

Department of Medicine
RSA Monthly Meeting
October 19, 2010
8:30am – 10:30am, Laurel Heights Room 376

Present: Michele Benjamin, Alice Chin, Hung Dao, Margie Dere, Elizabeth Flora, Raymond Fong, Cherie Habayeb, Nancy Huynh, Kathy Judd, Calvin Kwok, Christine Mok, Marienna Murch, Wendy Ng, Solat Navab, Suzanne Sutton, Susana Szeto, Yvette Villicana, Lei Lei Win, Pat Wirattigowit, Eric Wu

Bi-Weekly Payroll

- On September 1, 2010, the campus transitioned non-exempt and exempt variable employees from the monthly pay cycle to a bi-weekly pay cycle.
- Bi-Weekly pay cycle includes a 2 weeks period that starts from Sunday and ends on Saturday.
- Bi-Weekly pay date is every other Wednesday, 11 days following the Pay Period End (PPE) date
- A total of 26 paychecks (pay period) per year
- Expense is recognized in the month when the pay period ends (PPE), *NOT* the month when the pay is received.
- DPE (Distribution of Payroll Expense) now displays hours instead of % of time for bi-weekly employees.
- Hourly rate conversation:
 - Annual Rate / 2088 hours; or
 - Monthly Rate / 174 hours

Bi-Weekly Ledgers

- The payroll system ran an accrual process for employees on the bi-weekly pay cycle in September 2010. The accrual process generated data on the general ledgers that didn't match data on the payroll ledgers (DPE). This variance is the difference between the employee's monthly pay versus bi-weekly pay for the month. **(See example below)**
- Luckily, the accrual process was discontinued in October and accrual entries from September were reversed in October. **(See example below)**
- Be sure to check your October 2010 ledgers to make sure the accruals data no long show up.
- DPE (payroll ledgers) posted benefits related to bi-weekly salary. However, GL (general ledgers) posted benefits charges for the entire month, not just bi-weekly data. For budget status reports, best to use monthly benefits to project costs on a monthly basis.
- Ledgers reconciliation should be straight forward but if you need assistance with reconciling and/or projecting payroll expenses, please review the short presentation from the Controller's Office – *Understanding the DPE for Bi-Weekly Employees*. **The direct link to the presentation is:**
http://controller.ucsf.edu/fin_systems/files/Finance_Updates_DPE_HBS_BW_Employees.pdf

What is "TAVLA"?

TAVLA - Combined project covers two system implementations:

Time and Attendance (TA): HBS Online timekeeping system for completing and approving timesheets and tracking leave balances

Vacation Leave Assessment (VLA): Process for assessing vacation liability from the funding sources in place at the time vacation is earned.

- Please be aware that the implementation of VLA has been delayed by two months. The effective date for VLA will be in January 2011. Town Hall meetings for administrators will be scheduled for early December to review the program in detail. In the meantime, you should continue to use the presentation from the May 2010 town hall meeting to review the VLA program with your investigators or staff.
- Prior to the system roll out, you should gather the vacation leave accrual information from your Division Administrator or PI to assist you with projection of future vacation accrual liability for the projects that you manage. Information such as accrual rate, usage rate and accrual code will be crucial.

TAVLA: Vacation Leave Assessment Town Hall Meetings for Administrators - May 2010

Go to this link for the presentation from May 2010 meeting:

http://controller.ucsf.edu/fin_systems/files/VLA_Town_Hall_Meetings.pdf

The shorter Faculty Presentation and Recorded Webinar for academics and staff can be located via this link: http://controller.ucsf.edu/fin_systems/fils/VLA_Faculty_Webinar_Sept2010.pdf

Erik Lium, Assistant Vice Chancellor for Research was the guest speaker at our October meeting.

The Office of Sponsored Research (OSR) is part of the Office of Research reporting to the Executive Vice Chancellor and Provost/ Vice Chancellor of Research, who are assisted by an Associate and Assistant Vice Chancellor for Research.

