RAPID Update

Research Administrators Forum (RAF)
February 2010
Agenda

• RAPID Updates (Nate Haines)
• Financial Reporting Project Update (Jessica Lee)
• Closeout Tools (Raellen Man, Jennifer Aguilar)
RAPID Updates

Presenter: Nate Haines
RAPID Projects/Priorities

- Effort Reporting
- Cost Transfers
- Proposal/Award Tracking
- InfoEd Improvements
- Performance Metrics and Measurement
- PI Dashboard
- Invoicing
- Award Set-up

- OHRPP Operations
- ORA Portal
- ARRA Reporting
- Staff Training
- Letter of Credit (LOC)
- webIRB/OHRPP
- OARO - TBD
- Financial Reporting
Financial Reporting Project Update

Presenter: Jessica Lee
Project Overview

Background
- Most sponsors require UCLA to report how money was spent during an award
- Sponsor deadlines typically 90 days after award end date
- Payment to UCLA often dependent on financial report submission

Project Driver
- Address the cause of delays in on-time submission of financial reports to sponsors
Project Goal

- Develop a single *web-based system* that can be used by departmental fund managers and EFM to manage the development and submission of financial reports to the various sponsors.

- Post Award Management System (PAMS)
Expected Results

- Better integration of technology - SINGLE SYSTEM!!
  - Integrated data retention and historical information
  - Increased efficiency, reduced handoffs
- Standardization of submission process across EFM and campus
  - Ability to track internal turnaround times for financial reports
  - Ease of training through standardization
- Efficient and accurate financial reporting
- Improved compliance and management information
- On time submission of financial reports
- Reduction of revised financial report submissions
- Improved accountability and visibility into roles and responsibilities
- Improved communication and collaboration between EFM and campus
- Increased faculty involvement and awareness
- Culture change!
Project Organization

- Project Management
  - Functional
  - Technical
  - Vetting/Communication
  - Testing/Rollout
  - Leadership Involvement/Policy Enforcement (LIPE)
  - Functional Subteams
Current Team Members

**ORA**
- Marcia Smith

**EFM**
- Jennifer Aguilar
- Brian Atienza
- Evelyn Balabis
- Jevon Echave
- Willian Paja
- Maurice Taylor
- Winny Migletz

**OCGA**
- Cindy Gilbert
- Martha Hansen
- Linnaea Mallette
- Miesha Bailey

**Campus Representation**
- Ned Avejic
- Nancy Blumstein
- Karla Breen
- Rory Constancio
- Duy Dang
- Michelle Deluca
- Robert Duncan
- Mike Hassanvand
- Alan Illescas
- Sheila Jefferson
- Kathy Kawamura
- Raellen Man
- Jim Nakatsuka
- Neda Navab
- Terry Novorr
- Michelle Phillips
- Cathy Rujanuruks
- Lana Song
- Keith Steele

**ORIS**
- Jackson Jeng
- Jessica Lee
- Terry Wingo
- Mila Remigio

**Huron**
- Nate Haines
- Sarah Horner

To Get Involved:
RAPIDfeedback@research.ucla.edu
# Financial Reporting Timeline

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<th>2010 (JAN – DEC)</th>
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<td>Pilot 3/1</td>
<td>Deployment Goal</td>
<td>3. PAMS Enhancements</td>
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<td>2. PAMS System</td>
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- **2009 (OCT – DEC)**: Early Initiatives
  - 1. Smart Closeout Tool: Pilot 3/1
  - 2. PAMS System

- **2010 (JAN – DEC)**: Early Initiatives

- **2011 (TBD)**: Early Initiatives
  - 3. PAMS Enhancements
Early Initiatives

- Define EFM closeout requirements
- Standardize closeout packet/tools for schools and departments
- Migrate 30 day reminder communications to new system
- Provide users ability to run FS reports (made available through the ORA portal) for expenses
  - After fund end date
  - On unallowable/warning object costs
  - From subcontracts/subgrants
  - From intercampus agreements
- Improve accuracy of FSR due reports by addressing the MFNOA issue
Phase 1: Closeout Tool

Milestones

- COMPLETE: Functional Requirements Signoff
- 2/28/2010: Training Documentation Complete
- 6/30/2010: Campus-Wide Rollout
Phase 2: PAMS System

Milestones

- COMPLETE: Phase 1 Requirements
- 3/31/2010: Phase 2 Requirements
- TBD: Timeline Reassessment

Phase 3: PAMS Enhancements

- TBD: Enhancement list and Timeline
Smart Closeout Tool Demo

Presenters: Raellen Man & Jennifer Aguilar