Agenda

• Meeting Agenda

• Welcome and Announcements
  ▪ Marcia Smith, Office of Research Administration

• Addressing NIH Data Sharing Policies
  ▪ Lisa Federer, Research Informationist, UCLA Louise M. Darling Biomedical Library

• Contract and Grant Administration
  ▪ Heather Winters and Kim Duiker – OCGA Updates

• Post-Award Management System (PAMS) Status Report
  ▪ Yoon Lee, Extramural Fund Management

• Questions and Discussion
Introduction of Additional Casual-Restricted Student Titles

- As part of the UC Path initiative, in August 2012, departments were asked to transition students from staff titles to student assistant titles. At that time, titles were not available for specific functions such as Student Researcher, Student IT, Student Events, etc.

Office of the President, Human Resources has established new functional titles codes to more accurately identify the work performed by casual-restricted employees. The titles and title codes listed below are now available for use. The Campus Title and Pay Plan has been updated to include the new titles and their corresponding rates. Please note that these titles are eligible for a shift differential of $.62/hour.

- As departments begin hiring/rehiring casual-restricted employees for Fall Quarter 2013, please pay special attention to moving all students out of staff titles. We request that any student, who did not originally transition out of a staff title, be moved into a student title by January 2014.

- **Departmental Actions to be Taken for Transition to Student Classifications**
  
  - Review new title codes for student classifications
  - New appointments of casual-restricted students beginning Fall Quarter, 2013 should be classified in a student title codes.
  - Move existing casual-restricted student appointments to one of the student classifications as well. We encourage departments to complete this process by January, 2014.
  - Update EDB to reflect the new title and title code.
  - If you have any questions or need assistance in determining the appropriate classification, please contact your Compensation Analyst for assistance. Additional EDB processing instructions will be sent under separate cover.
## ADDITIONAL STUDENT TITLES FOR CAMPUS USE

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</table>

*Student Summer Camp Offsite not eligible for Shift Differential
Addressing NIH Data Sharing Policies

Lisa Federer, Research Informationist
UCLA Louise M. Darling Biomedical Library
What are data sharing policies?

• May require grantees to make data arising from federal funding publically available

• Usually require submission with the grant proposal of a plan for how data will be shared, managed, and/or preserved
NIH Data Sharing Policies

- NIH Data Sharing Policy
- NIH Grants Policy Statement (2.3.11.2.3 Access to Research Data)
- For full list of NIH policies, see http://grants.nih.gov/grants/sharing.htm
Sharing Policy Applicability

- applicants seeking $500,000 in annual direct costs
- applications submitted after October 1, 2003
- final research data for research purposes
- all types of research data (clinical/basic science), especially unique data
But change may be coming...

• Feb 22, 2013 OSTP policy memo
  http://www.whitehouse.gov/administration/eop/ostp/library/publicaccesspolicy

• “To the extent feasible...digitally formatted scientific data resulting from unclassified research supported wholly or in part by Federal funding should be stored and publicly accessible to search, retrieve, and analyze.”

• 6 month deadline for agencies to define a policy
Components of the NIH Application

• Data Sharing Plan (or explanation of why data sharing is not possible)
• Budget/Budget Justification
• Background and Significance Section
• Human Subjects Section
Data Sharing Plan

- schedule for sharing
- data formats
- documentation and/or analytic tools provided with datasets
- data-sharing agreement
- mode of data sharing

From Wikimedia Commons – German Federal Archives
Schedule for Sharing

- “timely fashion”
- release no later than acceptance for publication of main findings
- for epidemiological or longitudinal studies, release data in “waves” as available
Special Considerations: Withholding Proprietary Data

- Small Business Innovation Research (SBIR) grantees = up to 4 years
- Private sector co-funding = 30-60 days

*From Flickr– Username: m thierry*
Data-sharing Agreements

• outline requirements for ensuring privacy and confidentiality
• stipulate provisions for how shared data may be used
• may include penalties for violating agreement
Modes for Data Sharing

under the auspices of the PI

in a data archive

in a data enclave
Budget and Budget Justification

• include request for funds for sharing/archiving
• need assistance on estimating costs for data preparation and archiving? Ask a librarian!

