

# RESEARCH ADMINISTRATION

**Extramural Fund Management**

**July 13, 2017**

# Today's Topics

- UCPath: Payroll Expense Transfer
- PAMS Update
- ERS Update

# UCPath: Payroll Expense Transfers

Yoon Lee

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# UCPath Go Live

- December 2017 remains go-live target
- Transition readiness in process
  - Campus Advisory Group have been attending transition readiness workshop since October 2016
  - Assessing each unit's business processes, plan, and execute relevant activities to ensure successful transition to UCPath
- Testing in process
  - EFM participated in salary cost transfers testing through Integrated Testing Cycle 2
  - Integration testing Cycle 3 will be performed from July 17, 2017 through September 11, 2017
  - User Acceptance Testing is scheduled from September 25, 2017 through November 3, 2017

# Payroll Expense Transfers: Pre-UCPath Go Live Data



- UCLA elected not to convert payroll data from PPS to UCPath.
  
- After UCPath Go Live, UCLA will maintain Payroll Personnel System (PPS) for the limited time.
  
- While PPS is maintained,
  - PPS current process to update the Financial System and ERS will be supported.
  - WebPET (Payroll Expense Transfers) will be supported.
  
- Currently UCLA plans to discontinue PPS as of July 1, 2018.

# Payroll Expense Transfers: Pre-UCPath Go Live Data

## **After UCPath Go Live, transfer of payroll expenses processed in PPS while PPS is supported:**

- Transfer payroll expenses through WebPET
- High risk cost transfers will be routed to EFM for approval
- Payroll expense transfers will be processed through pay compute cycle and posted to general ledger (For high risk cost transfers, once approved by EFM)
- Downstream applications (e.g. Effort Reporting System) will be updated via the same process as of today

# Payroll Expense Transfers: Pre-UCPath Go Live Data

## **After UCPath Go Live, transfer of payroll expenses processed in PPS after PPS support discontinues:**

- As PPS support discontinues, WebPET will no longer be available to transfer payroll expenses.
- If payroll expense transfer is needed after PPS support discontinues, it needs to be processed through a financial journal bypassing payroll sub-ledger.
  - No clear audit trails for payroll expense transfers.
  - Impact to downstream applications consuming payroll sub-ledger data (e.g. Effort Reporting System).
  - Related benefits, GAEL, TIF, etc. need to be manually calculated to be included in a financial journal.

# Required Actions by the Department

- Continue to review payroll expenses every month and upon discovery of errors, process payroll expense transfers through WebPET timely.
- If there are any awards where monthly reconciliation has not been completed, review payroll expenses now and process payroll expense transfers as soon as errors are discovered.
- Target to complete all transfers of payroll expenses processed in PPS before UCPATH Go-Live: by January 1, 2018.
  - Only payroll expenses processed in December 2017 should be left for review after UCPATH Go-Live.



# EFM Procedure

- EFM standard procedure will be not to accept pre-UCPath go live payroll expense transfers debiting to sponsored project funds after PPS support discontinues (currently scheduled to be July 1, 2018).
- Department will be responsible for finding unrestricted source of funding for these payroll expenses.
- If payroll expenses need to be transferred off from sponsored project funds after PPS support discontinues, EFM will require the department to submit following:
  - Comprehensive explanation of circumstances why payroll expense errors could not be corrected timely in addition to standard questions for cost transfers, signed by the PI and the department fund manager.
  - Detailed action plan on how the department will ensure manual adjustments to all affected downstream system reports
    - e.g. For effort reports, a complete list of all employees whose salaries are transferred including affected effort report periods, pay rate, pay distribution before and after, etc. )
  - Endorsement of Department CFO, CAO, Director, or an equivalent position on the explanation and action plan.

