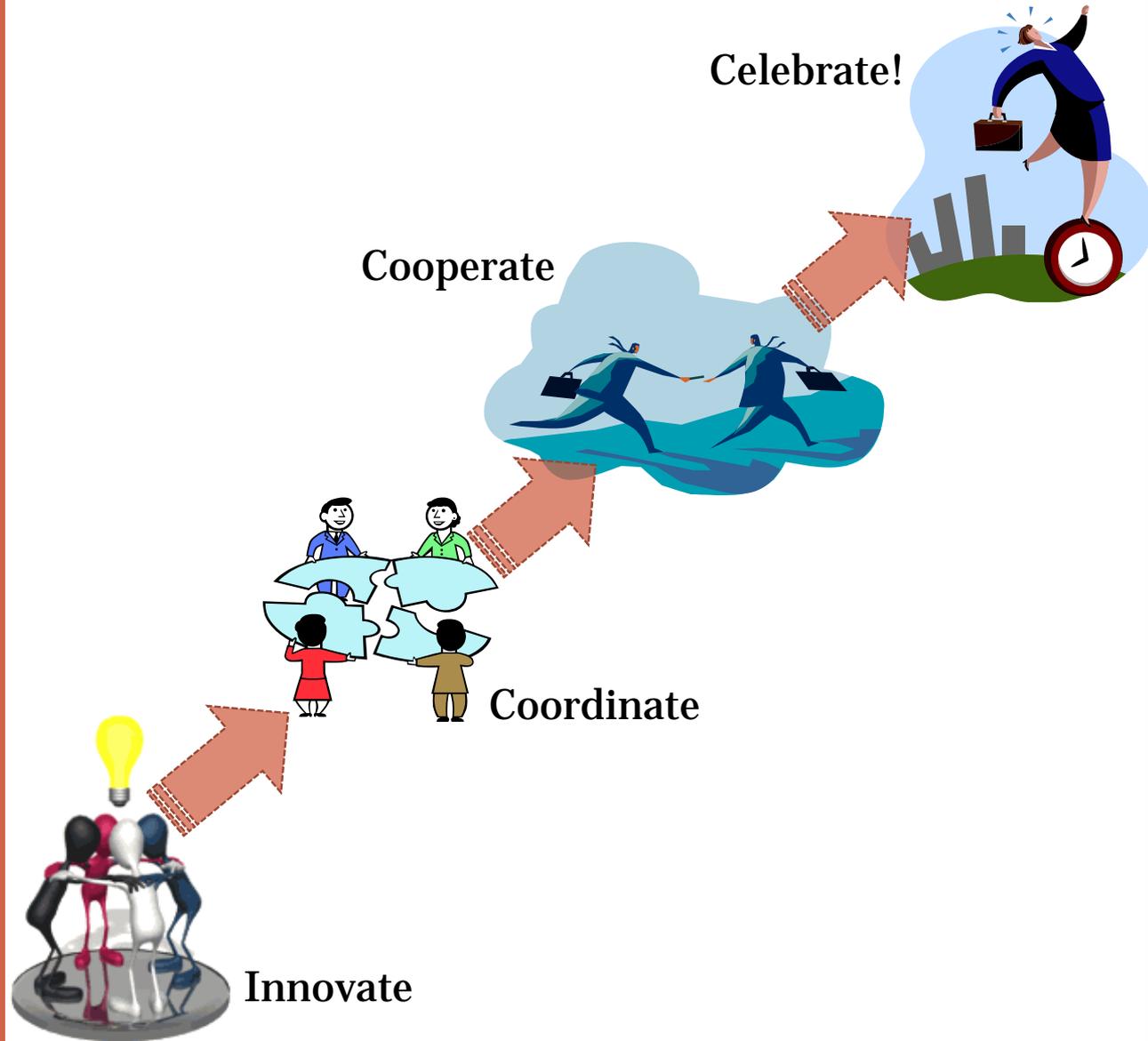


Research Administration Process	ORS	PI	DEPT
Identification of Funding Opportunities	----	----	----
Search for opportunities	X	X	
Distribute opportunity information	X		
Store and provide application forms as necessary	X		
Proposal Preparation			
Develop and revise technical narrative		X	
Assist PI in developing and revising non-technical narrative as appropriate/ relevant	X		
Develop and revise budget	X	X	X
Provide guidance to PI on proposal preparation (See Note 1)	X		X
Proposal Review and Approval			
Review and approve before sending to ORS		X	X
Provide institutional review of proposal	X		
Provide additional review of proposal as appropriate/ relevant	X		
Make revisions and corrections to proposal after institutional review		X	X
Provide institutional approval of proposal	X		
Record proposal information for tracking	X		
Proposal Submission			
Mail proposals to sponsors	X	X	X
Assist PI in electronic submission of proposals to sponsors	X		

Getting to the Finish Line

Best Practices:

- ✓ Plan Ahead
- ✓ Start *myGRANT* process early
- ✓ Communicate
- ✓ Coordinate
- ✓ Budget Appropriately
- ✓ Properly document any cost sharing commitments
- ✓ Work as a Team



Transition to Brief Demo



Helpful Resources



- **ORS Website – Institutional Profile**
 - <http://www.ors.hawaii.edu/index.php/institutional-profile>
- **ORS Helpline**
 - <http://www.ors.hawaii.edu/helpline/>
- **ORS Contracts & Grants Specialist**
 - Searchable Assignment Listing:
<http://www.ors.hawaii.edu/index.php/ors-assignments>
- **University System-wide Administrative Procedures**
 - <http://www.hawaii.edu/apis/apm/sysap.php>
- **UH Board of Regents Policies and Bylaws**
 - <http://www.hawaii.edu/offices/bor/policy/index.html>

Questions?