From Flickr– Username: 401(K) 2013
Human Subjects Section: Addressing Privacy

- strip identifiers from data
- indirect identifiers and “deductive disclosure”
- restricted data enclaves
- data-sharing agreements

From Wikimedia Commons – National Cancer Institute
DMPTool: http://dmp.cdlib.org

Create ready-to-use data management plans for specific funding agencies.

Recent DMP News
- DMPTool Project — August 2013 Report
- Report on DMPTool at ESA 2013
- Digest: Upcoming DMPTool Activities

More news >
Additional Resources

- NIH Data Sharing Overview: http://grants.nih.gov/grants/policy/data_sharing/
- Full list of NIH sharing policies by Institute: http://www.nlm.nih.gov/NIHbmic/nih_data_sharing_policies.html
- Example data sharing agreements from NCI: https://wiki.nci.nih.gov/display/DSIC/Data+Sharing+Agreements
- Sample plan from NIH (Word doc): http://grants.nih.gov/grants/sharing_example_data_sharing_plan.doc
Getting Additional Help

• Biomedical Library Reference: biomed-ref@library.ucla.edu
• Library guide to NIH Sharing Policy (including video of full data sharing workshop): http://guides.library.ucla.edu/datasharing
• Library guide to NIH Public Access Policy: http://guides.library.ucla.edu/nih
Questions?

http://www.library.ucla.edu/biomed
Today’s Topics

- OCGA Updates – Heather Winters
- EPASS Helpful Tips – Heather Winters
Quick Updates

OCGA Staffing Update

• New additions to the Grants Team
  ▪ Yessenia Sarmiento – Senior Grant Analyst
  ▪ Linda Phung – Grant Analyst
ePASS Helpful Tips

• The ePASS provides:

✔ A checklist of items to be addressed as part of proposal development and submission

✔ Approvals and certifications required in accordance with University and sponsor policies

✔ Endorsements required from other University officials
ePASS Helpful Tips

• When in doubt – read the instructions
• Fill in the blanks
  ▫ EVERY question needs an answer
• Accuracy
  ▫ Correctly identifying ‘yes’ or ‘no’ in Section 6 helps ensure compliance, identify risks, confirms approvals
• Utilize hyper-links
  ▫ Directs links to related policy
  ▫ Directs to additional forms and/or requirements
  ▫ Provides added guidance to questions not answered in the ePASS Instructions
Section 4: Award/Proposal/Program Type

**Award Type:** Select the anticipated type of funding mechanism from the drop-down menu based on the descriptions provided below:

<table>
<thead>
<tr>
<th>Award Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>Agreement to provide support for research or other activities in return for a set statement of work or deliverables.</td>
</tr>
<tr>
<td>Cooperative Agreement</td>
<td>An award in which the funding agency remains involved in the research or project during its performance by the receiving entity.</td>
</tr>
<tr>
<td>Grant</td>
<td>A financial assistance mechanism to support the conduct of research or other activities as described in a general scope of work.</td>
</tr>
<tr>
<td>Subcontract</td>
<td>Agreement under a prime contract to another entity that provides support to UCLA for research or other activities in return for a set statement of work or deliverables.</td>
</tr>
<tr>
<td>Subgrant</td>
<td>Agreement under a prime grant award to another entity that provides financial assistance to UCLA to support the conduct of research or other activities as described in a general scope of work.</td>
</tr>
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</table>
ePASS Helpful Tips – Section 4.

