

Training Plan for the Post-Award Administrator

This training plan is designed to equip a Post-Award Administrator with the foundational knowledge and skills necessary to support a faculty investigator in award management and to collaborate with central post-award administration in completing sponsor reports.

The plan focuses on financial management, compliance, reporting, and award administration. Following this training plan, the Post-Award Administrator will develop the necessary skills and knowledge to effectively support the faculty investigator with award management and collaborate with central post-award administration.

Phase 1: Foundation Building

TOPIC	LEARNING OBJECTIVE	RESOURCE
Institutional Overview	<ul style="list-style-type: none"> ▪ Describe the university's structure, mission, and research priorities 	RAE Instructor-led Day 1 (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> ▪ List Research Grants & Contracts (RGC) and college/school/department roles and responsibilities 	RAE Instructor-led Day 2 (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> ▪ Locate Emory's financial management policies and procedures 	
Post-Award Process	<ul style="list-style-type: none"> ▪ Walk through the lifecycle of an award, from award setup to closeout. 	SRAi LevelUp Course: Relationships, Roles, and Responsibilities in Research Administration SRAi LevelUp Course: Principles of Post-award Non-Financial Administration SRAi LevelUp Course: Principles of Post-Award Financial Research Administration https://sot.emory.edu/research-training/rae.html
	<ul style="list-style-type: none"> ▪ Identify the role of the post-award administration in the award lifecycle 	RAE Instructor-led Day 2 (https://sot.emory.edu/research-training/rae.html)

	<ul style="list-style-type: none"> ▪ Distinguish grants, cooperative agreements, and contracts 	
Financial Management Basics	<ul style="list-style-type: none"> ▪ List and apply cost accounting principles and allocation methods 	<p>SRAi LevelUp Course: Principles of Post-award Non-Financial Administration</p> <p>SRAi LevelUp Course: Principles of Post-Award Financial Research Administration</p> <p>https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> ▪ Distinguish budgets, expenditures, and revenue recognition. 	<p>RAE Instructor-led Day 2</p> <p>https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> ▪ Describe effort certification and Emory's effort certification process 	<p>Effort Certification for Pre-Reviewers</p> <p>https://emory.brainier.com/#/object/1645</p> <p>Effort Certification (https://rbo.emory.edu/cost-studies/effort_certification/index.html)</p>
Compliance Fundamentals	<ul style="list-style-type: none"> ▪ Summarize financial compliance and relevant federal regulations 	<p>Research Compliance Frameworks</p> <p>https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> ▪ Locate Emory's institutional policies and procedures for financial compliance 	<p>RAE Instructor-led Day 2</p> <p>https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> ▪ Describe the importance of research integrity and misconduct 	
Communication and Collaboration	<ul style="list-style-type: none"> ▪ Develop effective communication skills with faculty investigators, staff, and sponsors 	<p>SRAi LevelUp Course: Relationships, Roles, and Responsibilities in Research Administration</p> <p>https://sot.emory.edu/research-training/rae.html</p>

	<ul style="list-style-type: none"> ▪ Build relationships with key stakeholders 	ORA Boot Camp: Hi Post-Award, Meet Pre-Award https://emory.brainer.com/#/object/2338
	<ul style="list-style-type: none"> ▪ Identify best practices in managing expectations and deadlines 	

Phase 2: Practical Application

TOPIC	LEARNING OBJECTIVE	RESOURCE
On-the-Job Training	<ul style="list-style-type: none"> ▪ Shadow an experienced Post-Award Administrator on various proposal development tasks 	
	<ul style="list-style-type: none"> ▪ Assist with financial reporting, effort certification, and sub/award management 	
	<ul style="list-style-type: none"> ▪ Learn how to use Emory institutional systems for award/financial management, effort certification, and reporting <p><i>*Note: Compass training is available in Brainer for RGC staff on Accounts Receivable, Award Receipts & Set-Up, and Letter of Credit Management</i></p>	Compass: Introduction to Compass Fundamentals https://emory.brainer.com/#/object/1556 Compass: Account Administrator for Data Managers https://emory.brainer.com/#/object/1077 Compass: Grants Project Activity Status https://emory.brainer.com/#/object/1067 Compass: Introduction to Expense Reports https://emory.brainer.com/#/object/1007 Compass: Introduction to Inputting & Processing Budget Journals https://emory.brainer.com/#/object/1040 Compass: Introduction to Payment Requests https://emory.brainer.com/#/object/1059 Compass: Journal Mover https://emory.brainer.com/#/object/1079

