AGENDA

- BruinBuy *Plus* Launch
- Contract and Grant Expenditure Type List
BRUINBUY PLUS LAUNCH
UCLA’s new procure-to-pay system, BruinBuy Plus, successfully launched on January 2, 2024!

To prepare for success in the new system, we will review the following topics:

1. New invoice submission process
2. Change order limitations on migrated Purchase Orders
NEW INVOICE SUBMISSION PROCESS

New invoice submission process:
• Transcepta and the invoice submission portal have been decommissioned
• Vendors must email invoices to noreply@invoices.ucla.edu
• For more information, visit the BruinBuy Plus hub

Outgoing subaward Invoices:
• All subaward invoices submitted to noreply@invoices.ucla.edu will need to be approved by the PI and Fund Manager in BruinBuy Plus, even if the invoice is already signed by the PI
• If departments receive invoices directly from subawardees, submit invoices immediately upon receipt (without PI signature); then, complete approvals in BruinBuy Plus
CHANGE ORDERS ON MIGRATED PURCHASE ORDERS

Policy for Change Orders on Migrated POs:

- Change orders cannot be made to Purchase Orders that have been migrated from BruinBuy to BruinBuy Plus
- A new PO must be requested, and the old PO must be closed out

Impact on Research:

- Procedure applies to any modifications to POs, including outgoing subawards (e.g., NCE)
- Departments must request creation of new POs in a timely fashion to allow OCGA sufficient time to execute modifications to subawards
- Delay in request of PO can cause delay in execution of modification to subawards
BRUINBUY PLUS ACCESS & TRAINING

Who has access?

• All PIs with outgoing subawards have been granted access to BruinBuy Plus
• Fund Managers are provided access to the system upon completion of required training

Training

If access is needed for Fund Managers to assist PI’s with review of subaward invoices:

1. Access the Fund Manager BruinBuy Plus course page on Bruin Learn and log in via SSO
2. Click Begin Course Now and navigate through the training materials
3. Complete the final assessment to receive credit

Course length is approximately 30 min
CONTRACT & GRANT EXPENDITURE TYPES
EXPENDITURE TYPES

Background:

- Expenditure Type represents the classification of the expense and is the “E” in the POETAF chart string
- Will be used to charge contract and grant expenses in PPM and will roll up to the Account segment in the CoA
- Initial list of Expenditure Types was shared at the April 2023 RAF
- Thank you to those who shared input – the updated Expenditure Types list reflects your feedback

Additional Review Conducted

- Incorporated CoA Account values into analysis to confirm Expenditure Types are not less granular than the CoA → added additional Expenditure Types for these cases
- Some boundary systems (ex. BAR) cannot accommodate POETAF → updates made to align the Expenditure Type list with the CoA Account values as needed
EXPENDITURE TYPES

Request for Additional Feedback:
• Your feedback is requested on the updated Expenditure Type list!
  • List will be shared following RAF meeting via the ORA News mailing list
  • Email kcadle@research.ucla.edu with any feedback by end of day Wednesday, January 24th

<table>
<thead>
<tr>
<th>Expenditure Types:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory Equipment for Project - Other Equipment</td>
</tr>
<tr>
<td>Inventory Equipment for Project - Scientific Medical</td>
</tr>
<tr>
<td>Inventory Equipment for Project - Scientific Non-Med</td>
</tr>
<tr>
<td>Inventory Equipment for Project - Telecom/Networking</td>
</tr>
<tr>
<td>Inventory Equipment for Project - Vehicles</td>
</tr>
<tr>
<td>IRB Fees</td>
</tr>
<tr>
<td>IV Solutions</td>
</tr>
<tr>
<td>Lab/Shop Glass/Plastic/Ceramics</td>
</tr>
<tr>
<td>Lab/Shop Instruments And Supplies</td>
</tr>
<tr>
<td>Lab/Specialized Equipment &lt; $200</td>
</tr>
<tr>
<td>Laboratory - Gases-Compressed</td>
</tr>
<tr>
<td>Laboratory - Gases-Cryogenic</td>
</tr>
<tr>
<td>Laboratory - Precious Metals</td>
</tr>
<tr>
<td>Laboratory - Specimens</td>
</tr>
<tr>
<td>Laboratory Animals &amp; Supplies (Purchase)</td>
</tr>
<tr>
<td>Laboratory Testing Services - External</td>
</tr>
<tr>
<td>Laboratory Testing Services (Recharge)</td>
</tr>
</tbody>
</table>
CONTACT INFORMATION

KATIE CADLE
kcadle@research.ucla.edu

ASCEND 2.0 RESEARCH WEBSITE
https://ascend.ucla.edu/research/overview