

MIDWEST AREA
STANDARD OPERATING PROCEDURES
MANUAL

REMINDER CALENDAR

Created by
Midwest Area Council for Office Professionals

REMINDER CALENDAR

Note: Tasks below are not necessarily done by each unit/location. Check with your AO (Administrative Officer) or RL (Research Leader) if you are unsure.

Weekly or very regular basis

Review ARS-230s for upcoming departure dates, changes in visa status, etc., make necessary changes or reports.

Back-up your computer.

Monitor supplies and order as needed.

Reconcile credit card transactions within Access Online (AXOL) and CATS. Ensure a report is sent to appropriate personnel.

Send any outside recognition received by employees to Area Office.

Bi-weekly

T&As

- Send e-mail to unit informing them of submission deadline for timesheets.
- Send e-mail to supervisors informing them of deadline for certifying timesheets and approving leave requests.

Update REE Directory or send information to person responsible for updates.

Monthly

When appropriate, monitor OSQR (Office of Scientific Quality Review) for updated announcements and scheduled CRIS project completion. Reference following website: www.ars.usda.gov/research/docs.htm?docid=1286

Training

- Monitor required AgLearn Training

ARIS

- Monitor replacement, extension, or termination dates for research projects. Request appropriate paperwork from scientists (SYs) and completed ARIS action.
- Monitor progress of manuscripts. Run Detail by Author reports for SYs and update citation information as needed. Update authors' lists of publications.

Review Status of Funds as needed or required.

Quarterly

January

Travel

- Check expiration dates of travelers' passports. If a passport needs renewal, begin the process approximately 75 days before expiration date; days may vary depending upon when the traveler will next leave the country.

Go through files, disposing of materials that may be discarded, and do a general house-cleaning of computer files and general files.

February

March

ARIS

- Spring Clean-up on Incoming Agreements.

ARMP

- Watch for letter from Area Office to initiate the Annual Resource Management Plan (ARMP) process.
- Compile data for ARMP process. Gather information from SYs for anticipated needs of equipment, travel, and personnel. Prepare initial draft for RL review.

Performance

- Make sure all employees have had mid-term performance review. Send appropriate documentation to AO.

May

ARIS

- Next FY Guideline Dollars file opens for permanent fund transfer actions.

Grants and Proposals

- National Science Foundation (NSF) grant proposals announced.

June

ARIS

- Post-doc application process opens for data entry in ARIS.

Extramural Agreements

- Paperwork to extend projects, add current year funds, and/or extend time in ARIS is due to the Area Extramural Agreement Specialist, by June 30.

Annual Reports

- Watch for announcement from Area Program Analyst to initiate AD-421 Annual Report process.
- Send Detail by Author reports to SYs to update publications

Performance

- All employees must have a performance plan in place 90 days before end of appraisal period (September 30) to be considered for a full performance cycle.

July

Ensure scientists have completed REE-101, Outside Activities Form, and have submitted to Area Ethics Officer.

ARIS

- Final day for Permanent or Temporary FY fund transfers between D-type projects and for HQ-funded post-docs in ARIS.
- Post-doc fund transfers to be included in next FY ARMPS are due (person has to be on-board before funds can be transferred).

Annual Reports

- Prepare and enter AD-421 Annual Reports into ARIS.

August

Grants and Proposals

- Office of International Cooperative Development (OICD) Scientific Cooperation proposals are due;
- Binational Agricultural Research and Development (BARD) proposals announced.

August (con't)

ARMP

- Final ARMP guidelines dollars available for printing from briefing packet. Final ARMP is due in mid-August to Area Office.

Performance

- Send Detail by Author reports to SYs to update publications.
- Executive Assistant to MWA Associate Director will determine August cutoff date for 115s to be entered into ARIS in order to be included for SY performance documentation.

September

Performance

- Prepare AD435P for all employees and send electronically to supervisors.
- Distribute instructions and deadlines for completion of all paperwork associated with performance cycle to unit.

RSA

- Prepare requisition AD-700 for Research Support Agreements (RSA). Update related documentation.

Travel

- Prepare new files for travel authorizations and vouchers and other fiscal year filing.

Personnel

- Telework Agreements

Prepare Collaborator SF-52s and obtain appropriate paperwork from collaborator for next fiscal year.

October

450 Financial Disclosure Reviews.

Delegation of Authority forms to appropriate person

ARIS

- Update Mission Statement
- Fall Cleanup of Incoming Agreements

Performance

- Submit documentation of all employees' accomplishments, appraisal, and award forms via proper channels to AO (if at Center, submit through Center Director).
- Prepare and submit new FY performance plans and Individual Development Plans (IDP) for all employees. Plans must be in place 90 days to be considered a full performance appraisal period.
- Funded post-docs announced.

November

Update investigator/SY time on projects in ARIS to agree with ARMP.

December

Prepare new files for the coming year for calendar year files.