# **Post Award Management System (PAMS)**

Jennifer Aguilar

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# RAPID Closeout Packet Upload Tool

- Effective July 1, 2017, the RAPID closeout packet upload tool in the ORA portal is no longer available
- All RAPID closeout packets along with supporting documentation are to be submitted via PAMS
- This change will help the department:
  - View real-time status of closeout packets in PAMS by using the approval workflow
  - Easily locate closeout packets and documents submitted in PAMS

# PAMS Pilot

- Pilot users actively provided extensive feedback to enhance the system
- The PAMS Team made system improvements and documented wide-ranging list of enhancements
- In order to focus on the development of these enhancements, effective July 1, 2017, pilot has stopped
- Completing closeout packets in PAMS is temporarily not available during this development phase
- Campus will be notified once system is back for all to use
- All other functionalities in PAMS will continue to be available

# Thank you!

## Pilot Users Departments

ANDERSON GRAD SCH OF MANAGEMENT	MICROBIOLOGY, IMMUNO & MOLECULAR GENETICS
ANESTHESIOLOGY & PERIOPERATIVE MEDICINE	NEUROBIOLOGY
ARCHITECTURE & URBAN DESIGN DEPARTMENT	NEUROLOGY
BIOMATHEMATICS	NEUROLOGY-ADMINISTRATION
CIVIL & ENVIRONMENTAL ENGINEERING	OBSTETRICS & GYNECOLOGY
CNTR FOR HEALTH POLICY RESEARCH	PATHOLOGY DEPARTMENT ADMINISTRATION
COMPUTER SCIENCE	PEDIATRICS
COTSEN INSTITUTE OF ARCHAEOLOGY	PHYSICS & ASTRONOMY
DEAN, SCHOOL OF THE ARTS	PHYSIOLOGY
DEANS OFFICE-SCHOOL OF MEDICINE	POLITICAL SCIENCE
DEPARTMENT OF MEDICINE	PSYCHIATRY/BIOBEHAVIORAL SCI
DEPT OF WORLD ARTS & CULTURES/DANCE	RADIATION ONCOLOGY
EMERGENCY MEDICINE	SEMEL INSTITUTE
ENVIRONMENTAL HEALTH SCIENCES	SOCIAL SCIENCES GRANT SUPPORT
EPIDEMIOLOGY	STATISTICS
FOWLER MUSEUM AT UCLA	SURGERY-CHAIRMAN
HEALTH POLICY AND MANAGEMENT	SYSTEMWIDE ACCOUNTS(MISC)
LAW	TECHNOLOGY DEVELOPMENT GROUP
MECHANICAL & AEROSPACE ENGINEER	UCLA INTERNATIONAL INSTITUTE

# PAMS Training

- In-Person Training Session:
  - Wednesday, July 19<sup>th</sup> 9-11am in the Wilshire-Glendon building
  - To register, complete the Doodle poll:  
<http://doodle.com/poll/5yr96mf9hmavi9nw>

# Resources

- PAMS Help Team
  - (310) 794-0008, [pamshelp@research.ucla.edu](mailto:pamshelp@research.ucla.edu)
  - Questions on access to PAMS
  
- Visit the [PAMS](#) website for more information including:
  - Training materials, Quick Guides, Videos

# Effort Reporting

Connie Brown

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# Effort Reporting Statistics

## As of July 12, 2017

- Fall 2016 & Winter 2017 (7/31/17 Deadline)
  - Generated: 10,186
  - Certified: 5,245
  - Open: 4,941
  - On-Time Rate – 51%
  
- Spring 2006 to Summer 2016 (Prior Quarters)
  - Generated: 257,219
  - Certified: 256,271
  - Open: 948
  - Current Rate – 99%
  
- Spring'06 - Winter'17 (All Quarters Rate)
  - 97% Certified

# Past Due and Current Due Reports

- Notification automatically sent to departments on the 15th the month
  - Current Due Reports included until 7/31/17

