

Checklist for Department

- Collaborate with the PI on Other Support document
- Uses the proper Sponsor template format
- Confirm with PI that all Active and Pending awards are listed
- Collaborate with the PI to identify any in-kind support. For example:
 - Appointments/Positions outside UCSF
 - Materials/Supplies provided by outside source
 - Postdoc/Graduate Students/Visiting Scholars that support PI's research endeavors and have support separate from PI's awards
- Check that budget and dates are updated based on most recent award notice
- Confirm effort is accurate
 - Effort listed for current and future years. Use end of budget period year for the Effort table on Other Support.
 - Effort is not just PAID effort – it is effort committed to the project
 - If effort is decreased by more than 25% of the proposed amount for Key Personnel listed in the NOA – Prior Approval is required. Contact OSR Staff ASAP.
- Review for effort overlap (not more than 11.4 CM for Active for the current year (JIT OS) and next budget period (RPPR OS) to be compliant with the Academic Senate 95% rule
 - If over 11.4 CM, work with PI to determine how to adjust effort to be at or below 11.4CM
 - If effort is decreased by more than 25% of the proposed amount for Key Personnel listed in the NOA – Prior Approval is required. Contact OSR Staff ASAP.
- If over 12 CM months when adding Application under Review and other pending, provide a detailed Overlap statement explaining how effort will be adjusted to be below 12 CM for the current year
- If Other Support includes a K award with complementary effort supporting other research projects, collaborate with the PI on a description of what the effort is supporting to be included in the overlap statement
- Review Project Titles and Summary to identify potential Scientific Overlap
 - If titles or project goals look similar, only one or two words are different in project title or goal
 - Advise to the PI that similar titles/project goals could be indicator to GMS of scientific overlap.
 - Work with PI to include Overlap statement addressing potential scientific/budgetary overlap.
- Review that all sections of the Other Support are present based on Sponsor Policy (for example Active, Pending, In-Kind, Overlap)
 - If PI does not have items for a specific section, section is still listed with “None”
- NIH Only: If there is a foreign appointment, affiliation, or employment with a foreign institution is listed in the in-kind section, provide contract that supports the position (must be translated at PI/Dept expense)
 - Confirm that any budget or effort amounts listed in the in-kind matches any budget or effort listed in the contract
- NIH Only: The PI signature is digital (not typed or ink)
 - Docusign and Certified Adobe Signature are acceptable