

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

The background of the slide is a composite image. The top portion shows a dense canopy of green trees against a bright sky. The bottom portion shows a classical building with a portico supported by several white columns. A large, semi-transparent blue banner with a white border is overlaid across the center of the image, containing the title text.

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

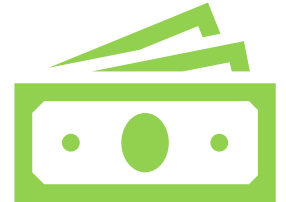
- UNC is working swiftly to implement a new prepaid card program. Some vendors currently in consideration are: **Greenphire, National Gift Cards, and Tango Cards.**
- A temporary option for department/research team members to **purchase gift cards via special/designated University P-Cards** is also underway. 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.

Data Management & Sharing

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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

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RAM Reports: New Features

RAM Reports Updates

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



My Resources

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RAM

Project AR Monthly Reports

My Resources

My Projects

Projects

Personnel Totals

Personnel Monthly

Awards and Projects associated with me

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

Award or project summary
 headers on each RAM
 Reports page included for
 all downloads

ROW_DESCRIPTION	FA Enabled	BUDGET	EXPENSE_MTC	EXPENSE_YTD	EXPENSE	CURRENT_BAL	ENCUMBRANC	PROJECTED_EI	PROJECTED_BALANCE
Salaries	No	76287.34	0	0	52530.45	23756.89	0	0	23756.89
Fringe Benefits	No	3468.9	0	0	7690.13	-4221.23	0	0	-4221.23
Repairs & Maintenance	No	0	0	0	159	-159	0	0	-159
Travel Domestic	No	0	0	0	2259	-2259	0	0	-2259
Travel Foreign	No	317.48	0	0	5309.03	-4991.55	0	0	-4991.55
Freight & Express	No	283.73	0	0	981.18	-697.45	0	0	-697.45
Insurance	No	0	0	0	19.88	-19.88	0	0	-19.88
Supplies	No	3180.55	0	0	8593.4	-5412.85	0	0	-5412.85
Trainee Tuition & Fees	No	0	0	0	2085.75	-2085.75	0	0	-2085.75
Miscellaneous Expense	No	0	0	0	1614.57	-1614.57	0	0	-1614.57
Lapsed Funds	No	-22.66	0	0	0	-22.66	0	0	-22.66
Cost Share	No	0	0	0	0	0	0	0	0



The background of the slide features a photograph of a brick clock tower with a white clock face, partially obscured by a large blue semi-transparent banner. The tower is surrounded by trees with vibrant autumn foliage in shades of orange, red, and brown. The sky above is blue with scattered white and grey clouds.

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.



**Coming
Soon**

The background of the slide is a composite image. The top half shows a dense canopy of green trees against a bright sky. The bottom half shows a classical building with several white columns and a red brick facade. A large, semi-transparent blue banner with a white border is overlaid across the middle of the image.

New Fringe Benefits Rates

New Fringe Categories & Rates

- 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

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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

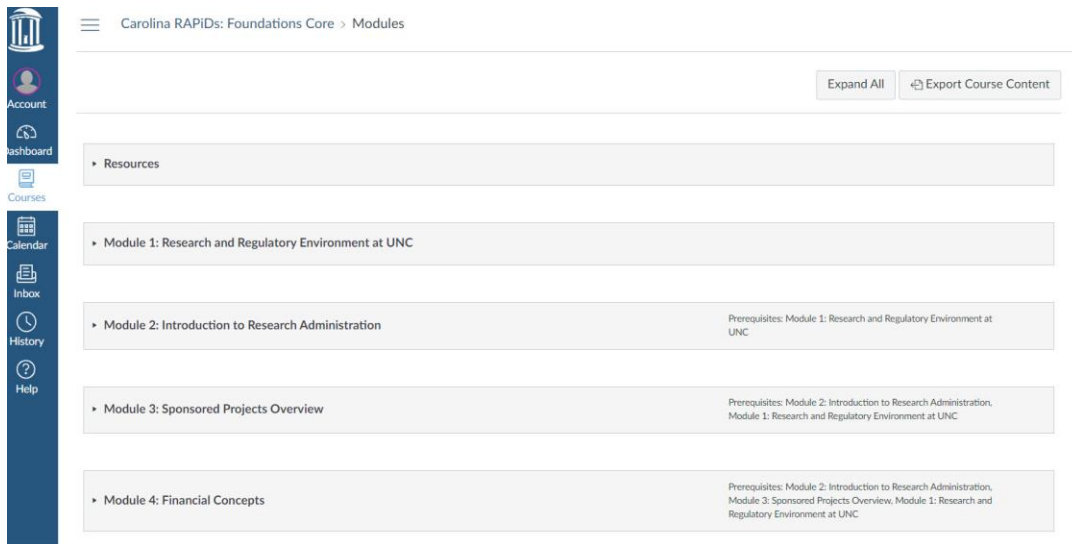
- FY2023 audit underway soon
- Please respond promptly to OSP with any data/justification requests.



