APR Award Set Up Team  
Summary of Recommendations  

For Presentation to Dean’s Council – June 10, 2009

**Quick Wins**
- a. Create dedicated award set up team
- b. Match all newly arrived awards to WISPER records every morning
- c. Eliminate RSP review of new awards before collection step
- d. Eliminate supervisor review step before accountant begins contract set up
- e. Refine Award Summary print report provided by pre-award to accountants
- f. Validate Award Summary report during contract set up
- g. Enter fiscal terms during contract set up
- h. Identify specific contract set up staff

**Key Improvements Requiring IT Resources**
- i. Identify award set up contact by department in WISPER
- j. Eliminate division response to notify RSP of complete collection
- k. Email reminder of pending protocols 45 days before start date
- l. Default PI in commitments section on projects tab
- m. Add required validation before department can forward to RSP
- n. Validate dept. ID/program code match on new awards
- o. Email reminder to campus of delinquent collection tasks (i.e., 4, 8, 12 days)
- p. Create collection delinquent exception report (i.e., more than 12 days)
- q. Create report to remind RSP of pending records
- r. Email accountant weekly identifying new projects in his/her portfolio
- s. Create workload management report
- t. Email PI/Department regarding status of pending proposals
- u. Automate milestone entries
- v. Create dashboard of division reports

**Training and Additional Solutions**
- w. Train campus on key personnel and commitments
- x. Add award information and process to Research Admin. 101 seminars
- y. Document award information and process on RSP website
- z. Make WISPER help tools more evident and easily accessible
- aa. Identify and list types of awards & units for which RSP will perform collection
- bb. Email campus with webpage listing unidentified awards
- cc. Clarify milestone entry and eliminate individual accountant tickler files