Erik manages the activities within these functional units:

- Contracts & Grants Division
- Business Research Units
- Conflict of Interest Division
- Industry Contracts Division
- Committee on Human Research
- CTSI Regulatory Groups

According to Erik, the recruitment for Director of Contracts and Grants is still ongoing. For new Contracts and Grants staff, training will be provided. It is the responsible of the Department to ensure applications submitted to Contracts and Grants are completed correctly. The 5 working days to review applications brought significant improvement to the workload within Contracts and Grants. The turnaround time for processing subcontracts has also made much improvement. Erik provided us with a chart of average time to process subcontracts per month. He also included the OSR Training initiative: OSR Pre-Award Responsibilities Job Aid. **(Chart and Job Aid are attached)**

For the remainder of the meeting, Erik focused his time on operational excellence for research administration. Erik and Georgina Lopez are co-chairs for the Research Operational Excellence Work Group. They are charged with translating the Chancellor's charge into a working reality with an objective to create administratively efficient and effective processes that also save money. Similar to what we have heard from Suzanne Sutton's updates from past RSA meetings, the Work Group started to redesign the processes, develop an organizational structure with corresponding job families, performance metrics, and training. Proposed changes such as application approval, PI portfolios, award set up and training and certification were discussed. You can find detailed information on these proposed changes from past RSA meeting minutes.

Upcoming RSA meetings

RSA Meeting on November 18, 2010 at 8:30-10 am in LH376 (Kathy Judd)

RSA Holiday Party on December 16, 2010 at 8:30-10 am in LH 376

RSA Meeting on January 20, 2011 at 8:30-10 am in TBD (Suzanne Sutton)

RSA Meeting on February 17, 2011 at 8:30-10am in TBD (Joseph Wilson)

RSA Meeting on March 17, 2011 at 8:30-10am in TBD (Wendy Ng)

RSA Meeting on April 21, 2011 at 8:30-10am in TBD (Kathy Judd)

RSA Meeting on May 19, 2011 at 8:30-10am in TBD (Joseph Wilson)

RSA Staff Retreat on June 16, 2011

Payroll Calendar 2010-2011

UCSF Bi-Weekly Pay Calendar September 2010 - December 2011

September 2010							October 2010							November 2010							December 2010						
S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S
			1	2	3	PPE						1	PPE		1	2	3	4	5	6				1	2	3	4
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	PPE	5	6	7	8	9	10	PPE
12	13	14	15	16	17	PPE	10	11	12	13	14	15	PPE	14	15	16	17	18	19	20	12	13	14	15	16	17	18
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	PPE	19	20	21	22	23	24	PPE
26	27	28	29	30			24	25	26	27	28	29	PPE	28	29	30					26	27	28	29	30	31	
							31																				
January 2011							February 2011							March 2011							April 2011						
S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S
						1			1	2	3	4	PPE			1	2	3	4	PPE						1	PPE
2	3	4	5	6	7	PPE	6	7	8	9	10	11	12	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9	10	11	12	13	14	15	13	14	15	16	17	18	PPE	13	14	15	16	17	18	PPE	10	11	12	13	14	15	PPE
16	17	18	19	20	21	PPE	20	21	22	23	24	25	26	20	21	22	23	24	25	26	17	18	19	20	21	22	23
23	24	25	26	27	28	29	27	28						27	28	29	30	31			24	25	26	27	28	29	PPE
30	31																										
May 2011							June 2011							July 2011							August 2011						
S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S
1	2	3	4	5	6	7				1	2	3	4						1	2		1	2	3	4	5	PPE
8	9	10	11	12	13	PPE	5	6	7	8	9	10	PPE	3	4	5	6	7	8	PPE	7	8	9	10	11	12	13
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	PPE
22	23	24	25	26	27	PPE	19	20	21	22	23	24	PPE	17	18	19	20	21	22	PPE	21	22	23	24	25	26	27
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30	28	29	30	31			
														31													

PPE Pay Period End Date



Pdf Excel

Distribution of Payroll Expense by DPA, Fund, Sub for 09/2010 (CLOSED)

