

March 2024 Research Administration Forum Q&A

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Contract and Grant Administration

Q1: Can the campus create some sort of program, similar to eDGE, to have specific questions that PIs need to read/complete on a minimum of annual basis in regard to foreign components? If it is a smart form, I think it would greatly help PIs understand what they need to report.

A1: OCGA continues to issue guidance for C&P (Other) support as sponsor requirements evolve. If and when sponsor requirements become more aligned, it will be possible to streamline guidance.

Q2: Will a new letter of support, with the language you provided, be required for a subaward on an administrative supplement, if that entity is already a subaward on the parent grant? And what if the entity is not on the parent grant? I'm referring to foreign subawardees.

A2: While language regarding NOT-OD-23-182 is not being required for Letters of Support from international subrecipients, OCGA does recommend that the language be included for any proposal requests that represent scope of work changes (ie. additions to or new scopes of work under the parent project).

Q3: Do you suggest that we use \$50k MTDC for the subaward on proposal start on Oct. 2024 and forward?

A3: We'll issue guidance nearer the time.

Q4: Is it possible to share the slides after presentations?

A4: The slides for each RAF in 2024 are posted here: <https://ora.research.ucla.edu/raf/raf-2024/>

Extramural Fund Management

Q1: Will expenses still post to the subledger even if there are no available funds in expense categories?

A1: Yes, expenses will still post to the subledger even if the budget available is insufficient to cover the expenses. We will set the budgetary control in Oracle PPM at the advisory level, which means, the user will get a warning message when trying to make a purchase if sufficient funding is not available, but the user will not be prohibited from proceeding.

Ascend 2.0

Q1: Is there anything ORA can do to help us at the department level to navigate the continuing challenges of BB+? We have wrong faculty members receiving PI notifications to approve subaward invoices that don't belong to them. This is an ongoing problem that hasn't been resolved despite months of emails, tickets, and BB+ office hours. Now there is a big backlog of unpaid subaward invoices, and it is negatively affecting our ability to close out funds in a timely

manner. There are dozens of other issues as well. Can ORA host a joint meeting with the BB+ team to help us address these? Or can they help advocate for us to see improvements in a more timely manner? We would appreciate anything you could do.

A1: We understand the challenges experienced by campus and will take this feedback to the Project Team overseeing the implementation and hypercare.

Q2: Will the project list show the sponsor award number? The current screen copy looks difficult to identify if there are awards by the same sponsor.

A2: Yes, the award search and results grid will contain a variety of demographic details to allow users to distinguish awards by the same sponsor. This will include sponsor award number. Similarly, the project list will include demographic details for each project within a single award.

Q3: Is Project in A2 actually a different concept? B4, Project at Department level is meant to differentiate Expenses. In A2, it is for Budget purposes, correct?

A3: Project represents the P in the POETAF chartstring and is similar to the account-CC concept in current state. Users will both budget and charge expenses at the Project level in PPM.

Q4: When searching from the initial screens, what is the definition of Award Number? Right now, campus uses Fund Number to search and OCGA uses PATS Number to search different systems.

A4: Award number in Oracle PPM will be the same 8 digit number in PATS. The award number in Oracle PPM will be equivalent to the fund number in today's financial system for most single fund number cases. This means in future state there is one less number to remember, as the PATS number = PPM award number (no separate fund number in the financial system).

Q5: If a request is denied, I'm assuming it will be sent back to the preparer with the denial reason. Can the original transaction be amended? Or will the end user need to recreate a new request from scratch?

A5: When an approver returns a request, it will be sent back to the initiator. They have the option to update and re-route through the approval workflow or the ability to withdraw a request if it is no longer needed.

Q6: Regarding the new budgeting tool, would inputting separate projects into this budgeting tool replace the need for doing TOFs? In other words, is this a planning tool, or is this how we will physically transfer funds into different pots?

A6: The budgeting tool will replace the need for doing TOFs by departmental users and will serve both purposes mentioned. Department users will use the tool to reallocate budgets across categories only when sponsors restrict rebudgeting.

Q7: Who approves Project creation?

A7: Most project creation requests initiated by departmental users will be approved by EFM within ORA.

Q8: If we create a new project, or move funds to a new category, and the change is outside the sponsor guidelines (such as greater than a 25% change for the NIH), would ORA review this, and deny the request? Say we move too much money from salary to supplies, or vice versa?

A8: ORA will review all requests to create new projects or rebudget between existing projects to ensure they are in alignment with the sponsor budget. If a rebudget requires sponsor approval and was approved by the sponsor, the request will ultimately be denied by ORA.