ERA Update

Jonathan Lew, eRA Officer
Barbara Inderwiesche, Assistant Director, eRA
ERA Systems Update

• Fastlane → Research.gov
  – First step in transition: Some Notifications & Requests
    • Requests to adjust Salaries of Admin or Clerical Staff
    • Travel Costs for Dependents
    • Additional categories of participant support costs

• NIH eRA Commons
  – Commons IDs required for all individuals listed in the RPPR
  – Monthly delegation update to Principal Investigators for RPPR submission
KC Proposal Cleanup Project

• “Finalize” process
  – Why is this important?
    • Data Warehouse, department numbers, UCOP

• Proposals currently not finalized
  – Alternative to using Data Warehouse
    • Development Proposal Search in Zotportal

• Proposals returned for revisions
  – Check your Action List

• Developing regular processes for follow up
KFS PURAP for Subawards
KFS/PURAP for Subawards

• Only for actions that correspond to a new or amended subaward agreement
• Start PO/POA process as soon as copied on email to sub-site when
  – Check route log: REQS and POAs are routed through department’s accounting line reviewers and fiscal officers
• Subrecipient Request Form (SRF) MUST be submitted before submitting a REQS or POA
• Vendor MUST be onboarded before you can submit a REQS
• Make sure all REQUIRED fields are completed
  – Per SPA instructions
• When submitting a POA, clearly state reason
• Follow up in KFS for status of PO/POA
  – Remember there isn’t an option to return for edit. If errors need to be fixed, the PO/POA is disapproved.
  – Check Action List
1. Send Subrecipient Request Form (SRF) to subawards@uci.edu

1.a. Verify that subrecipient has been set up in KFS vendor database (link to vendor database is on SRF)

1.a.i. If not, send link to subrecipient to KFS vendor onboarding process (link is provided on SRF)

1.b. SRF includes a place for UC Account and UC Fund

2. Negotiate subagreement with subrecipient

3. Create subaward synopsis cycle (in order to generate subk# for subagreement)

4. Send UNSIGNED agreement to subrecipient and CC: Department

5. Enter requisition in KFS PURAP module

6. Receive partially executed back from subrecipient

7. Review and approve PO in KFS

8. Sign agreement and send fully executed back to subrecipient and CC: Department and our PI

9. Add PO# to subaward synopsis. Enter and review remaining data fields

10. Finalize subk synopsis in SPA database (email sent to department)
Kuali Coeus Updates
Data Warehouse

• Research Administration Data Warehouse project
  – Research Administration data in Cognos (similar to Decision Support Services)
• Data Warehouse specialist
• Identifying common canned reports for use (eg. annual and quarterly reports)
• Common report requests
• Campus working group on identifying needs
• Research Administration data dashboard
• Timeline: Now – 06/30/2017
KC Award and Subaward Modules

• Integration with KC Proposal Development
• Integration with KFS
• Reporting Requirements, Terms and Conditions, Funding Levels, Detailed Budget
• Now-06/30/2015: Analysis and Fit gap
• 07/01/2015-06/30/2016: Implementation
KC COI Module Update

• KC Business Analyst Kim Frazer
• Financial Entities
• Project based disclosures
• Integration with KC Proposal Development

• **Phase I: PHS**
  – Now- 06/30/2015: Fit gap and configuration
  – 07/01/2015-06/30/2016: Implementation

• **Phase II: NSF**
  – 07/01/2015-06/30/2016: Fit gap, configuration and implementation

• **Phase III: State**
  – 01/01/2016-12/31/2016

• **Phase IV: IRB**
  – 07/01/2016-06/30/2017
KC Negotiation Module

• Purpose
  – Faculty, management, and administrators
  – Status of agreement processing
  – Receipt date, status, negotiation start and end dates, etc.

• Implementation Status
  – Pilot with SPA Officers and Management

• We need your feedback!
  – Sending survey through campus listservs
Cayuse 424 Phase I

• Option to use Cayuse 424 instead of SF424 forms
• Cayuse 424 is not replacing KC
• Location for Cayuse 424 link on Abstracts and Attachments tab in KC
• Received onsite training
• Refining data in production instance for Single Sign On (SSO)
• Drafting campus communications
• Timeline: now-12/31/2015
Cayuse 424 – First Implementers

- School of Social Sciences
- School of Medicine
- School of Biological Sciences
- School of Physical Sciences
- Pharmaceutical Science
- Nursing Science
- Public Health
- Beckman Laser Institute
- Stem Cell Research Center
Cayuse 424 Phase II

• Data Integration between Cayuse 424 and KC
• Data will sync back and forth
• Department focus / working group
• Timeline
  – Now-12/31/2015: analysis, configuration and testing
  – 01/01/2016-12/31/2016: Phase II implementation
KC Proposal Reminders

• KC Support transitioned from Tracks to ServiceNow
• Click the “Close” button instead of “x-ing” out of the browser window
• Fellowships with TBD fellows are ok. Validation warning only.
• Save often!
Training Opportunities

• Hands-on training available
  – eRA Office Hours
  – Register in UCLC by searching “ERA”

• Cayuse 424 training for first implementers will be coordinated in the coming weeks/months.

• Sign up for the kc-project *and* SPA listservs!
  – Send blank email to:
  – kc-project-join@uci.edu
  – or-spa-join@department-lists.uci.edu
Questions?

- **Barbara Inderwiesche, Assistant Director, eRA**
  - (949) 824-4789
  - Barbara.i@uci.edu

- **Jonathan Lew, eRA Officer**
  - (949) 824-1233
  - Jlew@uci.edu

- **Alison Yeung, KC Business Analyst – Cayuse 424**
  - (949) 824-2644
  - Alison.yeung@research.uci.edu

- **Kim Frazer, KC Business Analyst – KC COI**
  - kmfrazer@uci.edu