Closeout Project Update

April 9, 2015
ORA Quarterly Meeting

Laura Jensen, Blake Perrault, Darrell Queen

Agenda

The Goal: Clean Close
Tuition Remission Forums
Master Data Updates
Closeout Documentation Review
Closeout Tasklist: Enhancements & Demonstration
The Vision of the Future:
Clean Close for Sponsored Projects

What Does Clean Close Mean?

**BY THE SPONSOR DRIVEN CLOSEOUT DEADLINE, ALL PROJECT RELATED ALLOWABLE ALLOCABLE AND REASONABLE EXPENSES ARE POSTED TO THE PROJECT WBSE BEFORE SUBMITTING REQUIRED CLOSEOUT DOCUMENTATION TO OSP.**

As an institution, Duke has identified essential policies, processes, and technology tool improvements to enable research administrators to achieve this vision.

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Tuition Remission Forums

**April 2015 Forums**

- RCC email invitation, dated 3/20/15
- Register via LMS
- Tues., April 14, 3-4:30pm Bryan Research Bldg, Rm 103
- Weds., April 22, 10-11:30am Bryan Research Bldg, Rm 103
- Thurs., April 23, 3-4:30pm French Family Science Center 2231
- Weds., April 29, 3-4:30pm Bryan Research Bldg, Rm 103
- Thurs., April 30, 10-11:30pm FCIEMAS Bldg, Schiciano Auditorium, Pratt School
Master Data Updates

Master Data Maintenance Reminders

• Changes are made through Duke@Work portal
• GM1/GM2 fields can be critical to workflow
• Backstop code will be used primarily for default code at closeout
• Technology enhancements/solutions will include master data fields consistently going forward - including backstop code
• Maintained by Department – please keep fields updated!

Closeout Documentation Review

Upcoming changes to submission and review process

• Changes to be announced by OSP in coming weeks
• New email set up for submission of closeout documentation and follow-up
• Implementation Teams (Campus and SOM) to complete the initial review of closeout documentation and respond to submitter
• SOM Implementation Team will provide confirmation when no further action is needed
• SOM Implementation Team will provide detailed feedback/guidance if adjustments are needed
• Expected to start in April 2015
Closeout Tasklist

Version 3 Enhancements

- Closeout Tasklist will be mandatory effective **July 1, 2015**
- Ability to include multiple tasklists/WBSEs (under one parent) in one workbook
- Provides a summary of all tasklists within the workbook/under a parent along with each tasklists’ status bar
- Simplifies navigation within the workbook
- Separates the Human Subject/IRB section into separate components to allow for easier completion
- eConfirmation/electronic signatures for CRU (RPM, FPM, DOCR, SOM-Finance)
- Allows flexibility in the number/type of subcodes included on a PI Attestation
- **Expected mid to late April 2015**

SOM Implementation Team

The Implementation Team will provide support to departments easing the transition to a new clean close environment.

**Laura Jensen, Team Lead**
Blake Perrault
Darrell Queen
Vacant position - TBD

Email Communication
Address: SOMImplementation@duke.edu
Subject Line, CLOSEOUT PROJECT: Subject
Questions?