**Sample Outlook Quick Parts for RAs**

I have created these Quick Parts to standardize and streamline emails I send regularly. Please feel free to adapt any of them for your own use and share with your colleagues. I hope they save you time and make your job easier.

Please see [this Microsoft help article](https://support.microsoft.com/en-us/office/quick-parts-4ffef7c5-7596-4e95-9faf-41c771847a7b#ID0EDD=Outlook) for instructions on saving and inserting Quick Parts in Outlook.

***Account Summary***

Hi \_\_\_\_\_,

Your current grant and IIA account summary is attached. Please review it and let me know if anything is amiss.

You can also review your grant accounts at any time using the Principal Investigator Dashboard in Workday:

1. [Click here](https://www.myworkday.com/asu/d/home.htmld) to log into Workday
2. In the search bar, type Principal Investigator Dashboard (alternatively you can just type part of the name, e.g. “prin inv”) and click on Principal Investigator Dashboard – Custom Landing Page Group
3. Give the dashboard a moment to load
4. Click the link at the top to take the five-minute tour or explore on your own

Best,

***After-the-Fact Review Report***

Hi \_\_\_\_\_\_\_,

Please follow the steps below to view and approve your After-the-Fact (ATF) reports for [SEMESTER]. ATF reports are your chance to review personnel paid on your grant(s) and request any changes if needed. You can learn more and view the FAQs [here](https://researchadmin.asu.edu/after-the-fact-review-report).

**How to Review and Acknowledge Your Reports (takes ~5 minutes):**

1. [Click here](https://analyticsreporting.asu.edu/ReportServer/Pages/ReportViewer.aspx?/Analytics/ATF%20Review%20Reporting/ATF-Review-Report) to log into the After-the-Fact Review Report
2. Select **Faculty or Staff** and log in with your ASURITE ID and password
3. Select your award name from the Award drop-down menu and click **View Report**. An asterisk (\*) at the beginning means the report needs to be acknowledged.
4. **Review the personnel paid on your grant and make sure it looks correct.** Were these people actually working on this project? Does their pay look reasonable for the amount of work they contributed to the project? **If there are any errors, please let me know right away.**
5. If everything looks correct, click the green **Acknowledge** button at the top
6. On the pop-up window click **OK**
7. After a few seconds you will see a confirmation that your report has been acknowledged
8. Repeat steps 3-7 for any remaining awards. When you’re done, none of the awards will have a \* at the beginning.

Thanks,

***COI Training***

Conflict of Interest (COI) training is [now required](https://researchintegrity.asu.edu/coi/training-requirements) for all individuals who are responsible for the design, conduct, reporting or purpose of research on any sponsored project, regardless of sponsor. Previously it was only required for NIH grants. The training takes less than an hour to complete and is good for four years. **ORSPA will not complete any activations or modifications** unless all responsible individuals on that award have completed their training.

To complete the training:

1. [**Click here**](https://about.citiprogram.org/) to go to the CITI (third party) training site
2. Log into CITI with your asurite ID
3. Scroll to the bottom of the page under Lerner Tools and select “Add a Course”
4. Scroll to Question 5 “Would you like to take the Conflicts of Interest course?” and answer “Yes.” Select Submit at the bottom of the page.
5. On the Active Courses page, select “Start Now” next to the Conflicts of Interest Course
6. After completing the course and passing the quiz, select "View Post-Course Completion Options" and "Access your Completion Records," then "View/Print" your completion certificate and save it for your records

**If you have any questions on the training, please contact** **COI@asu.edu** (CCed here) for assistance.

***Driver Authorization***

# **How to Become an Authorized Driver**

It can take up to 18 days for authorization to be approved. Once the driver has completed all of the required steps, they will receive an email confirming they are authorized to drive or they may check their status at any time in the authorized driver system.

