CORE (Collaborative for Research Education) offers a variety of courses to help researchers and research administrators manage grants. The courses are offered by various units at the UW responsible for ensuring compliant processes are followed in all phases of the grant life-cycle, from pre- to post-award.

The units offering training through CORE include: Grants and Contract Accounting (GCA), Office of Sponsored Programs (OSP), Office of Research Information Services (ORIS), Research Accounting and Administration (RAA), Management Accounting and Analysis (MAA)

COURSES LISTED BY CATEGORY

GETTING STARTED
COURSES ON FOUNDATION LEVEL RESEARCH ADMINISTRATION TOPICS

OSP 101 Introduction to Research Administration
Ideal for someone new to the profession or as a refresher for someone who has limited experience, the Introduction to Research Administration class is a short survey course designed to help individuals build a foundational body of knowledge within research administration. Coursework focuses on familiarity with the terms, basic concepts, policies and practices within the field of research with a view towards how they are applied from a University of Washington perspective.

GCA 100 Post-Award Financial Administration: Processes, Offices and Best Practices
This course is designed for individuals new to using or administering grant and contract budgets. Participants gain increased knowledge in working with the Grant and Contract Accounting office, including who to contact, the necessary forms, and how and when to complete said forms. The course includes case studies and practice sessions

ORIS 101 SAGE: Creating and Editing eGC1s
(recommended: OSP 101)
SAGE is the university's web-based system for submitting a grant application and routing it electronically for campus review and approval before it is submitted to an external funding source. This course will provide an introduction to the grants process at the UW and will teach participants how to create an eGC1 (electronic Grants and Contracts form 1) in SAGE. A combination of lecture and guided practice is used to provide participants with the opportunity to create, attach documents, and submit an eGC1 for approval.

WORKING WITH BUDGETS
COURSES ON BUILDING AND MANAGING BUDGETS

GCA 100 Post-Award Financial Administration: Processes, Offices and Best Practices
This course is designed for individuals new to using or administering grant and contract budgets. Participants gain increased knowledge in working with the Grant and Contract Accounting office, including who to contact, the necessary forms, and how and when to complete said forms. The course includes case studies and practice sessions

ORIS 103 SAGE Budget
(prerequisites: ORIS 101, OSP 105)
SAGE Budget enables you to create accurate, detailed budgets for your grant and contract proposals. An easy-to-use wizard expedites budget setup; the comprehensive budget worksheet minimizes errors and improves data quality. This course provides participants with an overview of how to use SAGE Budget. A combination of lecture and guided practice will provide participants with experience establishing budget properties, adding object code line item entries, creating sub budgets, and linking budgets to an eGC1

OSP 105 Building a Basic Budget
An introductory course on the budget preparation process for sponsored project applications. It will cover UW and sponsor budgeting terminology; how to find and use the accurate rates to calculate benefits, inflation factors, facilities and administration fees; special considerations for subcontracts; and the principles behind UW budget guidelines and federal regulations. We will learn the concepts and prepare a number of example budgets.
**RAA 100 Grant and Contract Fiscal Administration: Compliance**  
*(recommended: OSP 101)*

This intermediate course is designed for individuals currently using or administering grant and contract budgets. Participants gain increased knowledge of complex policies, rules, regulations, and procedures necessary for post-award administration of grant and contract budgets.

---

**COURSES ON USING MONITORING PROCESSES COMPLIANT WITH FEDERAL LAW AND UW REQUIREMENTS**

---

**MAA 100 Introduction to Grant and Contract Certification (GCCR)**  
**Audience: Individuals new to GCCR reporting**

This course provides participants new to GCCR reporting with the basic tools necessary to understand and monitor the Grant and Contract Certification process which is used for tracking and certifying non faculty salaries and effort. We will cover some basic compliance requirements and discuss how to review and make changes to the GCCR.

**MAA 101 Introduction to Faculty Effort Certification**  
**Audience: FEC Coordinators and others involved in effort reporting**

This class is designed to provide FEC Coordinators and others involved in effort reporting with a general overview of the federal compliance requirements for faculty salary distribution, tracking and effort reporting as well as an understanding the University guidelines applied for meeting these requirements through the FEC process. This is the foundation course for any effort reporting and eFECS system courses.

**MAA 102 Electronic Faculty Effort Certification (eFECS) for FEC Coordinators**  
**Audience: FEC Coordinators/Administrators (prerequisites: MAA 101)**

This class is designed to provide FEC Coordinators and/or Administrators with a comprehensive demonstration of the eFECS application and how it is used in the certification process. It will take the participant through the various screens available in the eFECS Effort Reporting system and describe the features available. Completion of the course will also prepare FEC Coordinators to provide guidance to faculty for doing online certification.

