Welcome to the IRP Hypercare Support Sessions for Grants

We will begin shortly - please note:

- We have muted your audio and turned off your camera to ensure higher quality sound during the session. Please ensure your audio and camera remain off throughout the entire presentation.

- If you have a technical issue during the session, please use the chat feature.

- We will answer questions throughout the session as time allows.

To ask questions…

- Click on the Q&A icon at the bottom of your screen in Zoom
- Type in your questions and view questions from colleagues
- Upvote your colleagues’ questions by pressing the “thumbs up” next to the question
INTEGRATED RENEWAL PROGRAM

Hypercare Support Sessions for Grants

Allison Kim - IRP Finance Grants Lead
Marko Coric - IRP Finance Analyst, Grants SME
Matthew Degraaf - IRP Business Analyst
Krisch Pelingon - Manager, Research Accounts Receivable
Evelyn Miguel (Panelist) - Associate Director, Research Finance
Claudia Ramos (Panelist) - Research Project Analyst, Research Services

December 8–16, 2020
We acknowledge that UBC's two main campuses are located on the traditional, ancestral and unceded territories of the xʷməθkʷəy̓əm (Musqueam) and Syilx (Okanagan) peoples, and that UBC's activities take place on Indigenous lands throughout British Columbia and beyond.
WHO HAS BEEN INVITED TO THIS SESSION?

Who are invited?

- Finance employees supporting PI’s, i.e., people with the following security roles:
  - Grant Financial Analyst
  - Cost Center Financial Analyst
  - Cost Center Payroll Financial Analyst
  - Grants Manager (Staff only, not Faculty)

- Finance Directors and Transition Network

Faculty of Arts
Dec 8 2020

Faculty of Science
Dec 9 2020

Faculty of Applied Science
Dec 10 2020

Faculty of Medicine
Dec 14 2020

UBCO
Dec 15 2020

Open to All Faculties
Dec 16 2020
INTRODUCTIONS

Allison Kim
IRP Finance Grants Lead

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TODAY’S DISCUSSION

Purpose

- Address common grants related Q&As identified after go-live
- Provide best practices and guidance
- Open Q&As.

Key themes identified:

1. General Q&As
2. Research Grants Dashboard Reports
3. Grants related Security Roles
4. Grants vs. Award Recap
<table>
<thead>
<tr>
<th>Q</th>
<th>Who to contact for changes to Grants’ Cost Center, Award and/or Grant?</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>• Cost Center changes: contact the <strong>Research Officer</strong> assigned to the grant</td>
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<td></td>
<td>• Activity additions or changes: use the Workday FDM request framework</td>
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<td></td>
<td>• Closing award and/or grant: contact the <strong>Research Finance Officer</strong> assigned to the grant</td>
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<table>
<thead>
<tr>
<th>Q</th>
<th>Who can perform an interfund transfer for Grants in Workday?</th>
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<tbody>
<tr>
<td></td>
<td>All interfund transfer with grant Worktags <strong>must</strong> go through Research Services.</td>
</tr>
<tr>
<td></td>
<td>Contact the <strong>Research Officer</strong> assigned to the grant</td>
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<table>
<thead>
<tr>
<th>Q</th>
<th>Were all legacy FMS grant related Program codes converted into Workday?</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Some legacy grant related FMS program codes were converted into activity Worktags, <strong>without</strong> financial data, and activity codes <strong>do not</strong> contain speedcharts</td>
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RESEARCH GRANTS DASHBOARD REPORTS

Common Q&As

• How can PIs with multiple roles navigate the Research Grants Dashboard
• Positions Being Paid From Grants: visibility based on user’s assignment to the SupOrg Structure
• UBC Payroll Accounting Validation Errors by Organization is useful for Cost Center Payroll Analyst

Demos:

• Research Grants Dashboard Navigation
• Grants Ledger Summary Report
• View Spend Restriction report
• UBC Payroll Accounting Validation Errors by Organization Report
Please note that we are editing the videos containing the demonstration of the reports, and will be providing them later.
SECURITY / ACCESS REQUESTS

Grant Financial Analyst = view only
Grant Manager = approval + access to payroll details

For security / access requests, have a conversation with your supervisor to determine what access you require:

• **If you require Grant(s) specific access** (i.e., Worktag in Workday is for Grant(s)):
  ○ Contact PI or Amin PI to add relevant access *(job aid)*;
  ○ If the PI / Admin PI cannot add relevant access, submit a ServiceNow ticket and attach approval from PI / Admin PI approving relevant access to the specific Grant ID