## **Employee/Student Worker**

To complete the authorized driver program, you must:

1. **Have Your Position Identified.**This step is completed by your department’s HR specialist or Business Operations Manager in PeopleSoft. If a driver’s position is set to “Not Applicable” or is blank, this may cause the driver to show as not authorized. The position type varies based on the employee job. Drivers identified as “required” must complete the program and cannot opt out at any time. **If a position is not identified within 30 days, the system will flip the driver to “Not Authorized”.**

The four different position types are:

* **Department required** | At the department discretion, the employee or volunteer must drive, rent or lease an ASU vehicle, including electric carts, as part of the regular job duties.
* **Not applicable** | The employee or volunteer will not drive, rent or lease any ASU vehicle, including electric carts.
* **Optional** | At the department discretion, the employee or volunteer may drive, rent or lease an ASU vehicle, including electric carts.
* **Required** | The employee or volunteer must drive, rent or lease an ASU vehicle, including electric carts as part of their regular job duties.
1. **Consent to the program through My ASU (one-time).**You only need to consent to the program one time. Flipping your consent from yes to no may result in delays to your authorization. [How to consent to the program](https://asu.service-now.com/kb_view.do?sysparm_article=KB0020209#How_To_Consent)
2. **Have a successful 39-month motor vehicle annual records check (annually).**You do not need to pull your own MVR unless you need to drive immediately. Once you consent to the program and accurately enter your driver’s license information, the system should automatically trigger your MVR check. The MVR expires one year from the date of the last MVR check. It can take up to 18 days to complete the MVR**.**
3. **Complete the authorized driver training (one-time).**Employees complete the training in Career EDGE. The training only needs to be completed once unless you are notified of an unsatisfactory motor vehicle report. For links to the authorized driver training [**click here**](https://cfo.asu.edu/defensive-driving-training).

***Driver Authorization Step 2***

Thank you for completing the online training. For the next step, please go to [My ASU](https://my.asu.edu/) > My Employment > Personal and click on Authorized Driver Program. You’ll need to enter your driver’s license information so ASU can pull your motor vehicle record and verify that you’re Authorized to Drive.

***ERA Mod Approval***

Hi \_\_\_\_,

I’ve submitted the \_\_\_\_\_ request on your \_\_\_ account GR\_\_\_\_\_. Please follow these instructions to review and approve the request:

1. Click this link to access the request: \_\_\_\_\_\_
2. After reviewing the request, click on the  button located under the “My Activities” section located on the left side of the screen (will open a new window)
3. In the new window, you will see a dropdown menu under the field labeled “Determination”
4. The dropdown menu includes the following options:



1. Select the appropriate determination (Approve, Decline or Request Changes).
2. Follow any additional prompts
3. Click OK

***eRA Commons New User***

Hi \_\_\_\_\_\_\_,

NIH requires that all personnel working on NIH grants have usernames in their online reporting system, eRA Commons. I have created a username for you, and you will receive an automated email from eRA Commons shortly with your default password.

            Your eRA Commons Username: \_\_\_\_\_\_\_

When you get the email, please log into [eRA Commons](https://public.era.nih.gov/commons/public/login.do) with your username and default password. Follow the prompts to set your own password and enter your degree information, etc. You are the only person who can edit this information, and it is required for your PI to submit their annual report.

**Please reply all** to let \_\_\_\_\_\_\_ and me know when you have logged onto eRA Commons and entered your information.

***Expense Transfer Request***

(Subject) Expense Transfer Request: \_\_\_\_ to \_\_\_\_

Hi \_\_\_\_\_,

Please transfer the expense(s) on the attached document.