## Past Due Effort Reports for [REDACTED] (as of 6/14/2017)

Row	Emp_ID	Name	Is PI?	Period	Appointment Type	Status	Certification Due Date	Days Overdue
1	[REDACTED]	[REDACTED]		Winter 16	Non-academics	Exception	7/29/2016	321
2	[REDACTED]	[REDACTED]		Summer 16	Non-academics	Open	2/7/2017	128
3	[REDACTED]	[REDACTED]	Y	Summer 16	Academic-9/12	Open-Reissued	2/7/2017	128
4	[REDACTED]	[REDACTED]	Y	Spring 12	Academic-11/12	Certified/AdjustReqd	2/7/2013	1589
5	[REDACTED]	[REDACTED]	Y	Summer 16	Academic-9/12	Open-Reissued	2/7/2017	128
6	[REDACTED]	[REDACTED]		Summer 16	Academic-11/12	Certified/AdjustReqd	2/7/2017	128

## Current Due Effort Reports for [REDACTED] (as of 6/14/2017)

Row	Emp_ID	Name	Is PI?	Period	Appointment Type	Status	Certification Due Date	Days Remaining
1	[REDACTED]	[REDACTED]		Fall 16	Academic-11/12	Open	7/31/2017	46
2	[REDACTED]	[REDACTED]		Winter 17	Academic-11/12	Open	7/31/2017	46
3	[REDACTED]	[REDACTED]	Y	Fall 16	Academic-9/12	Open	7/31/2017	46
4	[REDACTED]	[REDACTED]	Y	Winter 17	Academic-9/12	Open	7/31/2017	46
5	[REDACTED]	[REDACTED]		Fall 16	Non-academics	Open	7/31/2017	46
6	[REDACTED]	[REDACTED]		Winter 17	Non-academics	Open	7/31/2017	46

