Onboarding Checklist for New Weinberg Research Administrators

- Set up meeting with Weinberg Research Administration to go over onboarding checklist.

**Sign up for NU training courses**
- Finance Facilities and Research Administration (FFRA)
  - FMS505 Managing Sponsored Projects
  - FMS502 InfoEd Proposal Development
  - FMS503 InfoEd Routing and Workflow
  - FMS111 Running Cognos BI Reports

**Human Resources**
- HRS101 – FASIS lookup training
- HRS102 FASIS Deployment training (if applicable)
- HRD700 University Business Processes
- HRD705 Effective Business Operations: A Guide to Internal Controls

**Various**
- Effort Reporting 101 (contact Tina Mete c-mete@northwestern.edu)
- ORI Research Administration Training Seminar
- Excel classes (if needed)

**Verify you have received relevant system access**
- NU Financials
- InfoEd
- Cognos Reporting
- FASIS
- Effort Reporting System (ERS)
- Vista
- Conflict of Interest lookup in FASIS

**Join listservs**
- Weinberg Research Administration listserv (contact Weinberg Research Administration)
- Office for Sponsored Research (OSR) listserv
- InfoEd listserv
- Northwestern University Research Administration Professionals (NURAP)
- Sponsor-specific listservs:

*Updated 9/14*
National Institutes of Health (NIH)
National Science Foundation (NSF)
And others as applicable (DoD, NEH, etc.)

General
- Determine department/unit awards (run Cognos GM044 report)
- Meet or write to your OSR Grants Officer to introduce yourself
- Create a calendar for proposal submissions (or utilize existing one); find out what’s in the pipeline and communicate with your OSR Grants Officer (GO)
- Set up a tracking spreadsheet for proposals and award management

Proposal Development
- Read Proposal Development on Weinberg Research Administration website
- Learn salary and effort calculations process with Weinberg Research Administration assistance
- Review Weinberg Dean’s Office Tools for Research Administrators
- Review Conflict of Interest resources for administrators
- Review prior proposal submissions examples in InfoEd
- Discuss signing up for School of Continuing Studies course “Grantsmanship for the Research Professional” with your supervisor
- Identify helpful contacts in relevant areas (i.e. Weinberg Research Administration, Department business office, OSR, Accounting Services for Research and Sponsored Programs (ASRSP), Institutional Review Board (IRB), Institutional Animal Care and Use Committee (IACUC), Foundation Relations, etc.)
- Contact Mike Green in OSR to obtain sponsor system access for NSF (FastLane) and/or NIH (Commons)

Post-Award
- Review Cost Principles and Guidelines
- Become familiar with ESPR requests
- Familiarize yourself with Effort Reporting:
  - Effort Reporting and Sponsored Projects Quick Guide
  - Effort Reporting References available on ASRSP’s website
- Familiarize yourself with terms and conditions and which ones apply to your unit’s grants
  - FDP Research Terms and Conditions
  - Utilize department files or the Project Account Summary to determine which terms and conditions apply to your unit’s awards
- Establish who is responsible for monthly reconciliations

Familiarize yourself with
- OMB Circulars

Updated 9/14
Policies you need to be aware of

- Principal Investigator Eligibility
- Cost Sharing/Matching Funds
- Academic Salary Recovery/Direct Charge
- Summer Salary
- NIH Salary Cap
- Purchase of Personal Computers and Electronic Devices on Sponsored Projects
- Buybacks and Release Time Policy
- Export Controls/Foreign Nationals
- Charging Sponsored Projects
- Travel Policies

Useful Resources

- Northwestern University Research Administration Professionals (NURAP)
- Finance, Facilities and Research Administration Training Curriculum
- Weinberg Research Administration list of training presentations
- Attend Weinberg RA monthly meetings and brownbag sessions
- Attend OSR brownbag sessions