**Transfer From (Credit):**

**Transfer To (Debit):**

**DRR Worktag (Debit):**

DR05845 KED-Category 1 - Transposition Error

DR05847 KED-Category 1 - Intra-Award Adjustment

DR05848 KED-Category 1 - Non-Sponsored

DR05853 KED-Category 1 - Cost Share

DR05851 KED-Category 2 - Department CTR Approval (<$1k, >90 days before end)

DR05852 KED-Category 3 - ORSPA CTR Approval

**Amount to Transfer:**

1. **Describe in detail the expenditure(s) that are being transferred:**
2. **Describe the benefit to the project receiving the expense transfer:**
3. **How did the error occur?**
4. **What steps are being taken to ensure that this error will not happen again?**

***Funding Opportunities***

Hello,

Please review the following funding opportunities. If you are interested in applying for any opportunity, please contact [PRE-AWARD RA/TEAM] at \_\_\_\_\_\_\_\_\_\_\_\_. I have included the full information for the opportunities that I thought would be most relevant for [DEPARTMENT/SCHOOL] faculty, and below are links to all the available funding opportunities.

|  |  |  |
| --- | --- | --- |
| **Sponsor** | **Description** | **Deadline** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

***iLab Access Approval***

Hi \_\_\_\_\_,

Do you approve adding \_\_\_\_\_ to your group in iLab?

If so, what account(s) do you authorize them to make charges on?

With your approval, I’ll log into iLab and grant \_\_\_\_\_ access for you.

***iLab Invoice >$1k***

Hi \_\_\_\_\_,

I wanted to be sure you saw this iLab invoice on your [SPONSOR] grant \_\_\_\_\_\_\_ since it’s over $1k. If anything looks amiss, please email KEFinanceSRC@exchange.asu.edu and CC me.

Thanks,

***iLab New PI***

ASU uses [iLab](https://asu.corefacilities.org/landing/261) to reserve shared equipment/facilities and process the billing. If you haven’t already, please check out [this page](https://cores.research.asu.edu/what-ilab) and click the “I’m an ASU Researcher” button to register for iLab and set up your group. Once it’s set up, I can assign users to your group and manage who can place orders on which accounts.

***iLab New User***

ASU uses [iLab](https://asu.corefacilities.org/landing/261) to reserve shared equipment/facilities and process the billing. If you haven’t already, please check out [this page](https://cores.research.asu.edu/what-ilab) and click the “I’m an ASU Researcher” button to register for iLab and request access to \_\_\_\_\_\_\_\_’s group.

***NCE Justification***

Please send a justification that addresses the bullet points below, and I’ll prepare the no-cost extension request in ERA for you.

**No-Cost Extension**

* How long of an extension is needed? One year (new end date \_\_\_)
* What caused the delay in completing the project objectives during the approved project period?
* Which project objectives are left to complete?
* How do you plan to use the remaining funds (salaries, services, supplies, etc.)?

***New Award Email***

Hi Dr. \_\_\_\_\_,

Congratulations on your new [sponsor] award! The award notice has been fully executed, and your new account has been created. The award notice, statement of work, final budget dated \_\_\_\_\_, and budget justification are attached for your reference.

**Project Title**:

**Sponsor Award Number**:

**ASU Account Number**: GR

**Cost Share/Subaward/Participant Support/Child Account**:

**Start Date**:

**Obligated End Date**:

**Anticipated End Date**:

**Direct Award Year 1**:

**Total Award Year 1**:

**Anticipated Total Award**:

*(Note to RA: Only include relevant sections/information.)*

**Carryover**:

1. Carryover is automatic from year to year, which means next year’s funds will be added to the same account and we don’t have to request approval to carry funds from one project year to the next. OR
2. The sponsor awarded all \_\_\_ years at once, so we don’t need to wait on a modification for next year’s funding. OR
3. Carryover is NOT automatic, which means next year’s funding will be in a separate account and we’ll need to request sponsor approval to carry funds from one project year to the next.

**Deliverables**: Please note deliverable schedule on page \_\_\_\_ of the award notice.

**Foreign Travel**: Your budget includes funds for foreign travel. Be sure to submit a trip request in Concur before booking any travel. Please check with me before booking any flights on a non-US airline so I can confirm whether it complies with the Fly America Act.

