Extramural Fund Management

November 8, 2018
Agenda

- Distribution of Stipend Payments
- UCPath Distribution of Payroll Expenditure Report
- New Version of the RAPID Tool for UCPath
- Next Release of Effort Reports
Distribution of Stipend Payments
Distribution of Stipend Expenses

Expense Distribution of Stipends Processed in UCPATH

• For stipend payments processed in UCPATH:
  ◦ There is no validation requiring 78xxxx Accounts be used for Post doc stipends.
  ◦ Ensure 78xxxx Accounts are used in the Earning Distribution section on the Fund Entry page
  ◦ Review and correct Earning Distributions which list other Accounts, Ex. 40xxxx, 43xxxx.
UCPath Distribution of Payroll Expenditure Report
Distribution of Payroll Expenditure Report

How to Locate the Report

1. Click on "UCPath Reports".
2. Select "Systemwide Reports".
3. Click on "Payroll".
4. Choose "Distribution of Payroll Expenses (DOPE)".
Distribution of Payroll Expenditure Report

The Current Status

- The report is available in the Campus Data Warehouse.
- A workgroup has been formed to discuss possible enhancements to the report.

<table>
<thead>
<tr>
<th>Workgroup Members</th>
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<tbody>
<tr>
<td>David Beckstrom</td>
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<tr>
<td>Eugene Harrison</td>
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<td>Troy Romero</td>
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- The DOPE report should be used for interim invoices or financial reports for the period beginning September 2018, which require the payroll detail reports as supporting documentation:
  - The report is available to be downloaded to Excel
New Version of RAPID Tool for UCPath
New version of the RAPID Tool will be released to campus as soon as testing has been completed.

Testing began on November 7, 2018.

New version will contain updated payroll reports for use with UCPath data.

Training grant worksheets still in development and will be released as soon as available.

UCPath payroll reports:

<table>
<thead>
<tr>
<th>Included in Next Release</th>
<th>Included in future release</th>
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<tbody>
<tr>
<td>• Payroll After Fund End Date</td>
<td>• Training Grant – Postdoc Allowable/Unallowable Benefits</td>
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<tr>
<td>• Employee Sum</td>
<td>• Training Grant Benefits</td>
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<tr>
<td>• Admin Salary</td>
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<td>• ERS Detail Reports</td>
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Next Release of Effort Reports
Next Release of Effort Reports

The Current Status

• First round of in-depth testing began on October 11, 2018.
• Issues identified and reported back to UCOP and UCPath development teams.
• Current round of in-depth testing began on November 7, 2018.
• Release of Spring and Summer 2018 effort reports will be delayed until testing is completed.
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