**MAA 205 Modifying an FEC Using Comments and Adjusting Cost Sharing**  
**(prerequisites: MAA 101 and MAA 102)**

This course is designed for FEC coordinators who have a basic knowledge of eFECS. The course addresses how to make changes on the FEC using tools available in the eFECS system. The class will focus on how to use the predefined comments and what type of clarifying information should be added in the free form comment section including documentation of special circumstance. In addition, we will review how to make adjustments to cost sharing using the Adjust/View Cost Share screen.

**MAA 210 Modifying an FEC, Change Outside eFECS and Recertifications**  
**(prerequisites: MAA 101 and MAA 102)**

This course is designed for FEC coordinators who have a basic knowledge of eFECS. The course addresses how to modify an FEC through changing data in other UW systems such as OPUS, My Financial Desktop, FIN and the Cost Share Module, which flow into eFECS. We will review the types of modifications that might be required to adjust an FEC and where and how to make these changes. The class will also review how to recertify an FEC.

**MAA 215 Faculty Effort and Cost Share – Calculate it Right!**  
**(prerequisites: MAA 101 and MAA 102)**

This course is designed for administrative staff who work with faculty effort and cost sharing. The class will focus how effort and cost share cost share calculations using a series of case studies including faculty with salary cap, K Awards, clinical salary, faculty with ADS/ENS, part time faculty with cost sharing and VA faculty with salary cap. Participants should bring scratch paper and a hand held calculator to class.

**MAA 220 Managing Faculty Effort**  
**(prerequisites: MAA 101 and MAA 102)**

This class provides the more advanced FEC Coordinator with a general introduction to compliance requirements and Federal, sponsor and University rules and regulations. Specific attention will be given to changes or reductions in the distribution of effort, shifts in funding sources, no cost extensions and 100% research funded Faculty.

**MAA 225 Using the Tools – Calculators, Worksheets and Reports**  
**(prerequisites: MAA 101 and MAA 102)**

This class will take staff engaged in monitoring effort and adjusting FECs on a tour of available tools. Descriptions of when and how to use calculators, worksheets and reports used in the Faculty Effort Certification process will be followed by demonstrations of each of the following tools: ADS/ENS Calculator, Salary Cap Calculator for Determining Salary Distribution and for Adjusting FECs, Cost Share Calculator, Interim Cost Share Report, Retroactive Salary Adjustment Report, 100% Research Funded Faculty Report and the eFECS Dashboard Report.

**MAA 230 Salary Limitations – K Awards**  
**Audience: Experienced FEC coordinators/Administrators**  
**(prerequisites: MAA 101 and MAA 102)**

This class will review general compliance requirements of Career Development Awards, commonly referred to as K Awards. We will review the types of K Awards and their differences, general compliance guidelines, and some best practices for managing K Awards in the department. In addition, the mechanics of using predefined comments and adding K Award cost share to the FEC will also be covered.
MAA 231 Salary Limitations - Salary Cap
**Audience: Experienced FEC coordinators/Administrators (prerequisites: MAA 101 and MAA 102)**

This class will review general compliance requirements of the DHHS salary cap, normally referred to as the NIH salary cap. We will review how the salary cap is calculated and how the eFECS system determines which cap amount to apply. The class will include how to manage budgets with two salary caps applicable in the same FEC cycle, when to set up a sub-budget and what to do if no sub-budget has been set up. Participants will have the opportunity to explore the tools used to plan for and adjust salary cap cost sharing - the Salary Cap Calculator for Determining Salary Distribution and the Salary Cap Calculator for Adjusting an FEC.

RAA 101 Cost Share Essentials I: What is Cost Share

This course is ideal for anyone who works with cost sharing during the pre- or post-award phases. This 2-session course will provide an overview of the types and sources of cost share, describe the regulatory environment, and identify who is involved and what their responsibilities are. It will review the documentation and tracking processes.

OSP 115 Cost Share Essentials II: Filling out the Addendum (prerequisites: RAA 101)

We will complete the new cost share addendum form, non-FEC cost share report and FEC cost share. A short overview of the Cost Share Module will be provided. This three hour session is a follow-up to RAA 101 (Cost Share Essentials I) and it is held in a computer lab so participants can have hands-on experience with the tools.

OSP 175 Introduction to Export Compliance

This introductory course will cover when an export occurs and how the UW adheres to federal export regulations while undertaking an activity or project. The course is targeted for those in the UW research administration community who are involved with facilitating international research, training or services, collaborations with foreign persons, or have a high volume of shipments from the University to international locations. In addition to discussing the types of exports and associated regulations this training will also review the supporting functions OSP provides throughout an “export-controlled” project lifecycle.

