Changes to Payment of GRA’s

New Regulations
Effective July 1, 2005, all Graduate Research Assistants (GRA’s) will receive support payments for their services via Accounts Payable (AP) instead of Payroll as in the past. This change—recommended by Human Resources (HR), Corporate Financial Services (CFS), and Sponsored Projects Administration (SPA) and approved by the Provost—is necessary to ensure that a clear distinction is made between GRA’s and OHSU employees as it relates to new Fair Labor Standards Act (FLSA) regulations effective August 2004.

In response to inquiries by the College and University Professional Organization for Human Resources the Department of Labor has clarified that Graduate Research Assistants are not employees and should be treated as students.

New OGA Expenditure Type and GL Object Code
A new Oracle Grants Accounting (OGA) expenditure type and a new General Ledger (GL) object code have been created to account for GRA’s who are supported by grants. A focus group, consisting of representatives from HR, CFS, SPA, SOM/Graduate Studies Program, as well as various other OHSU departments has been assembled to work through issues that arise from this change.
Changes for GRA’s
GRA’s will receive payments monthly, five (5) business days prior to the end of each month, rather than biweekly. Payments will be issued by AP via check and will be mailed to GRA home addresses. At this time, direct deposit of these payments is not available; however, there are plans to implement a direct deposit by August 2005.

Issues Related to GRA Payment

Submission Deadlines – forms for new GRA payment recipients or changes for existing recipients are due in AP by the 15th of the month. If these payments are funded by a grant account, please allow adequate time for your SPA Analyst to review and approve the form before submission to AP for processing.

Expired or Overspent Accounts – GRA payments from sponsored accounts that are expired or overspent cannot be processed through AP. These transactions will be rejected automatically by the Oracle AP module. AP will notify SPA of any transactions that are about to be rejected; however, the window of opportunity to address these issues is very small (typically “same day” or 1-2 days at most). It is imperative that AP, SPA, and all department representatives are diligent in their efforts to correct any funding problems so as to avoid depriving a GRA of support for that month.

Effort Reporting – GRA support payments are subject to reporting requirements cited in Office of Management and Budget (OMB) Circular A-21 (section J.10, “Compensation for Personal Services”). As OHSU’s effort database is currently populated using data collected from the Oracle payroll module, some modification to the current system will be necessary to collect the required information and populate the effort certification statements. SPA anticipates that these changes will be in place prior to the end of the next effort reporting period (Jul-Dec 2005).

Summary Document
A thorough summary document, complete with a timeline, links to related forms and policies, as well as a list of Frequently Asked Questions is available on the SPA website: http://www.ohsu.edu/research/rda/spa/docs/gramop.pdf

Questions about these changes may be addressed to the following individuals:
- Dolores Morelli – Compensation Manager – OHSU Human Resources, morellid@ohsu.edu, (503) 494-8840
- Jan Klinefelter – Senior Manager, Corporate Disbursements – OHSU Corporate Financial Services, klinefel@ohsu.edu, (503) 494-7356
- Chris Cunningham – Associate Dean for Graduate Studies – OHSU School of Medicine, cunningh@ohsu.edu, (503) 494-2018
- Elizabeth Willis – Analyst Supervisor – OHSU Sponsored Projects Administration, willise@ohsu.edu, (503) 494-0354

Additional information can also be obtained on the SOM Graduate Studies Website http://www.ohsu.edu/som/graduate/council/index.shtml or by emailing somgrad@ohsu.edu.

For more information on RDA, please visit the website at http://www.ohsu.edu/re-search/rda/
F&A Rate Updates

The office of Dan Dorsa, Ph.D., OHSU’s Vice President for Research, recently distributed a three-page memo to Vice Presidents, Deans, Directors, Department Heads, Department Administrators and Principal Investigators. In this memo, Dr. Dorsa outlines OHSU’s new Facilities & Administrative (F&A) Rate Agreement (dated 2/18/05) with federal sponsoring agencies and describes the university’s institutional strategies for implementing the new F&A Rates.

