Congratulations on your new award! While the principal investigator (PI) is the initiator of all actions related to the sponsored project, the Office of Sponsored Programs (OSP) and your unit are available to assist you. In addition, the EHE Office of Research staff are also available to provide assistance. If you would like, you can schedule an initial meeting with our Post Award Grants Manager, Michael Moses, to review your award and determine your next steps such as:

- Your role as a PI in the post-award phase
- Who does what (you, your Department or Center, EHE Office of Research, OSU Office of Sponsored Projects)
- Getting your project started, including personnel appointments
- Overview of the PI Portal
- Any questions you might have, such as space needs, technology setup, etc.

The next section provides important post-award information regarding your award. A tutorial on how to navigate the PI Portal is found on pp. 4-6.

**ACTION ITEMS**

✓ **Personnel Appointments** - Work with your human resources and fiscal professionals (see Table 1) to ensure that effort appointments are made appropriately. To meet commitments to the sponsor and ensure compliance with time and effort reporting requirements, it is very important that you initiate project appointments immediately.

**Table 1. EHE Human Resources and Fiscal Professionals**

<table>
<thead>
<tr>
<th>Department/Center</th>
<th>Human Resources</th>
<th>Fiscal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>Jodi Renshaw</td>
<td>Kelly Crawford</td>
</tr>
<tr>
<td>Educational Studies</td>
<td>Jodi Renshaw</td>
<td>Faith Haleem</td>
</tr>
<tr>
<td>Human Sciences</td>
<td>Terra Metzger</td>
<td>Mark Irvine</td>
</tr>
<tr>
<td>Teaching and Learning</td>
<td>Jackie Severance</td>
<td>Kyle Davison</td>
</tr>
<tr>
<td>CETE and Ohio Resource Center</td>
<td>Al Knox</td>
<td>Donna Smith</td>
</tr>
<tr>
<td>CCEC and Schoenbaum Family Center</td>
<td>Al Knox</td>
<td>Bobbie Bowling</td>
</tr>
</tbody>
</table>
Subcontracts/Subawards - If part of the work will be subcontracted to another organization, complete the Request for Subcontract form and send it to Anna Shadley (EHE’s Sponsored Programs Officer) with a statement of the work to be performed by the subcontractor.

Consultants - If part of the work will be designated for a consultant, complete the Request for Individual (Non-OSU) Consultant Services form and send it to Anna Shadley with a statement of the work to be performed.

Conflict of Interest Disclosure - Everyone who conducts human subjects research must also have a current Conflict of Interest Disclosure form on file with the OSU Office of Research. New Conflict of Interest Disclosures must be completed every academic year. The Conflict of Interest Disclosure form is available online. You should login using your OSU user ID and password. If you get a message saying that you don’t have access to the form, you will need to email the Office of Research Helpdesk to request access to the COI Disclosure.

You can go to the PI Portal, click on the Profile tab, then the Training tab to see when you last completed your COI form. If you are not familiar with the PI Portal, please go to page 4 of this document for detailed instructions for accessing this important tool.

Responsive Conduct of Research – All federal-funding agencies require everyone (faculty, staff, students and post-docs) supported on grants to be trained in the Responsible Conduct of Research (RCR). Everyone has to complete CITI training.

  o CITI Training - CITI provides online coursework in human subjects protection, responsible conduct of research, good clinical practices, and export control. Access CITI training. Step-by-step instructions can also be found here. For additional information, please contact Tani Prestage.
  o Some agencies require training in addition to CITI, such as NIH and USDA. The EHE RCR plan lists all of the approved RCR courses on the OSU campus, and trainees can take any one of those courses. Most are in the hard sciences or in the health-related professions. Thus there are already a number of choices for our bench scientists.
As a PI, it is your responsibility to keep records indicating that you and everyone on your team have been trained on the responsible conduct of research.

PI PORTAL

The PI Portal allows you to monitor the progress of your award. The information contained in this portal runs the gamut from effort to expenditures to human subjects protocols to commitments. It is incredibly important to check each month to see if all expenditures and appointments are correct. If there are problems, contact your Sponsored Project Officer (SPO) Anna Shadley or your Human Resources or Fiscal person (see Table 1). Request changes immediately so that additional paperwork is not required. Michael Moses, in the EHE Office of Research can also help you.

PI Portal Projects View

>> Log into the PI Portal and click on the Projects tab for the most comprehensive view of all your projects. You will get an overview of the expenditures, commitments, and the amount left in the budget.

>>Clicking on the actual Title of the project provides Project Details.

>>Click on any of the tabs found in this screen to get comprehensive lists of personnel payments, expenditures, commitments, and payments, and much more.

>>The default view covers one month of data but you can set the start and end dates (set period) to see multiple months.

>>The Documents tab will provide access to your award letter which is required reading! This document provides details about the grant and stipulations that you need to know.
PI Portal Profile View

>>Click on this tab for information about any conflicts of interest that you have reported and information about any human subjects and/or animal protocols that you have submitted.

>>The e-Scan tab allows you to monitor project personnel data for accuracy and completeness. Set the date range and find out the percent of effort and amount budgeted for all people appointed to your projects for each month of the project.