Row(s) 1 - 4 of 4

Mo	Line	Name	ID	Title	End Date	DOS	Time	Rate	J	Earnings	Benefits	IAPOF	MEDCR	VIS/OPEB	GSH/BRK	ESP	DI/GSFR	LEAVE	AN	PSS/SMSP	
Dpa - 444988 RESEARCH-DEP OF MEDICINE-VA HOSP																					
Fund - 33413 K23 HL083099-01A1 SNAP FDP K																					
Sub - 0 Academic Salary																					
	1103	2764401	[REDACTED]	[REDACTED]	1724	09/30/2010	HRG	.7692	‡	7908.33	6,083.09	1,697.32	0.00	427.88	952.53	6.08	59.01	8.50	0.00	U	243.32
	1103	2764402	[REDACTED]	[REDACTED]	1724	09/30/2010	HST	.0211	‡	7908.33	166.87	46.54	0.00	11.73	26.12	0.17	1.62	0.23	0.00	U	6.67
Total:										6,249.96	1,743.86	0.00	439.61	978.65	6.25	60.63	8.73	0.00		249.99	
Sub - 1 Staff Salary																					
	1103	2764403	[REDACTED]	[REDACTED]	9613	09/04/2010	REG	24.00	H	16.8600	404.64	172.84	0.00	30.43	119.35	0.40	3.92	2.55	0.00	U	16.19
	1103	2764404	[REDACTED]	[REDACTED]	9613	09/18/2010	REG	80.00	H	16.8600	1,348.80	577.93	0.00	103.18	397.86	1.35	13.09	8.50	0.00	U	53.95
Total:										1,753.44	750.77	0.00	133.61	517.21	1.75	17.01	11.05	0.00		70.14	
Total:										8,003.40	2,494.63	0.00	573.22	1,495.86	8.00	77.64	19.78	0.00		320.13	
Total:										8,003.40	2,494.63	0.00	573.22	1,495.86	8.00	77.64	19.78	0.00		320.13	
Totals:										8,003.40	2,494.63	0.00	573.22	1,495.86	8.00	77.64	19.78	0.00		320.13	

Row(s) 1 - 4 of 4

Selected Report Criteria	
Fund:	33413
Adjustment Code:	ALL
TOE Date:	09/2010 To: 09/2010

* Compare these totals to totals on general ledgers

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GL Transaction Detail for 09/2010 To 09/2010 (CLOSED)

Row(s) 1 - 42 of 42

Src	NCA	Prog	Line Description 1	Budget	Financial	Lien PO ID	Invoice ID	Invoice Dt	Jrnl ID	Jrnl Dt	Reference	Posted Dt	Prepid
Grand Total:				148,770.00-	0.00-	0.00							
DPA - 444988 RESEARCH-DEP OF MEDICINE-VA HOSP													
FundFY - 33413-01 K23 HL083099-01A1 SNAP FDP K													
NCA Group - 200000 REVENUE NCA BUDGET GROUP													
533	331021		Recognized Revenue	0.00	52.22-	0.00			G800204318	09/30/2010		10/02/2010	SFPROD
533	331021		Recognized Revenue	0.00	12,861.28-	0.00			G800203992	09/30/2010		09/30/2010	SFPROD
533	331021		Recognized Revenue	0.00	54.44-	0.00			G800204490	09/30/2010		10/05/2010	SFPROD
Total:				0.00	12,967.94-	0.00							
NCA Group - 401000 ACADEMIC SALARIES - EXC TIME													
536	401011		SEP PAYROLL	0.00	6,083.09	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	401012		SEP PAYROLL	0.00	166.87	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
Total:				0.00	6,249.96	0.00							
NCA Group - 403000 SALARY RELATED (BUDGET USE)													
536	403250		SEP PAYROLL	0.00	1,213.92	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
Total:				0.00	1,213.92	0.00							
NCA Group - 404200 NON-ACAD SALARIES - EXC TIME													
536	404210		SEP PAYROLL	0.00	1,753.44	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
Total:				0.00	1,753.44	0.00							
NCA Group - 411000 ACADEMIC BENEFITS													
536	411060		SEP PAYROLL	0.00	356.29	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411070		SEP PAYROLL	0.00	83.32	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411110		SEP PAYROLL	0.00	41.88	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411130		SEP PAYROLL	0.00	6.25	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411140		SEP PAYROLL	0.00	18.75	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411210		SEP PAYROLL	0.00	249.99	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411250		SEP PAYROLL	0.00	5.30	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411270		SEP PAYROLL	0.00	10.63	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411290		SEP PAYROLL	0.00	687.60	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411340		SEP PAYROLL	0.00	62.93	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411380		SEP PAYROLL	0.00	3.43	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411425		SEP PAYROLL	0.00	206.87	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	411430		SEP PAYROLL	0.00	10.62	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
Total:				0.00	1,743.86	0.00							
NCA Group - 412000 NON-ACADEMIC BENEFITS													
536	412060		SEP PAYROLL	0.00	108.28	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412070		SEP PAYROLL	0.00	25.33	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412110		SEP PAYROLL	0.00	11.75	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412130		SEP PAYROLL	0.00	1.75	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412140		SEP PAYROLL	0.00	5.26	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412210		SEP PAYROLL	0.00	70.14	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412250		SEP PAYROLL	0.00	6.71	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412270		SEP PAYROLL	0.00	13.45	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412290		SEP PAYROLL	0.00	420.36	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412320		SEP PAYROLL	0.00	196.64	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412340		SEP PAYROLL	0.00	22.38	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412380		SEP PAYROLL	0.00	4.34	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412425		SEP PAYROLL	0.00	58.04	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
536	412430		SEP PAYROLL	0.00	2.88	0.00			PR03D10	09/30/2010		09/28/2010	SFPROD
Total:				0.00	947.41	0.00							