This memo identifies key elements in the implementation of the new F&A Rate Agreement as follows:

• Effective immediately, all new and competing renewal grant applications and contract proposal budgets must include the new F&A rates.
• Research Grants and Contracts (RGC) will contact the sponsors of new or competing renewal grants awarded with old F&A rates on or after February 18th to request the Award Notices be revised to reflect the new F&A rates.
• Budgeting for F&A costs in an application or proposal will require dividing up the F&A cost base, the Modified Total Direct Costs (MTDC), for each budget period in proportion to the number of months that fall into each fiscal year, then applying the rate that is applicable for those months. (Note that Research Grants and Contracts (RGC) will provide an online tool to help with this calculation. Until the automated tool is complete, a more thorough explanation of this process is on the RGC website at http://www.ohsu.edu/research/rgc/docs/newfa.doc or contact their office for additional help.)
• Effective July 1, 2005, F&A adjustments will not be processed for situations of spending variances from budgeted cost categories; direct and F&A. (In response to PI concerns since the initial circulation of this memo, Dr. Dorsa has clarified that the prohibition of F&A adjustments will only be applied to awards starting after July 1, 2005.)
• The F&A rate applied to no-cost extensions will be the F&A rate listed in the Rate Agreement in place at the time of the initial award.
• If carryover funds become part of a new competitive segment, the F&A rate applied to those carryover funds will be the F&A rate listed in the Rate Agreement in place at the time of the new competitive segment.

The full text of Dr. Dorsa’s memo is available on the Corporate Financial Services (CFS) website: http://ozone.ohsu.edu/financial/indirectcost/MemofromDorsare.pdf

CFS continues to make new and improved resources available on the F&A section of their website: http://ozone.ohsu.edu/financial/indirectcost/index.shtml

CFS has also recently added a page for Frequently Asked Questions about rate implementation: http://ozone.ohsu.edu/financial/indirectcost/FAQforRateImplementation.pdf This document will continue to be expanded as CFS receives more questions.

SPA Summary Reports Error

Due to a data error, the March 2005 SPA Summary Reports included several days’ worth of expenditures for April. Depending on the expenditure activity for specific projects, figures on the March reports were most likely higher than they should have been. This in turn would have affected the deficit figures. This was reconciled for the April reports, and the correct March deficit figures will appear in the “Mar-05 Deficit Balance” column.

If you require specific data to fulfill certain business needs as a result of the above error, please contact Jason Lycette, SPA Information Specialist, at 503-494-4862 or lycettja@ohsu.edu.
New F&A Calculating Tool for Budgeting

Due to the changing Facilities & Administration (F&A) rates over the next several years, and the complexity during the budget process of calculating the appropriate F&A amounts using multiple rates, RGC has developed a new tool for calculating F&A. Called FACT (F&A Calculating Tool), it captures the project’s direct cost information as well as those costs that are not eligible for F&A. Based upon the data entered by the user, the amount of F&A costs are automatically calculated for each project year. It can only be used for those projects using the MTDC F&A Base.

After some final improvements, the tool is expected to be available on the RGC website by June 10, 2005. Look for it on the RGC website: http://www.ohsu.edu/research/rda/rgc/budgetdev.shtml. Also, to ensure that you are always using the most up-to-date version of FACT, please remember to access and regularly download the tool from the website, rather than saving it to your own drive. Instructions for using the FACT will also be provided on the website.

If you have any questions about FACT, please contact Carolyn Foster, RGC Operations Manager, at 503-494-5438 or fosterc@ohsu.edu.

New RGC Operations Manager

Carolyn Foster has recently joined OHSU as the new Operations Manager in Research Grants & Contracts (RGC). Her previous position was with Huron Consulting Group as a project manager, where she worked with universities, hospitals, and medical centers to implement integrated grants management and financial systems while streamlining business processes. Carolyn will be working to update and consolidate the various database systems within RGC, document business procedures, coordinate the pre-award implementation of electronic research administration, and manage the office administration and award setup activities.

Reminder About PHS 398 and PHS 2590 Face Pages

Please be sure that face pages to the PHS 398 and PHS 2590 are completely filled out before the applications are submitted to RGC. Additionally, please share this reminder with both your Principal Investigators (PI’s) and any others that regularly submit these forms. There are partially completed examples of each form on the RGC website:

- PHS 398: http://www.ohsu.edu/research/rda/rgc/docs/398.doc
- PHS 2590: http://www.ohsu.edu/research/rda/rgc/docs/2590-fp1.doc

For more Research Grants & Contracts (RGC) information, please call 503-494-7784, or visit the RGC website: http://www.ohsu.edu/research/rda/rgc/

Miss the last SPIN Meeting?

