Office of Sponsored Programs

Town Hall

Thursday, April 27, 2023
1:00 – 2:00 PM

Presented by:
David Paul | Assistant Vice Chancellor for Research

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
Housekeeping Items

• Meeting recorded (no participant video)
• Presentation available on OSP webpage after the event
• Ask questions in “Chat” – answered in chat or during live Q&A or after event, included in slides on webpage.
• Email OSPCommunications@unc.edu after with any other Town Hall questions.
Agenda

- Updates on Payments to Study Subjects
- Data Management & Sharing Plans
- RAM Reports: New Features
- New Intent to Fund Option in RAMSeS
- New/Upcoming Fringe Benefit Rates
- F&A Proposal, Space Study, Single Audit
- Carolina RAPiDs Update
- Research Core Updates
- 2023 Symposium
- Q&A – Time Permitting
Payments to Study Subjects
Important Dates for BoA Closure

**Wednesday, May 31**
- Last day in BoA system to issue remaining cards to study subjects.
- Departments should shred inventory of unloaded prepaid cards.

**Friday, June 23**
- Last day to submit all OSP cash advance reconciliation journals

**Friday, June 30 – Fiscal Year End**
- All advance reconciliations must be fully completed and posted in ConnectCarolina.
Options for Replacing Prepaid Program

• UNC is working swiftly to implement a new prepaid card program. Some vendors currently in consideration are: **Greenphire, National Gift Cards, and Tango Cards.**

• A temporary option for department/research team members to **purchase gift cards via special/designated University P-Cards** is also underway. Application process is forthcoming in the next few weeks.
Existing Methods to Pay Study Subjects

Cash Advance

• Advances funded on sponsored projects, follow OSP Operating Standard and Procedure 500.14 and use the forms located on the OSP Forms and Tools webpage.

Outside Party Individual (OPI) Voucher Payments

• Follow Accounts Payable process for domestic vendor payments via voucher and include OPI Certification form.
NEW – OVCR Gift Cards

Beginning 4/24/2023, the OVCR in collaboration with OSP will offer a process to procure gift cards for study subject incentives when the following apply:

- procurement via cash advance is not expedient, voucher for Outside Party Individual (OPI) is not viable, and department does not have a special, dedicated University P-Card approved for this purpose (formal process coming soon).
- time-limited process through 6/30/2023 only.
- All requirements of OSP's cash advance request & reconciliation apply to this OVCR gift card process.
OVCR Gift Card Request Process

- Complete the [Online OVCR Submission for Gift Cards for Study Incentives](#).
- Request only the amount of gift cards necessary through 6/30/2023.
- **Average processing time is 5 business days**, from request submission to availability of the gift cards for pick-up.
- Departments must **reconcile the advance within 60 days from receipt of cards** and move the advance from account 559540 to the appropriate expense.
- Reconciliation of these gift cards will use the [OSP Cash Advance Reconciliation form](#) and follow [OSP Operating Standard 500.14, Pro. 1 - Reconciling Cash Advances](#) for domestic advances.
- Any questions on this new process can be emailed to [OCT@unc.edu](mailto:OCT@unc.edu).
Future of Data Management at UNC

• To help coordinate UNC’s efforts on research data management and sharing (DMS) and to ensure compliance with sponsor requirements, the University is launching a new Research Data Management Core (RDMC) in the Odum Research Institute.

• A new RAMSeS IPF screen for collecting information on DMS will also be released in conjunction with the launch of the RDMC.

• New rates for budgeting data management are also forthcoming.

• Anticipated Implementation October 2023

• Formal communication from VCR’s Office with more details coming soon
RAM Reports: New Features
OSP and ITS continuously work to improve the functionality and features of RAM Reports.

Most recent updates include:
• **My Resources** enhancements with more to come
• **Improved Excel downloads**
• Please offer [feedback on RAM Reports](#) via the online form
Users have access to a personalized reporting feature called "My Resources" that displays project information based on pre-mapped roles in RAMSeS.