GCA 201 Salary & Cost Transfers and Compliance

This course is designed for department administrators who prepare and approve Salary and other Cost Transfers via MyFD. Course content includes when and why Transfers are to be used, how to document Transfers, how auditors view Transfers, and how to avoid common mistakes with Transfers. The course will also provide information on how Transfers are an audit indicator for Internal Controls.

GCA 202 Direct Billing of F&A Type Costs

This course will cover the definition of Facilities & Administrative (F&A) costs and if and when the costs that are normally treated as F&A can be directly charged to an Award. Included in this course will be information on applicable regulations, how those regulations can be interpreted by departments, how to administer these types of costs, and if such costs can be re-budgeted. The course will also include information audit guidelines and how to prepare and document these costs in the event of an audit.

GCA 203 Preparing for an Audit

This course is designed to discuss transactions that are typically identified for review in an audit and how to prepare for an audit. The course will include information on high risk purchases, principles of allocation of costs, end-of-award purchases, and re-budgeting. Also included in the course will be information provided in the Uniform Guidance and various agency deviations.

MANAGING CONTRACTS

COURSES ON USING RESEARCH CONTRACTS PROCESSES
COMPLIANT WITH FEDERAL LAW AND UW REQUIREMENTS

OSP 125 Contracts Gone Wild

This course is critical for anyone who assists in the development or management of contracts sponsored by federal or state agencies, industry or foundations. Course content covers terminology, the contract review process, roles and responsibilities, and uses case studies to highlight train wrecks that have occurred when contracts go off-track. The course will explore best practices, discuss the pitfalls to the contracts process, and talk about the possible outcomes when contracts are not handled appropriately. It is a ferocious topic!

OSP 145 Subaward Fundamentals for PIs and Departments

This training will discuss roles, responsibilities, and best practices for monitoring financial and research performance of sub-awards. Using case studies to explore the possible challenges which may occur during sub-award monitoring, we will discuss ways to troubleshoot performance problems.

SYSTEMS AND TOOLS

COURSES ON USING UW AND SPONSOR ELECTRONIC TOOLS
FOR GRANT SUBMISSION AND MONITORING

ORIS 101 SAGE: Creating and Editing eGC1s (recommended: OSP 101)

SAGE is the university’s web-based system for submitting a grant application and routing it electronically for campus review and approval before it is submitted to an external funding source. This course will provide an introduction to the grants process at the UW and will teach participants how to create an eGC1 (electronic Grants and Contracts form 1) in SAGE. A combination of lecture and guided practice is used to provide participants with the opportunity to create, attach documents, and submit an eGC1 for approval.

updated 3/17/16

http://www.washington.edu/research/learning
**ORIS 102 SAGE: Creating NIH Proposals in Grant Runner**  
*(prerequisites: ORIS 101)*

Grant Runner enables you to complete Grants.gov applications for certain National Institutes of Health (NIH) funding opportunities directly within SAGE. It integrates the standard government grant application forms (also known as the SF424 Forms) with the UW electronic Grants and Contract (eGC1) application. With the click of a button, the Office of Sponsored Programs (OSP) can electronically submit your application via Grants.gov to the sponsor. This course will introduce experienced SAGE users to Grant Runner. Through a combination of a lecture and guided practice, participants will create a Grant Runner eGC1 while reviewing the stages of the Grant Runner submission process.

**ORIS 103 SAGE Budget**  
*(prerequisites: ORIS 101, OSP 105)*

SAGE Budget enables you to create accurate, detailed budgets for your grant and contract proposals. An easy-to-use wizard expedites budget set-up; the comprehensive budget worksheet minimizes errors and improves data quality. This course provides participants with an overview of how to use SAGE Budget. A combination of lecture and guided practice will provide participants with experience establishing budget properties, adding object code line item entries, creating sub budgets, and linking budgets to an eGC1.

**ORIS 120 FIDS: Disclosing Financial Interests**

Financial Conflict of Interest (GIM 10) disclosures are made using a web-based electronic system called the Financial Interest Disclosure System (FIDS) which is linked to the SAGE system. This course provides investigators and administrators with a basic overview of the UW’s Financial Conflict of Interest Policy (FCOI) and will provide hands-on experience in completing a pending disclosure, creating a new disclosure, and tracking eGC1 compliance in SAGE.

**OSP 155 Grants.gov: The Basics**  
*(prerequisites: ORIS 101 recommended)*

This course is an introduction to and a foundation for understanding the electronic submission process for proposals requesting federal funding. The course is intended for members of the UW research community who may be new to the process of grants administration at the UW or who may need a refresher course. Course content covers the UW approval process, an overview of the Grants.gov submission process and “hands on” practice completing sponsor required forms using a basic NIH proposal model. SAGE 101 is recommended as a prerequisite for this course.