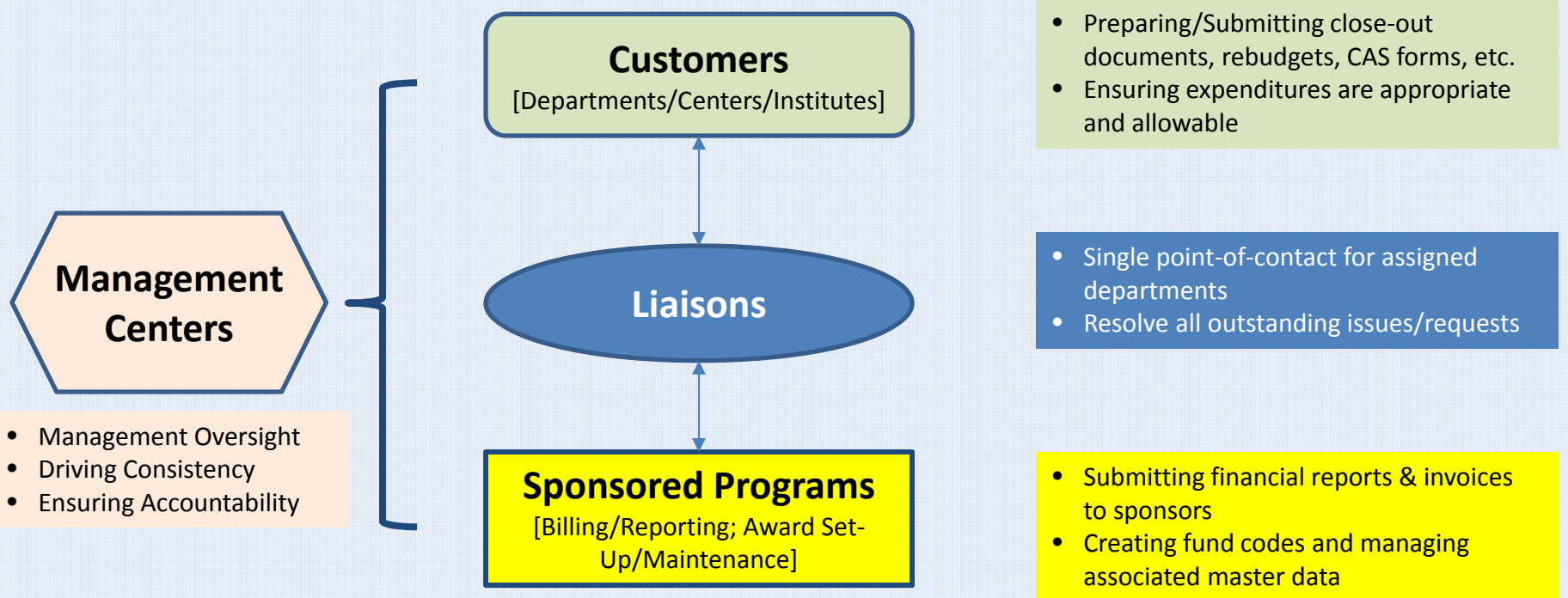


# OFFICE OF SPONSORED PROGRAMS - CUSTOMER SERVICE LIAISON MODEL

**VISION** – the Office of Sponsored Programs will provide timely and effective customer service to all Duke entities and external sponsors, based on dedicated expert staff and advanced technology solutions



## **CUSTOMER SERVICE LIAISON IMPLEMENTATION PLAN**

---

---

The Office of Sponsored Programs is pleased to announce the implementation of a new customer service model to provide support for sponsored projects to all Duke departments, centers, and institutes. To improve both the turnaround time for operational activities, such as submitting financial reports and invoices, as well as the Office's ability to provide timely communication and issue resolution, the institution has supported the creation of five customer service liaison positions within OSP.

Effective immediately, each customer (department, center, or institute) will be assigned to one specific liaison, who will serve as the single point of contact for all needs/issues/concerns for their assigned portfolio. These assignments are based on an analysis of the volume and complexity of each unit's post-award activity, and will be re-evaluated periodically to ensure all customers are receiving high-quality and timely service from their liaison. This re-evaluation will be based both on data analysis of workload and customer feedback.