Presentations and handouts from previous meetings are available on our website: http://www.ohsu.edu/research/rda/spa/spin.shtml
OGA Training

Those involved in sponsored projects management are invited to attend Oracle Grants Accounting (OGA) training classes. Classes explain available OGA Reports and demonstrate how to navigate through the OGA system to find extensive award and project information.

Contact Juris Solovjovs at 503.494.9806 or email solovjovs@ohsu.edu to register.

<table>
<thead>
<tr>
<th>OGA Training Classes</th>
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<tr>
<td>Thursday, June 23, 2005, 1:00-4:00, BICC 121</td>
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<tr>
<td>Thursday, July 14, 1:00-4:00, BICC 122</td>
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<tr>
<td>Tuesday, August 16, 1:00-4:00, BICC 122</td>
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</tbody>
</table>

Oracle Drop-In Sessions

Oracle Drop-In Sessions are an opportunity for end users who have already been trained in Oracle to get one-on-one help in the system. Several Oracle Trainers will be present at each of these sessions to answer any specific OGA questions or to provide help designing your reports.

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<tr>
<th>Oracle Drop-In Sessions</th>
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<tr>
<td>*Wednesday, June 29, 1:00-4:30, BICC 121</td>
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<tr>
<td>*Wednesday, July 13, 1:00-4:30, BICC 121</td>
</tr>
</tbody>
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*OHSU Foundation staff will be available from 1:00-3:00pm.

To learn the latest about Oracle at OHSU, visit the Administrative Information Systems (AIS) website: http://ozone.ohsu.edu/ais/index.shtml

Please plan to attend the next Sponsored Projects Information Network (SPIN) Meeting:
Thursday, June 16, 2005
9:30am - 10:30am
UHS 8B-60
Summer 2005 PEP Classes

Sponsored Projects Administration (SPA) is pleased to invite pre-registration for the next two courses in the continuing Spring 2005 Post-award Education Program (PEP) series. Offered twice annually, the series of PEP courses focuses on the fundamentals of post-award sponsored projects management.

**Closeouts**  
*Tuesday, June 7, 2005*  
*2:00 pm – 4:00 pm*  
*Medical Research Bldg, R310*  
*(pre-registration required)*

**Clinical Trials**  
*Tuesday, June 14, 2005*  
*9:30 am - 11:30 am*  
*SON 358*  
*(pre-registration required)*

**Effort Reporting Seminar & Workshop**  
*Wednesday, July 20, 2005*  
*2:00 pm – 4:00 pm*  
*UHS 8B-60*  
*(pre-registration recommended)*

The PEP curriculum includes regularly offered courses on key sponsored project management themes. Enrollment in these courses is limited to 25 and pre-registration is required.

To register, please contact SPA Education at spaedu@ohsu.edu or 503-494-9063. Please remember to specify which course or courses you would like to attend.

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NCURA Video Workshop

Please plan to attend the next in the 2005 series of video workshops offered by The National Council of University Research Administrators (NCURA). “Principles of R&D Contracting,” broadcast live via satellite, presents a unique opportunity for in-depth review of research and development contracting.

**NCURA**  
“**Principles of R&D Contracting**”  
*Tuesday, June 14, 2005*  
*8:30 am - 12:30 pm*  
*Cenral Campus:*  
Son 144 (Founder’s Auditorium)  
*West Campus:*  
Malinow Conf Room (ONPRC)

NCURA advertises the workshop as follows: “This videoconference will serve as a training opportunity for research administrators in central and department levels who are assigned the tasks of identifying contracting opportunities, submitting contract business proposals, and negotiating and managing federal contracts. In addition, the conference will seek to address faculty issues. Adapted from annual meeting workshops held on this topic, items to be discussed will be: reading and interpreting RFP’s (requests for proposals), preparation of contract budgets, and identifying the regulatory sources of information to assist research administrators manage federal contracts, e.g. Federal Acquisition Regulations; Confidentiality, Publication Rights.”

Presenters include Kathleen Irwin, Senior University Legal Counsel, University of Wisconsin – Madison; Randy Draper, Director of the Office of Contracts and Grants, University of Colorado at Boulder; David Mayo, Associate Director, Sponsored Research, California Institute of Technology; and Bo Bogdanski, Senior Research Administrator, Sponsored Programs, Colorado State University.

Visit the NCURA website: [http://www.ncura.edu/conferences/fundamentals/](http://www.ncura.edu/conferences/fundamentals/)