• **If you require Cost Center (CC) wide access, or access to a Worktag that is not Grant(s)**
  ○ Contact the Department Administrator of the CC or the CC Manager who will work with your faculty’s Finance Director to add your request to a batch load to Workday. Please also clarify if visibility into payroll details is needed.
GRANT VS AWARD RECAP

The basic form of an award in Workday consists of:

- **Award**: Defines the overall parameters based on agreement / documentation.
- **Award Line**: Defines the grant start/end date, as well as F&A rates, and the nature of funding.
- **Grant**: Is the equivalent of a PG in FMS. It defines default and allowed worktags, and grant roles including Grant Manager for signing authority.

Note: Transactions consider a combination of data from award line and grant. Each award line is linked to only one grant, so in this context, award lines = grant.
ID Naming Convention

Always start with **AWD**

Followed by “-” and 6 digits (sequentially generated by RISE)

Example: AWD-000001

Awards Define:

- **Overall Award Schedule** based on the agreement-all award line start and end date must be encapsulated by the award schedule start and end date
  - **Start Date**: Equal to the contract start date unless there is a sponsor agreed pre-spending date
  - **Contract Start Date**: start date according to the agreement
  - **Contract End Date**: end date according to the agreement
  - **End Date**: Equal to the contract end date unless there are no-cost extensions
- **Budget**: budgets are defined at grant level
- **Sponsor**: all award lines within the award will have the same sponsor
- **Overall Funding Details**: total awarded by the sponsor per the agreement
GRANT VS AWARD RECAP: AWARD LINE LEVEL

Award Lines Define:

- F&A Rate Agreement (indirect cost of research) - Rates used are automatically calculated when an expense is posted

Award Line (and essentially Grant) start and end date

  - used in custom validation of expenses
  - Costing allocation **has to be** within the start and end date of the Award line
  - Costing allocation **has to have** an end date

Billing Considerations: Cost Recovery vs Cost Reimbursement

  - **Cost Recovery** refers to payments not related to the sponsors funding agreement for the grant (ie: not from the sponsor) – these do not require an invoice to be raised in WD
  - **Cost Reimbursement** refers to funds received from the sponsor per award agreement stipulating invoicing to the sponsor by costs incurred for specific periods

For more information related to depositing grants revenues, grants-cost recovery, and non-grant funds, please refer to the established guidelines in the Research Finance website: [https://finance.research.ubc.ca/policies-guidelines/guidelines](https://finance.research.ubc.ca/policies-guidelines/guidelines)
GRANT VS AWARD RECAP: GRANT LEVEL

Grant Naming Convention (5 elements)

- Speedchart
- Grant ID
- Sponsor Abbreviation
- Application Year
- PI’s Last Name

Example: NMTF GR000013 INNOVABC 2018 Carrillo

Grants Define:

- Fund (default and allowed)
- Function (default and allowed)
- Cost Centre (default and allowed)
- Activities (allowed but no default)
- Costing allocation should be done at the grant level, not at the cost center level

- Grant Roles:
  - Grant Manager = the signing authority
  - Research Finance Officer = your main research finance contact
  - Research Officer = your ORS/UILO contact

- Default means these populate automatically when you enter the grant in any transaction field requirement
- Allowed means you are able to use this when to replace or to add the worktag
GRANT VS AWARD RECAP: SUBRECIPIENTS

Subrecipient Naming Convention:

Example: NMTF GR011746 INNOVABC 2018 Carrillo TERRAMER

Subrecipient Notes:

• Subrecipients grants are only required to be created if there is reporting involved with the sponsor to report the specific expenses reported back by the subrecipient institution. (ie: Tri-Agency)

• No costing allocations should be directed to subrecipient grants as these are paid to external institutions, and reported subsequently back to UBC at year end

• Transactions should NOT be posted on subrecipient grant unless it is for Grant Subaward External, which requires specific instruction from UILO/ORS upon signing of the agreement with the external institution
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Key Grants Links

- [Link](#) to IRP Researcher Events
- [Link](#) to Job Aid on Initiate Adding Additional Signing Authority
- [Link](#) to Job Aid on FDM Change Request Framework
- [Link](#) to Job Aid on Research Grants Dashboard: Custom Reports
- [Link](#) to Research Finance Guidelines
The Integrated Renewal Program would love to hear from you! If you have any questions or comments please get in touch.

[Website: irp.ubc.ca]
[Service: https://ubc.service-now.com:selfservice]