PAAC Meeting Notes- 9/18/2013

-Announcements:

- Jim Bell sent out email to all Administrators and Chairs about the required Post-Award Management System that will go into effect January, 2014. This e-mail can be forwarded to faculty and staff as reminder about the importance of adopting this process.
- New PAAC website will be available soon. You will be able to find guides and procedures/best practices on this website.
- There will be computer lab drop-in times for the rollout. We will keep you updated on when these will be available.
- Your mentor will be responsible for training your department staff on the Post Award/Procurement process for both the Tier 1 and Tier 2 roles. (However, they won’t be training on how to complete a Purchase Order, etc. Training for M-Pathways procurement is available in MyLinc).
- ITS is still working on items found during the pilot and advancements for the Procurement system.

-Real-Time Financials Checklist:

- LEAN group and the CDA members will make sure that all information is getting out to the PAAC group for the implementation.
- Your department can decide how M-Reports and the new process will be demonstrated to faculty. In most cases, departments are electing to have the SAPOC lead the demonstration for individual faculty.
- Please make sure that your TIER 1 and TIER 2 people are submitted to your mentors by 10/1/2013. Once you submit your TIER 1 and TIER 2 people to your mentors, they will submit it to ITS for access. Please see the email from Karen Lang on 9/20/2013, which has the Med School Roles Template attached.
- Please refer to the Procurement Model sheet and pick which will work best for purchasing and approval in your department. Keep in mind that the more approver groups, the more that has to be maintained. For example if you have a smaller department, you will most likely only have one approver group. See the form for a more detailed outline on options.
Unit Defined Commitments:

- A Unit Defined Commitment (UDC) provides a way to report encumbrances (i.e., revenues or expenses) not yet accounted for by a central system process for your department or project/grant.
- It is important to develop business practices to use the UDC’s. See the UDC website for more information.  [http://www.mais.umich.edu/fin/rtf_toolkit.html#udc](http://www.mais.umich.edu/fin/rtf_toolkit.html#udc)

- **Suggested uses for UDC’s:**
  - Encumber recurring costs
  - Set aside funds for significant one-time use expenses that will be incurred during a project budget period based on meetings with faculty.
  - Encumber significant purchases that will not show up in M-Reports “Purchasing Commitments” column.
  - Encumber temporary employees.
  - End dating the UDC will make sure the charge falls off automatically.
  - Once a UDC is added, it will take 1 hour for it to appear in M-Reports.

- **Releasing UDC’s:**
  - Releasing a commitment removes the encumbered amount (and related indirect cost commitment) from various financial reports.
  - The M-Pathways Manage Unit Defined Commitments grid offers a quick outline method for managing your UDC’s: including amounts, dates, and releases.
  - Three Release Options:
    - Enter a commitment end-date
    - Release as of today
    - Release from last month closed

Next meeting is October 16th, from 10-11:30 in 3114 MS I.