

PAAC Meeting Notes- December 16th, 2015

Policy and guidance Updates:

1. -NIH Grants Policy Statement (NIHGPS)- full 388 page version is available online.

<http://grants.nih.gov/grants/policy/nihgps/index.htm>

Handout of the summary of changes.

http://grants.nih.gov/grants/policy/nihgps/Significant_Changes_NIHGPS_Oct2015.pdf

Most impact to post-award is Sec. 8.1.1.3- allows reduction in effort during next without prior approval. **Effective for all NIH grants and cooperative agreements with budget periods beginning on or after October 1, 2015.**

The exceptions are K awards or other grant programs that require a specific effort level, or where terms and conditions prohibit such reductions. Active awards must have a measurable level of effort.

-NSF also released changes: <http://www.nsf.gov/pubs/policydocs/pappguide/nsf16001/sigchanges.jsp>

2. Transition from NIH Pool payments to NIH subaccount payments-

Handout

http://www.finance.umich.edu/system/files/NIH_Transition_Quick_Reference_Guide.pdf

Initial list of impacted P/G's was sent out by Heather Offhaus on 9/16/15 to PAAC and GPAC. As your impacted projects near the start date of the next budget period, you will receive communications from Sponsored Programs based on the handout. Balances and deficits will be moved forward to the new P/G.

Any feedback about how the process is going can be sent to Heather Offhaus.

3. Follow-up from previous PAAC meeting from the SSC Accounts Receivable.

The capability to view imaged checks or wire transfers is available in M-Pathways. An e-mail with details was sent to PAAC by Jamie Zawistowski was sent on 10/28/15.

May need additional OARS access: "FN View ACC RECV"

(no job aide available)

Wolverine Access/Faculty & Staff/Financials & Physical Resources System/Accounts Receivable/

Customer Accounts/Item Information/Item Activity Summary

Business Unit- use hour glass and search for SPFED or SPNON (Sponsored Fed or Non-Fed)

Customer ID – P/G number

-Future enhancement of having the image links for AR available in MReports is still in the ITS work queue.

-e-form for submitting Unit invoices to Accounts Receivable is still in process. This would help to clarify what information the unit needs to provide when submitting a request to AR.

4. Imaging Services Upgrade- Webnow users should not notice any changes. If issues come up, please contact Emily Hamilton. <http://documentation.its.umich.edu/imaging-services/imaging-services-upgrade-december-2015-overview-changes>

5. Changes to OARS- With the release of the new OARS system in early December, the navigation for the PR Casual Receiving User role and PR Form Purch User role has changed. In the Role Selection Tool, you need to select, Central Office/Financials & Physical Resources/Procurement to find the roles.

Training Grants Management

The Training Grants Subcommittee (Marni Arnett, Megan Diffin, Lisa Dwyer, and Dianne Gagne) have been working on a document to help with Training Grant administration. The guide will be released in early 2016. It currently includes info on xTRAIN, stipends, benefits, and shortfalls, and also includes some recommendations for how to use MReports. A tracking system outside of MReports is necessary, and in the future, we will work to determine a best practice for how to handle.

If your department has a sample of your tracking system that you would be willing to share, please e-mail it to Emily Hamilton. We are mostly looking to figure out best formatting, which fields to capture and why, etc.

At the meeting, there was a discussion around how to handle UG-monitored items in pre-award. This has been referred to the Dean's Office for follow-up.

VMI Updates and Forecasting Tool Discussion:

"All 12 Finance VMI projects have been reviewed by the Finance steering committee and tagged for further discussion. These teams ranged from addressing financial training and reporting, to use of the campus Shared Service Center and post-award administration.

The specific project focused on post award administration was initially tasked with exploring the concept of a Center of Excellence for post award. While the group was considering aspects of the prospective center, several items were identified as needed before a COE could be considered. Additionally, the group recommended that the post-award initiative fall outside of Finance and be aligned with the Office of Research.

At this point, a steering committee (similar to the group overseeing the Finance VMI projects) will be formed. It is likely that the most immediate effort will be concentrated in three areas:

- A position to lead policy & procedures for post-award
- Training opportunities in post-award
- More robust reports and forecasting tools

Also note that the foundation for the policies & procedures will largely be what came out of the LEAN process. And as work goes forward in the Clinical Trial Nodes, we will be staying as consistent as possible!

Questions may be directed to Heather Offhaus, in the Grants Office, as the process continues to evolve."

Forecasting/Reporting- Thinking bigger than the Excel tool we currently have. We need information from you in order to develop the requirements for future tools. Please consider what features or functions you and/or faculty would need for projecting and modeling. **Send your comments to Emily Hamilton, by January 8th.**