System Accruals

bi-weekly salary

monthly (not bi-weekly) benefits



Pdf Excel

Distribution of Payroll Expense by DPA, Fund, Sub for 10/2010 (CLOSED)

Row(s) 1 - 5 of 5

Mo	Line	Name	ID	Title	End Date	DOS	Time	Rate	J	Earnings	Benefits	IAPOF	MEDCR	VIS/OPEB	GSH/BRK	ESP	DI/GSFR	LEAVE	AN	FSS/SMSF
Dpa - 444988 RESEARCH-DEP OF MEDICINE-VA HOSP																				
Fund - 33413 K23 HL083099-01A1 SNAP FDP K																				
Sub - 0 Academic Salary																				
1104	2833501		020555215	1724	10/31/2010	HRG	.7692 %	7908.33		6,083.09	1,697.32	0.00	427.88	952.53	6.08	59.01	8.50	0.00	U	243.32
1104	2833502		020555215	1724	10/31/2010	HST	.0211 %	7908.33		166.87	46.54	0.00	11.73	26.12	0.17	1.62	0.23	0.00	U	6.67
Total:										6,249.96	1,743.86	0.00	439.61	978.65	6.25	60.63	8.73	0.00		249.99
Sub - 1 Staff Salary																				
1104	2833503		027839497	9613	10/02/2010	REG	80.00 H	16.8600		1,348.80	371.22	0.00	102.67	196.53	1.35	13.09	3.63	0.00	U	53.95
1104	2833504		027839497	9613	10/16/2010	REG	80.00 H	17.2800		1,382.40	380.96	0.00	105.75	201.41	1.38	13.41	3.71	0.00	U	55.30
1104	2833505		027839497	9613	10/30/2010	REG	80.00 H	17.2800		1,382.40	380.96	0.00	105.75	201.41	1.38	13.41	3.71	0.00	U	55.30
Total:										4,113.60	1,133.14	0.00	314.17	599.35	4.11	39.91	11.05	0.00		164.55
Total:										10,363.56	2,877.00	0.00	753.78	1,578.00	10.36	100.54	19.78	0.00		414.54
Total:										10,363.56	2,877.00	0.00	753.78	1,578.00	10.36	100.54	19.78	0.00		414.54
Totals:										10,363.56	2,877.00	0.00	753.78	1,578.00	10.36	100.54	19.78	0.00		414.54

Row(s) 1 - 5 of 5

Selected Report Criteria
 Fund: 33413
 Adjustment Code: ALL
 TOE Date: 10/2010 To: 10/2010

* Compare these totals to totals on general ledgers

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GL Transaction Detail for 10/2010 To 10/2010 (CLOSED)

