

**Department of Medicine**  
**Research Services Administration Unit Monthly Meeting**

*February 15, 2007*

**Present:** Chude Allen, Connie Archea, Peggy Bartek, Olive Burk, Michelle Chang, Christie Chu, Jane Drake, Brett Friberg, Estrella Garcia, Annie Handajani, Christina Hsu, Kathy Judd, Jennifer Kellen, Calvin Kwok, Donna Langston, Karen Lau, Susan Lau, Anne Lawrence, Linda Lew, Lily Luu, Christine Mok, Marienna Murch, Kate Shumate, Solat Navab, Wendy Ng, William Rypcinski, Suzanne Sutton, Kapo Tam, Joyce Troiano, Bill Walzer, Joseph Wilson, Jack Whiteford

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**Announcements**

The ABOG Tools of the Trade session “Where is the Money?” is scheduled for Thursday, February 15th from 11:00–12:30 PM at Laurel Heights (Regents Room). Kathy Judd and Susan Lau organized this session for Michael Grafton to present on practical ways to identify payments in the general ledgers.

The deadline to complete ERS training is February 28, 2007. Another Tools of the Trade session is being planned to cover an aspect of the new effort reporting system; specifically, how to do the offline work necessary to verify the PAR.

Current RSA vacancies are in Cardiology (Analyst II), CAPS (Analyst IV), and Nephrology (Analyst III).

We will resume WebLinks training this month. Sessions are scheduled for the fourth Thursday of every month at Laurel Heights at alternating locations from 1:00–3:00 PM. There was a request, however to make the sessions early morning or late afternoon to accommodate attendees from other sites. For a list of the dates, please contact Tanjira at 502-4292.

**Questions for Mark Battles**

Mark Battles was scheduled to present to us on how to understand and locate revenue in Weblinks, but his presentation was canceled. He has rescheduled for Friday, March 2<sup>nd</sup> from 8:30–10:00 AM. In preparation, we discussed some of the topics and questions that we would like Mark to cover:

1. When and how do invoices get credited for CTs?
2. What is the timeline for posting payments? Can PPOs be set up automatically to transfer cash payments to the budget?

3. Understanding the bottom line.
4. What do we do when the DPE does not match the general ledger total for payroll (eg, UARP)?
5. Where do we find the dictionary for the AFP?
6. How do we use the fund summary for the prepaid accounts (scheduled payments on contract)?
7. How is STIP generated and can it be carried forward from one year to the next?
8. How long should records be retained after a grant ends?

### **Staff Retention**

Before the meeting, RSAs were asked to provide comments and topics for discussion concerning retention of staff. The comments were compiled anonymously and encompassed a few themes, including heavy workload and balancing proposal deadlines with post-award responsibilities.

When polled, the majority of RSAs stated that they enjoy doing both pre- and post-award grants management. When asked why they enjoy both, RSAs stated that an account makes more sense when it can be seen from start to finish. They are also able to manage an account more efficiently when they understand the grant terms and how the proposal was created. Only a minority expressed a preference for doing one over the other, especially post-award. When asked why some RSAs prefer post-award over pre-award, their responses were:

1. When proposals don't get funded, it seems that a lot of energy was expended for little return.
2. RSAs prefer solving problems and focusing on the details that provide an end result.
3. The outcome in post-award is controllable and less deadline driven than pre-award and RSAs can therefore follow their own timelines.
4. There is less duplication of effort in post-award.

Many RSAs felt that the trainings and resources the Department currently provides have come a long way from what was given in the past. They suggested training on how to file and organize grant documents. We also discussed whether new RSAs needed to be coached through their first grant proposal, but opinion was divided on this subject.

Based on this discussion, new resources will be provided, including a combined resource list, to be updated on an ongoing basis, of who to contact about specific issues. Another new resource will be an e-mail list server for RSAs to post their questions and answers; we anticipate that best practices could be easily shared in this way.

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*The next RSA meeting is scheduled for Thursday, **March 15, 2007** from 8:30-10:00 AM in room **430F** (Large Conference Room).*