Efficient Spending Policy: Guidance on Conferences and Virtual Events During COVID-19 Emergency
May 27, 2020

Due to the COVID-19 emergency, many NIH-hosted and non-NIH-hosted events have been cancelled or converted to virtual meetings. Below is a collection of guidance covering the different parts of the Efficient Spending Policy, which have been vetted through the Office of Acquisition and Logistics Management (OALM), the Office of Financial Management (OFM), and the Office of Extramural Research (OER):

NIH HOSTED AND CO-SPONSORED EVENTS

To minimize the impact of cancellations on conferences and travel, the following are best practices that we encourage all ICs and Offices to think forward about those potential issues for future events and to consider:

(1) Use of NIHCATSII for conference support service and incorporating cancellation and force majeure clauses;
(2) Use of invitational travel orders (via GSA city-pair contracts) so that travel is fully refundable; and
(3) Use of additional contract instruments for honoraria speaker/presenter compensation in the event of cancellation.

- Previously approved NIH-hosted events that have been converted to virtual events do not require further approvals. If there are any travel expenses, reporting at the appropriate thresholds i.e. Scientific – above $30,000; non-Scientific – above $25,000, is still required.

- Previously approved NIH-hosted events that are to be postponed to a later date but remain as in-person events do not need to be approved again, unless added costs will exceed the next approval threshold. If this is the case, then the previous pre-approval and new costs need to be submitted to the next threshold approving official by sending a request to efficientspendingpolicy@mail.nih.gov. All reporting requirements remain.

- Future NIH-hosted virtual events with no travel expenses are not considered conferences according to the Efficient Spending Policy and therefore no approval or reporting is required for such events.

- Future NIH-hosted in-person events with travel expenses still require pre-approval and any reporting at the appropriate thresholds.

NON-NIH HOSTED EVENTS & TRAVEL

VIRTUAL MEETINGS

Non-NIH Hosted Conference Travel Virtual Meetings **no longer require pre-approvals.** However, if there are any costs associated with the meeting (registration fees), you are still required to report the meeting to OFM. You will still request an ID number and enter your attendance and costs associated with the meeting in the OFM Travel SharePoint Site, for tracking and year end Cures Act Reporting.

NEW VIRTUAL MEETINGS

1. **Do not report newly organized virtual meetings with no costs,** to OFM. This is no longer required.
2. **Report new virtual meetings with costs** (registration fees), to OFM using the Travel SharePoint Site.
   i. Request an ID number.
   ii. Note on the ID Request Form, if the conference is being held virtually, via a **new Yes/No** dropdown field.
   iii. Enter your attendance and cost numbers under the assigned ID number.
   iv. The attendee/cost request status will be updated to **"Virtual"** in the OFM Travel System.

ALREADY REPORTED FACE-TO-FACE MEETINGS THAT ARE NOW VIRTUAL

1. **Virtual Meetings with No Costs**:
    i. Report the notification of change to OFM, using the automated system (CPRV Request).
    ii. Note in the comments section on the Notification of Change Form: **Virtual Meeting with no costs**.
    iii. You will receive an automated email requesting revised costs.
    iv. Submit revised costs (zeros).
    v. The figures will be updated in the system as a new request and the status will be set to "**Virtual**".
    vi. All the requests status related to this virtual meeting will be updated to **"Not Applicable-Virtual** in the system to keep the history of the cost and attendee details.

2. **Virtual Meetings with Costs**:
    i. Report the notification of change to OFM, using the automated system (CPRV Request).
    ii. Note in the comments section on the Notification of Change Form: **Virtual meeting with costs (registration fees)**.
    iii. You will receive an automated email requesting revised costs.
    iv. Submit revised costs.
    v. The figures will be updated in the system as a new request and the status will be set to "**Virtual**".
    vi. All the requests status related to this virtual meeting will be updated to **"Not Applicable-Virtual** in the system to keep the history of the cost and attendee details.

CANCELLATIONS: Report cancelled meetings, using the Cancel/Postpone/Rescheduled/Virtual (CPRV) Request Change Notification Form, located on the OFM Travel SharePoint Site Home Page. Make sure you are **100%** positive the meeting is cancelled, before reporting**.** OFM is seeing numerous situations, where the cancelled meeting is rescheduled for 2020, or postponed with dates TBD. These situations should not be reported as cancellations.

POSTPONEMENTS: Report postponed meetings, using the Cancel/Postpone/Rescheduled/Virtual (CPRV) Request Change Notification Form, located on the OFM Travel SharePoint Site Home Page. **Once you become aware the postponed meeting is rescheduled or cancelled, you must go into your original notification of change entry and edit the form, noting the new changes.**

RESCHEDULED: Report rescheduled meetings, using the Cancel/Postpone/Rescheduled/Virtual (CPRV) Request Change Notification Form, located on the OFM Travel SharePoint Site Home Page. Make sure to report any location and date changes when submitting information for a rescheduled conference. The original conference ID information will be corrected in the system to reflect the reported changes. **Do not enter a request for a new ID number.** This will lead to duplications. Use "Rescheduled" for meetings that will still occur in the 2020 calendar year. If the meeting is rescheduled to take place in 2021, it should be reported as cancelled.

The Cancel/Postpone/Rescheduled/Virtual (CPRV) Request Change Notification Form can be found using the following link: https://ofmsps.od.nih.gov/ofmconferences/SitePages/Home.aspx#/cancelConference/add

It is imperative that you report all Non-NIH Hosted Conference changes to OFM. The OFM Travel Tracking System data is used for end of the year 21st Century Cures Act mandated reporting. All information entered into the OFM Travel System should be your **best estimate** of Non-NIH Hosted Conference travel attendance and costs, for your IC and/or Office.

CONFERENCE GRANTS AND COOPERATIVE AGREEMENTS

NIH applicants and recipients of conference grants can find COVID-19 information in NIH frequently asked questions and answers here.

POINTS OF CONTACT FOR THE EFFICIENT SPENDING POLICY AND CURES ACT REPORTING

All other components of the Efficient Spending Policy remains in force, including printing requirements and obtaining pre-approval for all promotional items.

Questions regarding NIH Hosted, Sponsored, or Co-Sponsored conferences (via contract), promotional items, and printing should be directed to EfficientSpendingPolicy@nih.gov.

Questions regarding attendance at non-HHS Hosted or Sponsored conferences and Food and Beverages should be directed to Office of Financial Management (OFM) Travel at OFMTravel@od.nih.gov.

Questions regarding conference grants and cooperative agreements should be directed to the Office of Extramural Research (OER) Conference Grant Approval Coordinator at R131@mail.nih.gov.

Questions regarding the reporting of conferences should be directed to NIHConferenceReporting@mail.nih.gov.