Row(s) 1 - 34 of 34

Src	NCA	Prog	Line Description 1	Budget	Financial	Lien PO ID	Invoice ID	Invoice Dt	Jrnl ID	Jrnl Dt	Reference	Posted Dt	Prepid
Grand Total:				0.00	0.00	0.00							
DPA - 444988 RESEARCH-DEP OF MEDICINE-VA HOSP													
FundFY - 33413-01 K23 HL083099-01A1 SNAP FDP K													
NCA Group - 200000 REVENUE NCA BUDGET GROUP													
533	331021		Recognized Revenue	0.00	12,844.05-	0.00			G800207887	10/31/2010		11/06/2010	SFPROD
Total:				0.00	12,844.05-	0.00							
NCA Group - 401000 ACADEMIC SALARIES - EXC TIME													
536	401011		OCT PAYROLL	0.00	6,083.09	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	401012		OCT PAYROLL	0.00	166.87	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
Total:				0.00	6,249.96	0.00							
NCA Group - 403000 SALARY RELATED (BUDGET USE)													
536	403250		OCT PAYROLL	0.00	1,213.92-	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
Total:				0.00	1,213.92-	0.00							
NCA Group - 404200 NON-ACAD SALARIES - EXC TIME													
536	404210		OCT PAYROLL	0.00	4,113.60	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
Total:				0.00	4,113.60	0.00							
NCA Group - 411000 ACADEMIC BENEFITS													
536	411060		OCT PAYROLL	0.00	356.29	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411070		OCT PAYROLL	0.00	83.32	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411110		OCT PAYROLL	0.00	41.88	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411130		OCT PAYROLL	0.00	6.25	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411140		OCT PAYROLL	0.00	18.75	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411210		OCT PAYROLL	0.00	249.99	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411250		OCT PAYROLL	0.00	5.30	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411270		OCT PAYROLL	0.00	10.63	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411290		OCT PAYROLL	0.00	687.60	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411340		OCT PAYROLL	0.00	62.93	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411380		OCT PAYROLL	0.00	3.43	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411425		OCT PAYROLL	0.00	206.87	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	411430		OCT PAYROLL	0.00	10.62	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
Total:				0.00	1,743.86	0.00							
NCA Group - 412000 NON-ACADEMIC BENEFITS													
536	412060		OCT PAYROLL	0.00	254.62	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412070		OCT PAYROLL	0.00	59.55	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412110		OCT PAYROLL	0.00	27.56	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412130		OCT PAYROLL	0.00	4.11	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412140		OCT PAYROLL	0.00	12.35	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412210		OCT PAYROLL	0.00	164.55	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412250		OCT PAYROLL	0.00	6.71	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412270		OCT PAYROLL	0.00	13.45	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412290		OCT PAYROLL	0.00	420.36	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412320		OCT PAYROLL	0.00	196.64-	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412340		OCT PAYROLL	0.00	22.38	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412380		OCT PAYROLL	0.00	4.34	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412425		OCT PAYROLL	0.00	136.17	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
536	412430		OCT PAYROLL	0.00	936.50	0.00			PR04D10	10/31/2010		11/05/2010	SFPROD
Total:				0.00	936.50	0.00							
NCA Group - 432469 DATA CONNECTIVITY RECHARGE													
5B2	432471		Network Recharge	0.00	62.64	0.00			04DATAREC	10/31/2010	GCRP	11/05/2010	SFPROD