4. **Award/Proposal/Program Type**
   - **Award Type:** [Dropdown]
   - **Proposal Type:** [Dropdown]
   - **Program Type:** [Dropdown]
   - **Special Program Type:** [Dropdown]
   - If this EPASS relates to an existing Award or Master Agreement, select an **Action Type:** [Dropdown]
   - **Current Sponsor Award/ID #:** [Field]

**Proposal Type:** Select the appropriate Proposal Type from the drop-down menu based on the descriptions provided below:

<table>
<thead>
<tr>
<th>Proposal Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
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<td>New</td>
<td>A new proposal.</td>
</tr>
<tr>
<td>Competitive Renewal</td>
<td>A competitively reviewed proposal requesting additional funds and an additional project period beyond the current project period.</td>
</tr>
<tr>
<td>Preliminary Proposal</td>
<td>A brief description, usually 2-10 pages, of research plans and estimated budget that is sometimes submitted to determine the interest of a particular sponsor prior to submission of a formal proposal. Also termed &quot;pre-proposal.&quot;</td>
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<tr>
<td>Resubmission - New</td>
<td>A proposal that is a resubmission of a previously declined proposal.</td>
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<tr>
<td>ResubmissionCompetingRenewal</td>
<td>A proposal that is a resubmission of a competitive renewal that was previously declined.</td>
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<tr>
<td>Supplement</td>
<td>A separate proposal for additional funding and scope to be added to a fully-executed grant or contract.</td>
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<tr>
<td>Modification/Amendment</td>
<td>Modification to an existing fully-executed grant or contract.</td>
</tr>
<tr>
<td>Transfer (in)</td>
<td>An award that is being transferred from another institution to UCLA.</td>
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</tbody>
</table>
FOA/RFA/RFP # (if applicable): If this proposal is in response to a specific funding opportunity, please indicate the announcement number and provide a copy of the announcement, or a hyperlink if available on a publicly accessible website. For all Grants.gov applications, indicate the FOA number and hyperlink.

Prime FOA # (if different): If this is a subaward proposal, and the prime sponsor has a different announcement number, provide the prime sponsor's information as requested above.
ePASS Helpful Tips – Section 5.

**Sponsor Due Date/Time (Pacific):** Indicate the date and time that the application is due to the sponsor. For subawards, the sponsor is defined as the entity to which UCLA is submitting the proposal. If no deadline or “ASAP” is indicated, a standard deadline of five business days from date of receipt will be used.

**Deadline Type:** Select the applicable deadline type from the drop-down menu. If sponsor requires both electronic and hard-copy submission, provide additional information in Section 9: Remarks.
Sponsor Name: Indicate the name of the entity to which UCLA is submitting the proposal.

Contact/Email Address/Phone #: Enter the name, e-mail address and phone number of the individual to whom the proposal should be directed. If this application requires hard-copy submission, enter the mailing address in the remarks section. Note that all applications that are shipped via private carrier require a phone number and street address.

Prime Sponsor Name (if applicable): If the application is for a subaward (subcontract, subgrant, or MCA), provide the name of the prime (originating) sponsor.
ePASS Helpful Tips

QUESTIONS
Project Update
Yoon Lee
EFM Assistant Director
PAMS Project Director
Agenda

- What is PAMS?
- PAMS: Daily Fund Management Tool
- Pilot Status
- Pilot Group Demographics
- Pilot Timeline
- Q&A
What is PAMS?

- Web-based Post Award Management System that displays near real-time data to facilitate more efficient and effective financial management of sponsored awards and financial compliance oversight

Who is PAMS for?

- Department & EFM fund managers and management teams who conduct post award management activities including invoice/report submission to sponsors and fund closeout

What are PAMS key benefits?

