

June 2024 Research Administration Forum Q&A

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Human Research Protection Program

Q1: What is the YouTube channel for BruinIRB?

A1: It's where we house all of our training videos/recordings. You can find it here: <https://www.youtube.com/@OHRPP>

Contract and Grant Administration

Q1: Do you know if DOD will also use the common forms?

A1: Yes, please see the presentation.

Ascend 2.0

Q1: Are you saying that when we run payroll reports, they will contain salary, benefits, TIF, and GAEL all in one place? Instead of the current state where we can only see salary and benefits?

A1: We plan to bring transactions at the detail level from UCPath (e.g. salary, benefits, fee remission, GAEL) into Research Finance in PPM rather than summarizing the transactions as they appear on the General Ledger (GL) today. This is possible because the transaction detail exists in UCPath.

Q2: It is just unfortunate not to have these nice features for future generations. All data to be reported is generated at department level, we have to remember. Recon is done at department level, etc., without these good features, the job is getting a little clumsier.

A2: We understand the lack of user entered text fields for departmental discretionary use is a significant change. Unfortunately, this is a limitation with most ERP systems, including Oracle Financial Cloud. The Grant team was able to identify alternative business solutions to meet the needs of sponsor terms and conditions and UCLA policies.

Q3: What if the level of detailed captured in FAU project & source is required for PI oversight/management of the overall project in an effective way? These PI requested reporting mechanisms don't seem to require additional projects to be created (otherwise it might exponentially increase the # of projects). Would we then need to create full financial reporting batches for each project? I'm not as familiar with other source systems, ex. Concur, but are there user-friendly reporting capabilities in all those source systems?

A3: Please reach out to the UCLA Grant team to discuss this case further. We are interested to learn more about details required for PI oversight/management that are not required by sponsor terms and conditions or by UCLA policies. In regards to source system reporting capabilities, I will share with the larger Ascend team the need to have user-friendly reporting capabilities in various source systems (e.g. Concur, BruinBuy Plus).

Q4: The major business use of project and source code is for projections, which are included on financial statements for Faculty. The generation of financial statements and reviewing these with Faculty is a defined requirement in P910. Are you saying the stance is that because the term "projection" is not explicitly defined in P910 that there is no plan to address this essential business need in the design of the financial system? And that the current mechanisms that facilitate this (project source) are being sunset requiring administrators to create new manual processes?

A4: The Ascend team is looking into ways to address the departmental need for projections. More information will be shared as information is available.

Q5: Fund managers (the people reviewing and reconciling) don't use the source systems, so in order now to reconcile those expenses, we have to manually ask our purchasers to log in and provide that information to us.

A5: Thank you for this feedback in that some fund managers may not have access to source systems to access this level of data. We will share this with the larger Ascend team to assess solutions for fund managers to be able to access the data they need in the source systems.

Q6: This presentation on project code makes sense for C&G fund in the new system, but we need useful tracking mechanism in sales and service funds in lieu of project code per vendor we provide the services to. We use that for our reconciliation. Is there any other presentation that relates to S&S outside of RAF sessions?

A6: The information shared today only applies to Research Finance in PPM the subledger that houses the financial activity for contract and grants. Sales and Service funds are not part of PPM and instead are managed directly within the GL using the CoA. More information can be found on the [Ascend website](#) regarding the fields available in the CoA.

Q7: It is very unfortunate to hear that depts will no longer have a field to use for notes. This has been very crucial for customized reporting needed between managers and fund managers. This makes it difficult for us to identify and memorize chart strings if a faculty has a large research portfolio.

A7: We understand the lack of user entered text fields for departmental discretionary use is a significant change. Unfortunately, this is a limitation with most ERP systems, including Oracle Financial Cloud.

Q8: Can we go back to seeing salary based on the employee end date? Prior to UCPATH, we could use the code in the system as F (Fixed) and that would encumber on the ledger. Will this be an option?

A8: In general, similar to current state, UCPath payroll will not be encumbered within Research Finance in PPM. Please feel free to reach out to the Grant team if you have more specific questions.

Q9: I think the Q&A period would benefit from the full questions being read, instead of providing a summary to the presenter to answer.

A9: Thank you for sharing this feedback and we will keep this in mind for future sessions.

Q10: Are there any changes to clinical trial appropriations in the award synopsis?

A10: There are no changes to the awarded amounts for clinical trials reported in the award snapshot. The change is that the awarded amount from the award snapshot will now be appropriated within the financial system at the time of award execution.

Q11: Just want to say that is very difficult to manage the CTs and other FFP awards when we appropriate the estimated award, as our actual award can be much less, so it requires us to create a shadow system to determine our true earned appropriation.

A11: We understand the challenge this poses as the awarded amount in the snapshot is a maximum estimate and may not reflect the award amount received. As reports are being developed, we will keep in mind the need to have a simple and transparent way for departments and PIs to compare the payments received (awarded amount) to expenditures.

Q12: I thought that customizable values such as Project and Source codes were not able to be setup in Oracle, which is why they weren't being implemented into PPM. However, it sounds like the CoA has the flex field to utilize similar coding. Is it the decision of the Ascend team that the way we are utilizing project/source codes are not following GAAP?

A12: It is correct that free form text fields are not available within the CoA or POETAF and this is a limitation within Oracle Financials Cloud. To address this limitation, the Grants team reviewed scenarios received from campus and ORA and developed alternative business solutions for cases where tracking of expenses is required by sponsor terms and conditions. More information regarding the various fields available in the CoA are available on the [Ascend website](#).