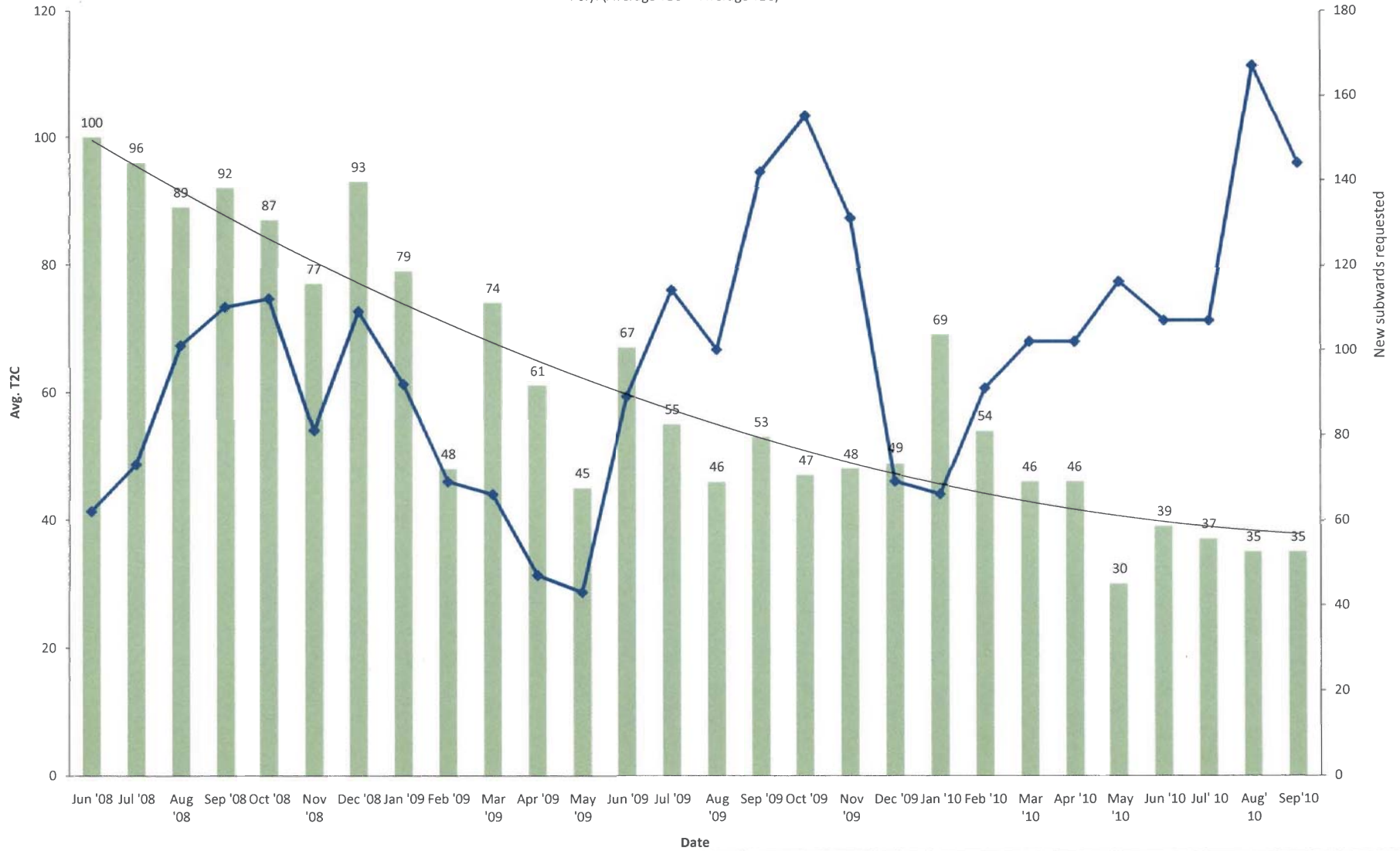
Accruals reversed

bi-weekly salary

monthly (not bi-weekly) benefits

Subaward Request vs. T2C

- Average T2C** Average T2C
- ◆ Subaward requests received at C&G New Subawards Requested
- Poly. (Average T2C** Average T2C)



OSR Training Initiative: OSR Pre-Award Responsibilities Job Aid

Contracts and Grants (C&G) and the Industry Contracts Division (ICD) of the Office of Sponsored Research (OSR) have developed this job aid to define the OSR's responsibilities, versus those of departments', in pre-award sponsored programs administration. This document identifies the specific items that OSR Analysts will review in proposals for extramural support. The OSR understands and appreciates that each department may manage proposal development in different ways, and that these practices may depend on the type of proposal under development. As an example of one department's summary of pre-award roles and responsibilities, the Department of Medicine's can be found at:

<http://medicine.ucsf.edu/research/docs/RSA-Handbook.pdf>

OSR Analysts exclusively review the following nine items in proposals:

1. [F&A Rate/Base Code](#)
2. [Budget Period Consistency](#)
3. [PI Status or Exception Request](#)
4. [Department Signatures](#)
5. [Compliance Documents](#)
6. [Sponsor Due Dates](#)
7. [Cost Sharing](#)
8. [Cost Accounting Standards \(OMB Circular A-21\)](#)
9. [Agency Instructions](#)

Review Item	Description
1. F&A Rate/Base Code	OSR Analysts ensure the proposal includes the correct Facilities and Administrative (F&A) Rate and Base Code. <ul style="list-style-type: none"> • F&A Rates can be found at: http://or.ucsf.edu/cg/cg/faculty/fa.html. • The F&A Base Codes can be found at: http://acctg.ucsf.edu/extramural_funds/emf/ohbase1.htm
2. Budget Period Consistency	On the OSR Approval Form, the OSR Analyst verifies that there is no overlap or gap in the budget periods. The Analyst is specifically verifying that the future years of the grant are correctly aligned from the first year to the last year. For example, if the initial budget period is from 01/01/2009 until 12/31/2009, year two budget period should be 01/01/2010 until 12/31/2010.
3. PI Status or Exception Request	The OSR Analyst verifies that the Principal Investigator (PI) listed on the proposal holds PI Status or that the proposal includes an approved PI Status Request Form. <ul style="list-style-type: none"> • PI eligibility requirements and the exception request form can be found at: http://or.ucsf.edu/cg/cg/rsa/proposals/pieligib.html
4. Department Signatures	The OSR Analyst ensures that the required department signatures are included on the second page of the OSR Approval Form. <ul style="list-style-type: none"> • Information on completing the required signatures on the OSR Approval Form can be found at: http://or.ucsf.edu/cg/6178-DSY/6145-