Filters By:
- Awards/Projects
- Personnel Totals
- Personnel Monthly
## Improved Downloads

- **Title**: Award Summary
- **Report Date**: 3/29/23
- **Fiscal Year**: 2023
- **Accounting Period**: 9
- **Award**: A12-3456-001
- **Award Title**: Sample Research Title
- **Project ID**: 5055555
- **PI Name**: Doe, Jane
- **Sponsor**: 55555 - Sample Sponsor Foundation
- **Prime Sponsor**: 
- **Sponsor Award #**: 123456789
- **Award Dates**: 08/01/2020 - 09/30/2022
- **Award Purpose**: Organized Research (110) (OR)
- **Department**: 621100 - Office of Sponsored Programs

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New Intent to Fund in RAMSeS
Intent to Fund Proposal Status

• When a sponsor has documented they expect to fund a project, a new "Intent to Fund" proposal status is available for the OSP Sponsored Projects Specialist (SPS) to trigger.

• Automated RAMSeS emails will be sent to the same recipients as "Award Received" process.

• COI and other compliance offices will also receive the intent to fund notification.

• If departments receive an intent to fund notice, forward it to SponsoredPrograms@unc.edu.
To represent actual fringe expenses, two new categories with corresponding fringe rates are being created:

- Faculty TSERS
- Faculty ORP

Departments will need to indicate in the internal budget if faculty have elected TSERS or ORP retirement plans. SPO will also update their budget template to correspond with the criteria.

New rates to be released by July 1, 2023.
F&A Proposal, Space Study & Single Audit
Cost Analysis & Compliance Updates

F&A Proposal
• FY2023 is the base year and we anticipate developing and submitting the proposal by March 2024

Space Study
• To begin this summer with more information to come. Campus can begin updating SPOTS survey plans.

Single Audit
• FY2023 audit underway soon
• Please respond promptly to OSP with any data/justification requests.
Carolina RAPiDS
Carolina RAPiDS: Relaunch Update

- Canvas platform and Carolina Talent integration.
- Stay tuned for a communication with relaunch dates and access information.
Research Core Updates
Research Core Development Updates

Financial Reports
• Tableau reports in final development to help manage research cores and improve sustainability.
• Available soon to departments, core directors and leadership.

SmartSheet
• Leveraging SmartSheets for rate development process.
• Leads to improved transparency, communication & reporting.

*Visit Research Core Development website for current updates.
Save the Date

2023 Symposium Dates Announced
• Back at the Friday Center!
• August 24: in-person and virtual (hybrid)
• August 25: virtual only

*Registration opens in early July*

Speakers, topics, and schedules releasing soon. Email OSPSymposium@unc.edu with questions and visit the Symposium Website.
Q: The new temporary procurement process can only be used if "procurement via cash advance is not expedient." What timeframe would be considered not expedient?

A: This depends on the individual situation, but generally if cards are needed in less than 2 weeks, the short-term VCR gift card procurement is appropriate.

Q: What is the timeline for TANGO cards to be available to investigators/studies?

A: We will have a better update once we start the development work with TANGO within the next few weeks. A communication will be sent once we have more information.

Q: Can other departments and divisions utilize SmartSheet?

A: For research service center (RSC) rate reviews, campus departments will have access to the information within SmartSheet. For activities unrelated to RSC rate reviews, there isn’t an enterprise license for SmartSheet, so individual departments would need to explore obtaining their own licenses.
Q: Do we have to check retirement plans for faculty and staff due to the new ORP option?
A: The new fringe categories and rates only apply to faculty and not staff.

Q: We have a large award with faculty from different departments and schools. It will be time consuming to either look up/email each of these faculty members to determine their retirement plan selection. What is the best way to navigate this situation?
A: We understand the initial outlay of effort on departments for this change, and plan to provide a longer transition period before budgets are required to detail [for faculty only] their TSERS or ORP selection. We encourage departments to start planning and updating their budget spreadsheets to include this detail when they are working with their faculty on proposals. After the information is obtained, it should not need to be updated. More information on the new rates and implementation for proposal budgeting will be forthcoming. If you have any additional questions or feedback, please reach out to OSPCommunications@unc.edu.