# Departments with 100%

As of February 7, 2017 Deadline

DEPT CODE	DEPARTMENT	DEPT CODE	DEPARTMENT	DEPT CODE	DEPARTMENT
0033	ARCHITECTURE & URBAN DESIGN DE	1205	SOCIOLOGY	1717	SURGERY-PLASTIC
0115	DEAN, SEAS	1210	SOCIAL SCI COMPUTING	1718	SURGERY-CARDIOTHORACIC
0140	NANOSCALE MULTIFERROIC SYSTEMS	1220	CENTER FOR AFRICAN STUDIES	1720	SURGERY-LIVER AND PANC. TRANSP
0142	CENTER OF FUNCTION ACCEL NANOM	1230	CENTER FOR WORLD LANGUAGES	1725	SURGERY-VASCULAR
0145	COMPUTER SCIENCE	1235	COTSEN INSTITUTE OF ARCHAEOLOG	1760	BRAIN RESEARCH INSTITUTE
0157	THE WESTERN INSTI FOR NANOELEC	1240	ASIA INSTITUTE ADMINISTRATION	1915	PUBLIC HEALTH
0159	INSTITUTE FOR TECHNOLOGY ADVAN	1245	INTERREGIONAL PROGRAMS	1916	CANCER PREVENTION & CNTRL RESE
0190	MATERIALS SCIENCE & ENGR	1250	CNTR FOR LATIN AMERICAN STUDIE	1918	CNTR FOR HEALTH POLICY RESEARC
0285	INFORMATION STUDIES	1269	CTR FOR SOUTHEAST ASIAN STUDIE	1920	COMMUNITY HEALTH SCIENCES
0464	FILM, TELEVISION & DIGITAL MED	1295	SOCIAL SCIENCES GRANT SUPPORT	1930	ENVIRONMENTAL HEALTH SCIENCES
0505	INSTITUTE OF PLASMA SCI & TECH	1400	DEANS OFFICE-SCHOOL OF MEDICIN	1935	EPIDEMIOLOGY
0513	EDUCATIONAL INITIATIVES	1430	NEUROBIOLOGY	2040	CRUMP INSTITUTE FOR MOLECULAR
0515	COLLEGE ACADEMIC COUNSELING	1445	BIOLOGICAL CHEMISTRY	2060	ASIAN AMERICAN STUDIES CENTER
0518	CALIF NANOSYSTEMS INSTITUTE	1460	BIOMATHEMATICS	2090	INST OF GEOPHYSICS & PLANETARY
0519	UNDERGRADUATE RESEARCH CENTERS	1505	PHYSIOLOGY	2095	JOINT INSTI REG EARTH SYST SCI
0521	CTR FOR ENVTL IMPACTS OF NANOT	1554	MEDICINE-DERMATOLOGY	2105	INSTITUTE FOR RES ON LABOR AND
0523	ACADEMIC ADVANCEMENT PROGRAM	1558	MEDICINE-GERIATRICS	2112	JONSSON CANCER CENTER
0650	LINGUISTICS	1559	MEDICINE-HEMATOLOGY-ONCOLOGY	2120	INSTITUTE FOR GENOMICS AND PRO
0665	NR EASTERN LANGS & CULTURES	1563	MEDICINE-RHEUMATOLOGY	2135	MOLECULAR BIOLOGY INSTITUTE
0680	ASIAN LANGUAGES & CULTURES	1567	MEDICINE-SAN FERNANDO VALLEY P	2155	INST OF ENVIRONMENT AND SUSTAI
0710	SCANDINAVIAN SECTION	1570	MEDICINE-CENTER FOR HUMAN NUTR	2200	RESEARCH TECHNOLOGY GROUP
0740	SPANISH AND PORTUGUESE	1573	CTR FOR HEALTH PROMO & DISEASE	2301	MICROBIOLOGY, IMMUNO & MOLECU
0755	DEPARTMENT OF COMMUNICATION ST	1574	MEDICINE-NANO MEDICINE	2890	OFFICE OF EMERGENCY PREPAREDNE
0757	INST FOR PURE & APPLIED MATHEM	1581	NEUROLOGY-LONI	3022	INSTITUTE FOR SOCIETY AND GENE
0830	ECOLOGY AND EVOLUTIONARY BIOLO	1627	PATHOLOGY LABORATORY MEDICINE	4807	BRUIN CORPS
0875	PSYCHOLOGY	1639	PEDIATRICS-PAIN PROGRAM	4954	OID CENTER FOR EDUCATIONAL ASS
0910	DUCHENNE MUSCULAR DYSTROPHY RE	1641	PEDIATRICS-ALLERGY/IMMUNOLOGY	5300	GRADUATE DIVISION
1010	MATHEMATICS	1655	PSYCHIATRY/BIOBEHAVIORAL SCI	5400	GENERAL LIBRARY
1181	SCH OF PUBLIC AFRS SCH WIDE/PR	1703	SURGERY - THORACIC SURGERY	5625	UNEX-EDUCATION
1182	PUBLIC POLICY	1705	ORTHOPEDIC SURGERY		
1190	POLITICAL SCIENCE	1711	SURGERY-GENERAL	<b>Count</b>	<b>91</b>

# ERS Reminders

- Fall 2016 & Winter 2017 Effort Reports Deadline
  - Monday, July 31, 2017 (until mid-night)
- ERS Notifications
  - To subscribe: Send an e-mail to: [ers-subscribe@lists.ucla.edu](mailto:ers-subscribe@lists.ucla.edu) or [ora-news-subscribe@lists.ucla.edu](mailto:ora-news-subscribe@lists.ucla.edu). The subject line and body of the e-mail can be blank
- Off-Campus Access Update
  - Cisco SSL AnyConnect
  - Download software at <https://www.bol.ucla.edu/services/vpn/all.html>. Contact the BOL Help Desk at (310) 267-4357 or email [consult@ucla.edu](mailto:consult@ucla.edu) for assistance
- ERS Training Course
  - September 6 and 7, 2017
- ERS Help Desk:
  - Connie Brown at [ershelf@research.ucla.edu](mailto:ershelf@research.ucla.edu)

“SEE YOU ALL AT ...!”

100%

## Contact information

EFM Website

<http://ora.research.ucla.edu/EFM/>

Yoon Lee

X40375

[yoon.lee@research.ucla.edu](mailto:yoon.lee@research.ucla.edu)

Jennifer Aguilar

X42846

[jAguilar@research.ucla.edu](mailto:jAguilar@research.ucla.edu)

Connie Brown

X42845

[cbrown@research.ucla.edu](mailto:cbrown@research.ucla.edu)