**Progress Reports**: Your first technical progress report is due \_\_\_\_\_\_. (For NSF) Please log into [Research.Gov](https://www.research.gov/research-web/) and follow [these instructions](https://www.research.gov/common/attachment/Desktop/NSF_RGov_RPPR_ScreenshotsandInstructions.pdf) to complete your report. (For NIH) The RPPR is completed in [eRA Commons](https://www.era.nih.gov/). Full instructions are available [here](https://grants.nih.gov/grants/rppr/rppr_instruction_guide.pdf).

**Publications**: Your budget includes \_\_\_\_ for publication fees. Please be sure to credit the sponsor in any publications associated with this research and include the publications in your annual progress report.

**Summer Salary**: The budget includes \_\_\_\_ months of summer salary for you and \_\_\_ months for [co-PI]. (For NSF) Please note that NSF limits each person to 2 months of summer salary per calendar year across all NSF grants.

**My Questions**:

* **Personnel** – Your budget includes funds for [titles/names] in the first year. Should anyone be paid on this grant right away?
* **Start Date** – The start date is \_\_\_\_. (If in the past) Do you have any expenses since that date that need to be transferred to this account? (If in the future) Would you like to request a pre-award to move the start date back up to 90 days? Under expanded authorities ASU can notify the sponsor that we’re using our pre-award rather than request permission.
* **Services** – Your budget includes funds for services/facility user fees. Would you like me to add this account to iLab? If so, who do you authorize to assign iLab charges to it?

 **[Pre-award RA]**, is there anything else from FP\_\_\_\_ that I should be aware of?

***NIH RPPR***

Your first Research Performance Progress Report (RPPR) is due \_\_\_\_\_. The RPPR is completed in [eRA Commons](https://www.era.nih.gov/). Full instructions are available [here](https://grants.nih.gov/grants/rppr/rppr_instruction_guide.pdf). Attached you’ll find a summary of everyone who was paid on this award during the reporting period.

*Due Date Calculation*

• SNAP: If an award is issued under the SNAP (Streamlined Noncompeting Award Process) provisions, the progress report is due the 15th of the month preceding the month in which the budget period ends (e.g., if the budget period ends 11/30, the due date is 10/15). If the 15th falls on a weekend or Federal holiday, the due date is automatically extended to the next business day. Recipients should consult the NoA to determine when SNAP procedures apply.

• Non-SNAP: If an award is not issued under the SNAP provisions, the progress report is due the first of the month preceding the month in which the budget period ends (e.g., if the budget period ends 11/30, the due date is 10/1).

***NSF Annual Report***

Please log into [Research.Gov](https://www.research.gov/research-web/) and follow [these instructions](https://www.research.gov/common/attachment/Desktop/NSF_RGov_RPPR_ScreenshotsandInstructions.pdf) to complete your Annual Project Report (APR). The report is due during the 90 days prior to the end of the current budget period (\_\_\_\_ to \_\_\_\_\_). Attached you’ll find a summary of everyone who was paid on this award during the reporting period.

***Payroll Redistribution Request***

Hi \_\_\_\_\_\_\_\_,

Please submit the following payroll redistributions:

Employee Name

Position ID

Transfer From

Transfer To

**DRR Worktag:**

DR05845 KED-Category 1 - Transposition Error

DR05847 KED-Category 1 - Intra-Award Adjustment

DR05848 KED-Category 1 - Non-Sponsored *Answer question 1*

DR05853 KED-Category 1 - Cost Share

DR05851 KED-Category 2 - Department CTR Approval (<91 days since end of semester, ATF report not acknowledged)

DR05852 KED-Category 3 - ORSPA CTR Approval

|  |  |
| --- | --- |
| **Pay End Date** | **Amount to Transfer** |
| 3/3/2024 |   |
| 3/17/2024 |   |
| 3/31/2024 |   |
| 4/14/2024 |   |
| 4/28/2024 |   |
| 5/12/2024 |   |
| 5/26/2024 |   |
| 6/9/2024 |   |
| 6/23/2024 |   |
| 7/7/2024 |   |

1. **Reason why payroll expenses are being transferred:** See department worktag
2. **What corrective action will be taken to avoid this type of error in the future?** See department worktag
3. **Describe why all costs transferred to new accounts are allowable, allocable, and reasonable charges. Additionally, if a sponsored account, describe why costs are appropriate and necessary to the performance of the sponsored project.** as described in the sponsor-approved budget.