		Compass: P-Card Reconciliation, Policies, & Procedures (https://emory.brainier.com/#/object/976)
Award Types	<ul style="list-style-type: none"> ▪ Distinguish between cost-reimbursable and fixed-price agreements 	RAE Instructor-led Day 2 (https://sot.emory.edu/research-training/rae.html)
Award Management	<ul style="list-style-type: none"> ▪ Develop a strong understanding of award terms and conditions 	<p>SRAi LevelUp Course: Principles of Post-Award Non-Financial Administration</p> <p>SRAi LevelUp Course: Principles of Award Negotiation and Set-up</p> <p>(https://sot.emory.edu/research-training/rae.html)</p>
	<ul style="list-style-type: none"> ▪ Learn how awards are set up in Emory’s financial systems 	RAE Instructor-led Day 2 (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> ▪ Practice budget analysis and expenditure monitoring 	<p>ORA Boot Camp: Best Practices in Award Management (https://emory.brainier.com/#/object/1894)</p> <p>ORA Boot Camp: Mastering Award Management – Leveraging FORT and Beyond (https://emory.brainier.com/#/object/2417)</p> <p>Financial Outlook Reporting Tool (https://ebi.emory.edu/fort/index.html)</p>
Technical & Financial Reporting	<ul style="list-style-type: none"> ▪ List the different types of technical and financial reports required by sponsors, and who is responsible for preparing and submitting each 	RAE Instructor-led Day 2 (https://sot.emory.edu/research-training/rae.html))

	<ul style="list-style-type: none"> Practice reading prepared financial reports and understanding submission deadlines 	<p>ORA Boot Camp: Avoiding RPPR Pitfalls – <i>specific to NIH awards</i> https://emory.brainier.com/#/object/1892</p>
Compliance Deep Dive	<ul style="list-style-type: none"> Identify compliance areas relevant to the faculty investigator’s research (e.g., human subjects, animal welfare, conflict of interest) 	<p>SRAi LevelUp Course: Principles in Proposal Development https://sot.emory.edu/research-training/rae.html</p>
Effort Reporting	<ul style="list-style-type: none"> Describe federal requirements for reporting effort 	<p>RAE Instructor-led Day 3 https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> Identify Emory’s systems, policies, procedures, and timeline for reviewing and certifying effort 	<p>Effort Certification for Pre-Reviewers https://emory.brainier.com/#/object/1645</p> <p>Effort Certification (https://rbo.emory.edu/cost-studies/effort_certification/index.html)</p>

Phase 3: Advanced Skills

TOPIC	LEARNING OBJECTIVE	RESOURCE
Subaward Invoicing & Management	<ul style="list-style-type: none"> Describe subaward processes and regulations 	<p>SRAi LevelUp Course: Principles in Proposal Development</p> <p>SRAi LevelUp Course: Principles of Post-Award Non-Financial Research Administration</p> <p>https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> Describe Emory's subaward processes and regulations 	<p>RAE Instructor-led Day 1</p> <p>https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> Describe Emory's subrecipient oversight and reporting processes 	<p>ORA Boot Camp: Subawards and Subcontracting at Emory</p> <p>https://emory.brainier.com/#/object/1911</p> <p>Tuesday Tech Tip: Locating Subrecipient Information in the OSP Subaward System</p> <p>https://emory.brainier.com/#/object/2173</p>
Award Modifications	<ul style="list-style-type: none"> Describe processes for requesting and managing award modifications 	<p>SRAi LevelUp Course: Principles of Post-Award Non-Financial Research Administration</p> <p>https://sot.emory.edu/research-training/rae.html</p>
	<ul style="list-style-type: none"> Analyze the impact of modifications on budgets, subrecipients, effort reporting, and technical/financial reporting 	<p>RAE Instructor-led Day 2</p> <p>https://sot.emory.edu/research-training/rae.html</p>
Closeout	<ul style="list-style-type: none"> Identify the steps, timeline, and requirements for financially closing an award 	<p>SRAi LevelUp Course: Principles of Post-Award Non-Financial Research Administration</p> <p>SRAi LevelUp Course: Principles of Post-Award Financial Research Administration</p>

		https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Describe the process for preparing final reports and required documentation 	RAE Instructor-led Day 2 https://sot.emory.edu/research-training/rae.html)

Phase 4: Ongoing Development

TOPIC	LEARNING OBJECTIVE	RESOURCE
Professional Development	<ul style="list-style-type: none"> Attend conferences and workshops related to post-award administration 	National Council of University Research Administrators (NCURA) https://www.ncura.edu/ Society of Research Administrators International (SRAi) https://www.srainternational.org/home
	<ul style="list-style-type: none"> Earn relevant certifications (e.g., Certified Financial Research Administrator) 	RACC Study Program https://sot.emory.edu/research-training/racc-program.html)
	<ul style="list-style-type: none"> Comply with the ORA Continuing Education requirement 	ORA Policies and Guidelines https://ora.emory.edu/guidance/)
Staying Updated	<ul style="list-style-type: none"> Keep up with changes in regulations and policies 	ORA Communications
	<ul style="list-style-type: none"> Maintain knowledge of Emory policies related to sponsored projects 	ORA Policies and Guidelines https://policies.emory.edu/policies-list.html)
	<ul style="list-style-type: none"> Monitor relevant funding opportunities and trends 	Sponsor listservs/updates: <ul style="list-style-type: none"> NIH (https://list.nih.gov/) NSF (https://new.nsf.gov/news) Grants.gov Community Blog https://grantsgovprod.wordpress.com/)

Additional Tips	<ul style="list-style-type: none"> ▪ Explore mentorship with an experienced colleague 	
	<ul style="list-style-type: none"> ▪ Access and review relevant resources, such as policy manuals, training materials, and online databases 	
	<ul style="list-style-type: none"> ▪ Ask questions and seek clarification 	
	<ul style="list-style-type: none"> ▪ Seek supervisor feedback and evaluation to assess training effectiveness 	