Most requests to OSP from customers should now be directed to the assigned liaison<sup>1</sup>. The response timeliness goal under this new liaison model is three business days – each inquiry from a customer will receive a response within three business days. The response will either be a confirmation of the resolution or a status update on what is required for a resolution and the next steps needed. This response window will be monitored internally, and feedback regarding this performance should be directed to Nate Martinez-Wayman, OSP Director. *There will always be circumstances that require a same- or next-day response. These exceptional situations should be submitted to your liaison first by phone, followed by an email with "URGENT" in the subject line.*

Liaisons will contact customers to schedule introductory meetings and discuss how they can best provide support. There will be different support needs, and it is OSP's goal to meet all reasonable needs based on availability of resources. The baseline expectations for the service provided by the liaisons are outlined in the liaison job summary excerpted on the following page.

---

<sup>1</sup> Questions related to OSP's payments of subaward invoices should be sent to [ospsubcontractmgmt@duke.edu](mailto:ospsubcontractmgmt@duke.edu). ECRT and effort-related questions should continue to be submitted to [ecrt-support@duke.edu](mailto:ecrt-support@duke.edu). Close-out documents are still sent to OSP's general address, at [sponsoredprograms@duke.edu](mailto:sponsoredprograms@duke.edu). Sponsor requests related to audits should go to Mary Johnson ([mary.johnson@duke.edu](mailto:mary.johnson@duke.edu)). All other inquiries should be directed to liaisons.

# Office of Sponsored Programs

## Customer Service Liaisons Job Summary

This position will serve as the primary point of contact for post-award research administration issues for schools and departments across Duke University, working directly with school and departmental administrators, management center leadership and administrative units, faculty, and colleagues within other central administrative units, to promote the efficient and effective administration of research within those schools and departments. The liaison will also work with external granting agencies as needed to ensure optimal research administration outcomes. The support provided to customers will include serving as the primary contact for all post-award issues, including billing and reporting questions, rebudget requests, CAS-related issues, questions related to other forms and equipment purchases, and training. This position will share accountability for the desired outcomes with their customers in the schools and departments to which they are assigned.

### Specific Responsibilities/Duties/Functions

Answer inquiries from customers (schools/depts/ctr) regarding master data, billing/reporting, closeouts, rebudgets/CAS requests, etc. (scope does not include subawards or effort), providing replies within 3 business days

Perform select OSP functions, including but not limited to rebudget/CAS requests, relinquishing statements, equipment screening forms, A/R invoice uploads, etc.

Respond to sponsor inquiries; resolve late invoicing/reporting issues

Assist with code clean-up for restricted codes that have ended (20x-38x codes), working with customers to resolve close-out documentation issues, overdrafts, outstanding CAS, salary cap, etc.

Assist customers in identifying training needs for RA staff, coordinate and/or provide the training as appropriate

Other support as requested by the schools and departments assigned to the position, and as approved by the leadership of the Office of Sponsored Programs and related management center leadership

## Duke University Office of Sponsored Programs

### If I need...Who do I ask?

<b>Form/Document/Request/Action</b>	<b>Send To...</b>
Submitting Close-Out Documents	OSP general account <sup>1</sup>
Subaward Invoicing/Payments Questions	Subaward account <sup>2</sup>
ECRT & Effort-Related Questions	ECRT account <sup>3</sup>
Audit Requests from Sponsors	Mary Johnson <sup>4</sup>
Status of Invoice Submission to Sponsor	Liaison
Status of Financial Report Submission to Sponsor	Liaison
Correction Needed to Project Master Data	Liaison
Status of Update to Plan from Rebudgeting or CAS Requests	Liaison
Status of F&A Adjustments	Liaison
Issues Related to Close-Out after Submission of Documents	Liaison
Request to Physically Close a Code	Liaison
Anything Else	Liaison

[1 - sponsoredprograms@duke.edu](mailto:sponsoredprograms@duke.edu)

[2 - ospsubcontractmgmt@duke.edu](mailto:ospsubcontractmgmt@duke.edu)

[3 - ecrt-support@duke.edu](mailto:ecrt-support@duke.edu)

[4 - mary.johnson@duke.edu](mailto:mary.johnson@duke.edu)