Carolina RAPIDS



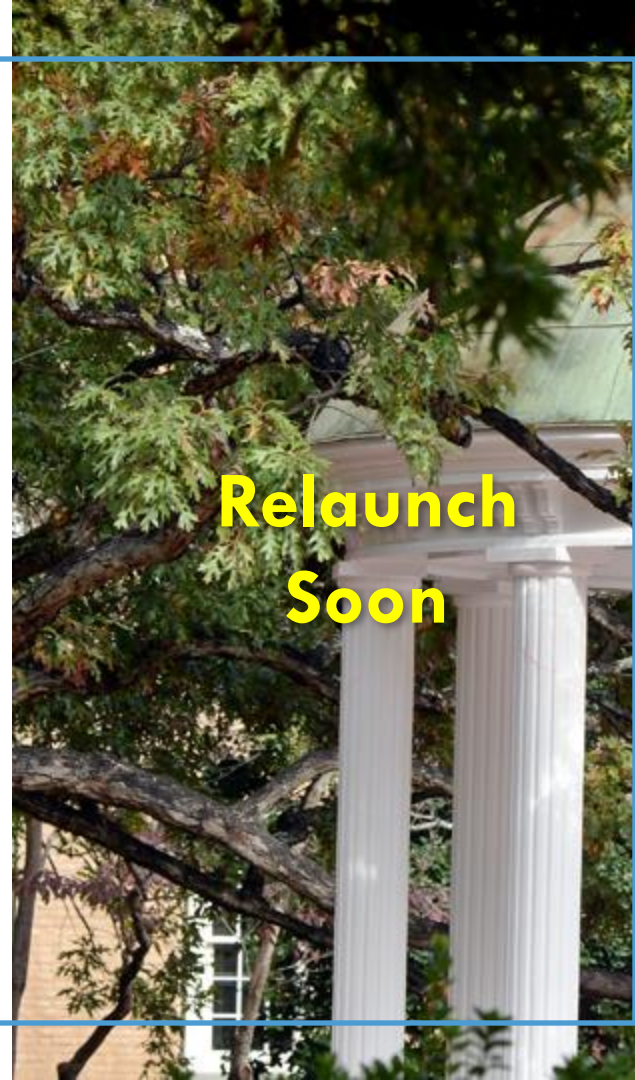
Carolina RAPiDS: Relaunch Update



The screenshot displays the Carolina RAPiDS course interface. On the left is a dark blue sidebar with icons for Account, Dashboard, Courses, Calendar, Inbox, History, and Help. The main content area shows the course title 'Carolina RAPiDS: Foundations Core > Modules' and two buttons: 'Expand All' and 'Export Course Content'. Below this are four module cards:

- Resources
- Module 1: Research and Regulatory Environment at UNC
- Module 2: Introduction to Research Administration (Prerequisites: Module 1: Research and Regulatory Environment at UNC)
- Module 3: Sponsored Projects Overview (Prerequisites: Module 2: Introduction to Research Administration, Module 1: Research and Regulatory Environment at UNC)
- Module 4: Financial Concepts (Prerequisites: Module 2: Introduction to Research Administration, Module 3: Sponsored Projects Overview, Module 1: Research and Regulatory Environment at UNC)

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



Relaunch
Soon

The background features a photograph of a clock tower at night, with its illuminated clock faces and a dark conical roof visible against a twilight sky. Silhouettes of bare tree branches are present in the upper left and lower left corners. A solid blue horizontal band spans the middle of the image, containing the title text.

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.





2023 Symposium



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.





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