NIH DMS Policy Updates

September 21, 2023
Updated DMS Budgeting Instructions

- Effective October 5, 2023: NIH will no longer require the use of the single DMS cost line item (NOT-OD-23-161)
  - DMS costs must be requested in the appropriate cost category, e.g., personnel, equipment, supplies, and other expenses, following the instructions for the R&R Budget Form or PHS 398 Modular Budget Form, as applicable
    - Validator of inclusion of the single line item will be decommissioned shortly and updates to the NIH How to Apply – Application Guide will be published prior to October 5
  - NIH will still require applicants to specify estimated DMS cost details within the “Budget Justification” attachment of the R&R Budget Form or “Additional Narrative Justification” attachment of the PHS 398 Modular Budget Form
- Harvard NIH DMSP FAQ has been updated with the new information
- Updated Budgeting and Application Tip Sheet will be posted on OVPR’s Federal Funders’ Data Management Policies page shortly
Initial Observations – DMS Plans

- Not indicating which data goes where, for example, not using an established repository.
- Vague descriptions of which data will be shared, vague reasons for not sharing.
- Conflicting information (something described in one element is contradicted in another).
- Plans that used any template or included tables/lists were generally more successful.
- FDP Pilot Leads will be working with NIH Program Staff to continue to assess information in the plans, to better inform the future phases of the pilot and compliance activities.

*With thanks to NCI and NICHD for providing initial observations of plans received by their ICs. This data is anecdotal, based on preliminary reviews of DMS plans.*
Resources & Services

- List of about 10 Harvard resources and services for the NIH Data Management and Sharing Policy was sent to the project manager of the Research Support Website – stay tuned for more!

- Reminder about available resources:
  - Harvard NIH DMS Policy FAQ
    - Includes Harvard-focused answers based on current NIH guidance as well as school-specific contacts and subject matter experts
  - Harvard NIH DMSP Briefing Sheet
    - An overview and history of the Policy, responsibilities and resources
  - Harvard NIH DMSP Budgeting and Application Instructions – Tip Sheet
    - Guidance focused towards Principal Investigators and grant managers working together to complete an application, which includes the newly required DMSP
Policy Tip Sheets – Updates

- **NIH DMSP Budgeting and Application Tip Sheet** - look for version 3 soon!
  - This tip sheet provides guidance for Principal Investigators and grant managers working together to complete an application, which includes the newly required DMS Plan

- **NIH DMSP Central Reviewer Tip Sheet** - look for version 1 to be posted soon!
  - Goal of this document is to provide University guidance on best practices for central reviewers
    - During the proposal stage, assumes that the PI has submitted the proposal materials for review within the deadline set by the central reviewing office
    - Guidance for JIT and Award stage provided based on our understanding of what we can expect from NIH at these stages
Fall 2023 Data Lifecycle Training

**Plan & Design**
- **September 19**
  Managing Research Data Efficiently
- **October 4**
  Onboarding: Procedures for Research Consistency
- **October 17**
  Research Management with Open Science Framework
- **October 31**
  Data Horror Stories: Avoid the Nightmare
- **November 7**
  Writing a Data Management Plan with DMPTool

**Collect & Analyze**
- **September 6**
  Intro to O2
- **September 20**
  O2 Portal: Simplifying the Interaction & Experience of Using an HPC Environment
- **September 27**
  Intro to MATLAB
- **October 18**
  Optimizing O2 Jobs
- **November 8**
  Intro to Python
- **December 13**
  Data Cleaning with OpenRefine

**Store & Evaluate**
- **September 26**
  Introduction to the General Records Schedule
- **October 10**
  Managing Your Paper Records
- **October 11**
  The When, Where, and How of Data Storage
- **December 5**
  Managing Your Electronic Records
- **December 6**
  Keeping Data Safe and Secure

**Share & Publish**
- **September 20**
  Publication Perfect I
- **September 27**
  Making Code and Software Open: Connecting GitHub and Harvard Dataverse
- **October 18**
  Publication Perfect II
- **November 15**
  Securely Managing and Publishing Sensitive Data
- **November 15**
  Rmarkdown: Reproducible Reports

Learn More & Register: bit.ly/rdmwg-calendar
Next Steps

- Second survey to gauge researchers’ awareness, concerns, and needs one year into the policy (targeting distribution in late Fall)

- Monitor JIT/Award stage feedback on submitted DMS Plans and adjust guidance and processes accordingly
  - Please share feedback received with your area's representative to the university-wide working group to help with this effort