- Allows users to review, edit, and approve financial activities on-line in a single system and to communicate the status in real time.
- Provides customized worklist for individual user to prioritize work and monitor progress to achieve a higher level of compliance.
PAMS: Daily Fund Management Tool

- **My Funds**
  - At a glance work list updated in real-time.
  - Help ensure a higher level of compliance
  - Easy to prioritize work every day.
  - Fund managers can view individual work list.
  - Managers can view work lists for the team.
PAMS: Daily Fund Management Tool
PAMS: Daily Fund Management Tool

- **Administration**
  - Department Administrators can assign specific fund managers to specific funds based on their own structure.
    - By department, sponsor type, award type, PI, fund number, and etc.
  - Fund Managers have access to financial information only for the funds they are assigned to.
    - Help enforce more granular level of security
## Provision List

### Get Fund:
- Fund No: 22222
- Pt: Lee, Jessica
- Sponsor: NIH
- Award: SP30 CA09335-01

### Report and Invoice Schedules

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<td>A.Tran</td>
</tr>
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</table>
PAMS: Daily Fund Management Tool

- **Provision**
  - Fund managers can check the status in real time.
  - Fund managers can retrieve a copy of invoice or financial report at any time.
  - Sr. Fund managers can edit invoice or financial report as required once PAMS generates a draft.

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### Provision List

<table>
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<tr>
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### Financial Summary

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<th>Appropriation</th>
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<th>Encumbrances &amp; Memo-Liens</th>
<th>GL Balance</th>
<th>Pending GL Posting</th>
<th>Current Balance</th>
<th>Pending Review</th>
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<td>Direct Expenses</td>
<td>$239,500.00</td>
<td>$236,065.71</td>
<td>$0.00</td>
<td>$3,434.29</td>
<td>($345.64)</td>
<td>$3,779.93</td>
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<tr>
<td>F&amp;A (8%)</td>
<td>$14,500.00</td>
<td>$18,885.26</td>
<td>$0.00</td>
<td>($4,385.26)</td>
<td>($27.65)</td>
<td>($4,357.61)</td>
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<tr>
<td>Total</td>
<td>$300,000.00</td>
<td>$299,404.95</td>
<td>$0.00</td>
<td>$596.05</td>
<td>$1,172.73</td>
<td>($577.68)</td>
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<td>$4,395.49</td>
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</tbody>
</table>

### Expenditure Review
- Expenses Outside Period - Non Payroll
- Expenses Outside Period - Payroll
- Unallowable/Warning Codes
- Administrative Salaries
- Subawards
- Encumbrances & Memo-Liens
- Salary Over the Cap
- Additional Cost Transfers
- Cost Share
- F&A Reconciliation
- Fund Balance and Approvals

### Summary by Sub
- GL Detail Summary
- GL Detail Transactions
- Payroll by Person

### Transactions
PAMS: Daily Fund Management Tool

- **Closeout**
  - Monthly review and reconciliation facilitates effective closeout.
  - Fund managers can view and reconcile the current fund status any time throughout the lifecycle of the fund.
  - Compliance dashboard will facilitate fund manager’s monthly reconciliation.
  - Minimum reconciliation to perform at the fund end.
PAMS Pilot Status

- Conducted instructional meeting with pilot user groups
- Collected PAMS Access Forms for all pilot user groups
- Finalized and assessed the pilot group
# Pilot Demographics

<table>
<thead>
<tr>
<th>Org/Schools</th>
<th>Department</th>
<th>Users</th>
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<tbody>
<tr>
<td>Medicine</td>
<td>28</td>
<td>41</td>
</tr>
<tr>
<td>Letters &amp; Science</td>
<td>8</td>
<td>14</td>
</tr>
<tr>
<td>Engineering &amp; Applied Science</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>School of Public Health</td>
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<td>5</td>
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<tr>
<td>NPI</td>
<td>1</td>
<td>14</td>
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<tr>
<td>Basic Biomedical Sciences</td>
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<td>6</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>44</strong></td>
<td><strong>92</strong></td>
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</tbody>
</table>
PAMS Timeline

- Application Development: Aug - Oct
- Testing: Sep - Nov
- Training: Oct - Dec
- Pilot Deployment: Dec - Jan
- Pilot Go Live: Jan

9/12/2013 RAF: Post Award Management System
PAMS Support

Contact us
- Email: PAMSHelp@research.ucla.edu
- Phone: (310) 794-0008

Technical & Business Analyst Teams