Review Item	Description
5. Compliance Documents	The OSR Analyst reviews the proposal to ensure that the required compliance documents are included in the proposal packet. These include the applicable Conflict of Interest (COI) disclosure forms and/or the Committee on Human Research (CHR) and/or the Institutional Animal Care and Use Committee (IACUC) approvals.
• COI	For more information on COI requirements, including what forms are required for each proposal, please see: http://or.ucsf.edu/osr/coi.html . Note: You must submit a federal PI Certification Form for <u>ALL</u> federal proposals, including proposals with federal flow-through funds.
• CHR	For more information on research involving human subjects, please see the CHR website at: http://www.research.ucsf.edu/chr/index.asp . Note: For federal proposals that are classified as “New”, “Resubmission”, “Renewal”, or “Supplement”, check the just-in-time (JIT) box on the OSR Approval Form and submit the proposal without CHR approval. As soon as the proposal is submitted, please work towards obtaining CHR approval for the protocol.
• IACUC	For more information on research involving animals, please see the IACUC website: http://www.iacuc.ucsf.edu/Index.asp . Note: For federal proposals that are classified as “New”, “Resubmission”, “Renewal”, or “Supplement”, check the just-in-time (JIT) box on the OSR Approval Form and submit the proposal without CHR approval. As soon as the proposal is submitted, please work towards obtaining IACUC approval for the protocol.
6. Sponsor Due Date	Proposals are reviewed by the OSR in the order that they are received. However, the OSR Analyst uses the sponsor due date indicated on the OSR Approval Form to ensure the proposal is reviewed and approved with sufficient time to submit the proposal to the sponsor. Therefore, it is important to enter the correct date for the agency deadline on the OSR Approval Form. The correct date is the date the proposal is due to the agency. Note: Entering an inaccurate date or an arbitrary date will delay, rather than accelerate, the proposal review process. If the agency you are applying to does not have a specified deadline, enter a date 10 days from the date that the proposal is submitted to the OSR.
7. Cost Sharing	OSR Analysts also review the OSR Approval Form to determine if committed cost sharing has been properly applied. The Analysts verifies that the DPA-Fund from which the cost sharing will be paid is indicated. The OSR Analyst also reviews the mandatory committed cost sharing amounts to ensure they include both direct and F&A costs. If voluntary committed cost sharing is indicated in the proposal, the Analyst will review it to ensure that only direct costs are included. • For more information on cost sharing, please see:

	http://or.ucsf.edu/cg/cg/rsa/jobaid/jobaid.html . Please note, UC policy does not allow cost sharing on Industry contracts.
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Review Item	Description
8. Cost Accounting Standards (OMB A-21)	<p>The OSR Analysts perform a cursory review of your proposal budget and budget justification to verify that all costs are compliant with sponsor guidelines. If the sponsor agency requires you compliance with the Cost Accounting Standards described in OMB Circular A-21, please ensure you are adhering to these standards.</p> <ul style="list-style-type: none"> For more information on the Cost Accounting Standards, please visit: http://acctg.ucsf.edu/extramural_funds/policies/index.htm
9. Agency Instructions	<p>The OSR Analyst will review the funding agency instructions, program announcement, Request for Proposals, or other agency instructions for guidance on unallowable costs and other restrictions. <u>Please ensure that this documentation is included in the proposal packet submitted to the OSR. Failure to include this information will delay the OSR’s review and approval process and may delay submission of the proposal to the sponsor.</u></p>

If you have proposal related questions that were not addressed in this job aid or if you need general pre-award assistance for federal or non-profit proposals, please e-mail CGProposalTeam@ucsf.edu or contact the Contract and Grants Help Desk at 476-2977, Monday through Friday from 8:30 am to 12:30 pm.

If you have industry related questions, please email industrycontracts@ucsf.edu or call 415-353-4446.