***Rebudget Justification***

Please send a justification that addresses the bullet points below, and I’ll prepare an ERA award change request for your approval.

**Budget Revision**

* Briefly explain what prompted the budget revision.
* How will the proposed change benefit and/or improve the project?
* How will the Scope of Work be impacted as a result of this change?
* What budget category(s) would you like to pull funds from?

***Subaward Invoice Approval***

Hi Dr. \_\_\_\_\_\_\_\_,

\_\_\_\_\_ has submitted an invoice for your approval. Please approve the invoice in Workday so they can get paid.

1. Click [here](https://www.myworkday.com/asu/d/home.htmld) to log into Workday
2. Click on the inbox icon in the upper right-hand corner or enter \_\_\_\_\_\_ in the search bar
3. Review the invoice and click the Approve or Send Back button. Your approval means that the subrecipient is up-to-date on their portion of the scope of work and deliverables.

***Travel Claim Reminder***

Hi \_\_\_\_\_,

Please log into [My ASU Trip](http://myasutrip.asu.edu/login) to submit the claim for your travel to [CONFERENCE/CITY] in [MONTH]. The [My ASU Trip Travel Guide](https://www.asu.edu/fs/travel/MyASU-Trip-travel-guide.pdf) has step-by-step instructions starting on page 70. [ASU travel policy](http://www.asu.edu/aad/manuals/fin/fin501.html) requires that travelers submit and certify an expense report within 30 days of the trip end date. Please be sure to include any airfare purchased in Concur or travel card expenses.

***Trip Request***

Hi \_\_\_\_\_,

Thank you for submitting your trip request. I’ve approved it in Concur, and you’ll receive an automated email when your trip request is fully approved. Some notes for your trip:

* **Airfare** – Once your trip request is fully approved, you can book your airfare in [Concur](https://myasutrip.asu.edu/login) or directly with the airline. Note: If you book an international flight outside of Concur, you must enter your itinerary in Concur following [these instructions](https://www.asu.edu/fs/travel/itinerary-guide.pdf) to ensure reimbursement.
* **Conference Registration** – You can either (A) pay for your conference registration out of pocket and submit it for reimbursement with your expense report or (B) submit an SMS webtools requisition with the 4-character trip request ID so Laura or Carmen can use their p-card for your registration.
* **Hotel** – If you book your hotel/lodging outside of Concur, please email your itinerary to myasutrip@asu.edu before your trip so ASU Travel can fulfill their duty of care. Itemized receipts are required for hotel charges.
* **Receipts** – Receipts are required for all reimbursements over $50. Tips are capped at 20%.
* **Expense Report** – Please log into [Concur](https://myasutrip.asu.edu/login) to submit your expense report within 30 days of your travel end date. The My ASU Trip [travel guide](https://www.asu.edu/fs/travel/MyASU-Trip-travel-guide.pdf) has step-by-step instructions for completing your expense report starting on page 70. You will receive your reimbursement by direct deposit (the same as your paycheck) within 10 days of approval.
* **Daily Allowances/Per Diem** – To claim standard per diem/meals reimbursement on your expense report, first create an itinerary (see page 79 of the [travel guide](https://www.asu.edu/fs/travel/MyASU-Trip-travel-guide.pdf)), then check off the meals you’d like to *exclude*. You will receive per diem for all the unchecked meals.

Happy trails,