

Contract and Grant Notes 11/14/06

1. Follow-up Questions from previous meeting
 - a. OR phone protocol – If team leader is unavailable then a team member will be assigned your question. OR will route your call to appropriate person.
 - b. Pre-Award policy – We will form a focus group consisting of Accounting, OR, and 2 members of C&G User’s Group. They will meet for 1 to 2 hours to discuss issues.
 - c. Expanding communication venues - It was agreed communication needs to be improved. Scotmail and/or listservs will be utilized, iViews will be used more. OR to demonstrate its portal and listserv subscription page. C&C is working on a targeted user application.
All are urged to subscribe to office-of-research@lists.ucr.edu to receive periodic UCR contract and grants information. Self subscription is available at <http://lists.ucr.edu/mailman/listinfo/office-of-research>
 - d. Travel workshop – Sharon Shanahan to gather specific examples of problem issues to be discussed in a future workshop that would be of interest to the general group.

2. Administrative Updates
 - a. Office of Research
 1. Bruce demonstrated Web Page News
<http://or.ucr.edu/>
 2. Bruce demonstrated where to find Staff
<http://or.ucr.edu/home/Staff.aspx>
 3. Bruce demonstrated where to find Staff by Department
<http://or.ucr.edu/home/Staff.aspx?t=2>
 - b. Accounting
 1. Bobbi reminded Users group of the NIH salary cap. Maximum rate paid guidance can be found on Academic Personnel web page
<http://academicpersonnel.ucr.edu/Salary/NIHCap06.doc>
 2. Update on the 2 UC Federal audits –One on effort reporting – timeliness is the issue. The other is concentrating on direct costs vs. indirect; proposed vs. approved.
 3. Bobbi asked for comments from Users regarding a new process for the fiscal administration of Multiple Campus Awards (MCAs). The primary objective is make the transactions more visible to users on the ledgers, but still have the transaction net to zero.

Please review DRAFT - Proposed process for Multiple Campus Awards following these minutes and provide comments to Bobbi at bobbi.mccracken@ucr.edu.

3. Discussion Topics

- a. Demonstration of OR web portal by Stan Fletcher
- b. Resources for Staff – Reports <http://www.ora.ucr.edu/Home/Reports.aspx>
On Line report page. You will need a NetID and password. Click OR Web Portal. Tabs at top to forms and reports.
- c. Stan demonstrated simple queries using filter, fields, and result. Results could be fed into web or excel formats. Turn off 'pop up blocker'.
- d. Question: "Are UC awards (UC Mexus for example) in PAMIS (COEUS)? Answer: "Yes"
- e. Question: "Unfunded or Zero Dollar awards?" Answer: "Yes. Other University's may or may not show up, they may or may not do it."
- f. Question: "Intercampus transfer of Funds?" Answer: "Yes, if it is to conduct research." "If you find that something that should be in PAMIS, but isn't, contact Bruce."
- g. Question: "Is there a report that can be run for awards that were expired/closed that month?" Answer: Bobbi "possibly an Accounting Report." A discussion as to an Accounting report that already exists that could be made available to general users and Equipment Management.
- h. A Call for Volunteers from Bruce Morgan to make the Queries language in COEUS more user friendly. Bobbi McCracken mentioned that C&C is working to merge UCRFS, PAMIS, and COEUS systems. Making the language consistent within those systems is vital.

DRAFT - Proposed process for Multiple Campus Awards

Presented to C&G User Group

November 14, 2006

Establish new budget category BC68-Contra Subcontracts-Inter-campus

Establish new expense accounts associated with each campus under BC67

812100 Memo Posting MCA Payments to UCOP

Rename 812110 to Memo Posting MCA Payments to UC Berkeley

812120 Memo Posting MCA Payments to UC San Francisco

812130 Memo Posting MCA Payments to UC Davis

812140 Memo Posting MCA Payments to UC Los Angeles

812150 Memo Posting MCA Payments between Location 5 and N

812160 Memo Posting MCA Payments to UC San Diego

812170 Memo Posting MCA Payments to UC Santa Cruz

812180 Memo Posting MCA Payments to UC Santa Barbara

812190 Memo Posting MCA Payments to UC Irvine

812191 Memo Posting MCA Payments to UC Merced

OR

Alternatively Account 812110 could be used with various cost centers representing campuses (cost centers already exist). Major cons: cost centers do not display on ITD report and may impact ERS reports.

Establish new expense account under BC68

813110 Memo Posting Contra MCA Payment

Journal Entry to transfer funds to other campus and record as an expense in Riverside ledgers

Dr Unexpended Balance Account-Fund-AX1392-08XX

Cr Financial Control

Dr. 8121XX-Fund-Dept Activity-Function (or 812110 w/ CC)

Cr. 813110-Fund-Dept Activity-Function

PROGRAMMING REQUIRED to PAMIS BEA when MCA involved

Debit (Increase) BC67*

Credit (Decrease) BC68*

Debit (Increase) Unexpended Balance