

Huron Improvements + COI Updates 12/11/2024

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1 Summary

A patch was applied on 12/10/2024 at 7pm ET to the Princeton ERA production environment. The changes include:

- Updates to the Huron improvements that were made on 10/25/2024, specifically:
 - Subaward Assurances: Submit Ancillary Review radio button options
 - Subaward Amendments: Updates to questions
 - Change Requests: Introducing hide/show functionality to Change Request activity Q1
- Updates to the Display Team COI Information activity:
 - Additional fields added to this activity

The changes will be incorporated into the main agreements, proposals, and change request guides in the coming weeks.

2 Subaward Updates

2.1 Subaward Assurances: Submit Ancillary Review radio button options

As noted in the Huron Improvement training, the language for the second radio button option began with “The signed subaward initiation or modification form, as applicable...” but it should have started with “The signed subaward assurance form...” since the subaward initiation and modification PDFs no longer exist. With this update the language has been updated to “The signed subaward assurance form...”.

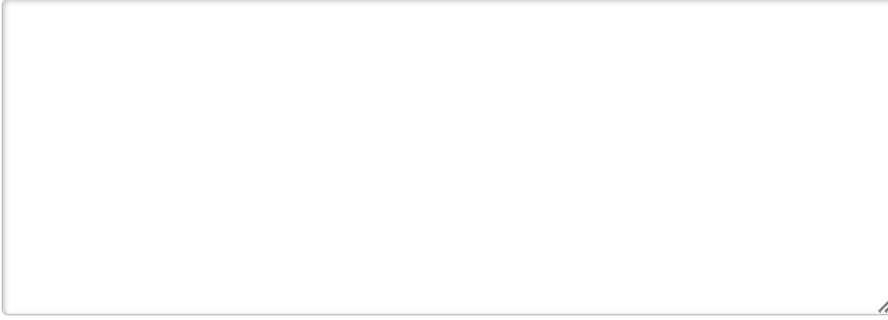
<input type="radio"/> I certify that I have read the above statements and that they are accurate and true to the best of my knowledge.	Submit AR radio button options when the AR Type is "Assurances-Sub Initiation/Modification"
<input type="radio"/> The signed subaward assurance form is uploaded as a Supporting Document to this Ancillary Review. Clear	

<input type="radio"/> I certify that I have read the above statements and that they are accurate and true to the best of my knowledge.	Submit AR radio button options when the AR Type is "Assurances-Sub PI Designee Initiation/Modification"
<input type="radio"/> The signed subaward assurance form and the signed PI Designee form are uploaded as Supporting Documents to this Ancillary Review. Clear	

2.2 Subaward Amendment: New free text box

A new free text box is inserted after question 5, to provide an optional area to explain answers to questions 2-5. All subsequent questions have been renumbered.

6. If necessary, add any relevant information to support the responses above:



2.2.1 Subaward Amendments: Replacement of Restricted Carryforward follow-up questions

If the answer to the restricted carryforward question is yes, 7a displays as follows:

7. * Is this subaward subject to restricted carryforward?

Yes No [Clear](#)

- a. If Subrecipient did not fully spend all funds in the prior budget period, a restriction on the use of such unspent funds will be completed with this amendment. Please review the subrecipient invoices to determine if the subrecipient has an outstanding unspent balance and, if so, provide the amount in the box below:**



3 Change Request Updates

3.1 Hide/show on Q1

Q1 has hide/show functionality to facilitate completing this form—it's faster and easier. This means:

- If “No-Cost Extension” is selected, then the follow-up questions for NCE are shown in Q1.
- If “Pre-award Spending” is selected, then the follow-up questions for pre-award spending are shown in Q1.
- If “Out-of-period Spending” is selected, then the follow-up questions for out-of-period spending are shown in Q1.
- If any other option is selected, then the follow-up free text box is shown in Q1.

This reduces the numbering of all subsequent questions (after Q3) by 4. Of note, the ORPA Approver is now Q4 (was Q8) and the box to submit the request to ORPA is now Q6 (was Q10).

Question	Previous Q #	New Q # after the 12/10/24 7pm ET patch
Request Type	1	1
Change in Scope	2	2
Impacts Subawards	3	3
NCE	4a-e	1a-e (if NCE is selected in 1)
Pre-award	5a-c	1a-c (if pre-award is selected in 1)
Out-of-period spending	6a-c	1a-c (if out-of-period is selected in 1)
Other Approval Requests	7a	1a (if anything other than NCE, preaward, or out-of-period spending is selected in 1)
ORPA Approver	8	4

Add Attachments	9	5
Submit to ORPA	10	6
Reviewed and Advancing Request	11	7
Comments	12	8
Sponsor Approval	13	9
Add Attachments	14	10
PS Grants Updates	15	11
PS Comments	16	12
Change Request completed in PS	17	13

All answers to previously submitted change requests are retained; e.g., if the request was for an NCE and NCE was selected in Q1, then the NCE follow-up questions that were previously answered in Q4a-e are now in Q1a-e. However, if NCE was selected and the NCE questions 4a-e were answered as well as the Q7a “other approval requests” question, then only the follow-up questions for the NCE a-e would be displayed. Click on the Change Request activity for that change request number on the History tab, then click on View More Details to see more information to see how the questions were answered.

3.2 Add Ancillary Review: Comments Emailed to Reviewer

As discussed in the Huron improvement training, the comments added in the Add Ancillary Review screen appear in the email sent to the Ancillary Reviewer, which included not just the current comments, but also any comments sent to this reviewer in the past on this FP in random order, even if the reviewer already completed those old Ancillary Reviews. Now, when the email is sent to the Ancillary Reviewer, it will only contain the Add AR comments for the Ancillary Review that is currently being added. It will not include Add AR comments from past ARs.

4 Display Team COI Information activity changes

- 7 new fields now appear on the Display Team COI Information activity (however, read the important note below).
- Prior to this patch, only the disclosure date and training dates fed.
- The source system is the InfoEd COI module, as it has been since the 11/20/2024 InfoEd launch. Prior to that the data source was the homegrown COI system.
- The feed will continue to be an overnight feed. It is not a real-time feed.
- Maximizing the resulting pop-up window helps with reviewing the information on the screen.
- As a reminder, anyone who has access to the proposal can view the Display Team COI Information activity. Clicking OK on the Display Team COI Information activity records the name of the person and date/time they viewed it on the History tab.

4.1 Important Note: From now until the start of the COI year (1/15/25)

- From now until the start of the COI year (1/15/25):
 - Only use the dates in the “last disclosure date” and “training date” fields on this screen.
 - At InfoEd launch, only the last disclosure and training dates were converted from the old homegrown system to the new InfoEd COI module.
 - Follow the existing processes for COI checking until the start of the new COI year.
 - Ignore all other fields on the Display Team COI Information activity because they may be incomplete and/or reflect inaccurate data since we’re in-between the launch of the InfoEd COI system and the start of the disclosure year.
 - Thank you for your patience!
- After Jan 15, encourage your faculty to complete their disclosure in InfoEd as it will assist in leveraging the new enhancements. Information on understanding the new COI fields will be provided at that time.