



UNIVERSITY *of* MARYLAND

SPA/SPAC UPDATE MEETING

May 19, 2016

2:30 – 4 pm

Pharmacy Hall: N203 Lecture Hall

TODAY'S AGENDA

- Financial Services Update
 - Revisions to the Study Participant Payments Procedure
 - Year End Updates
- Financial Systems Update
- SPA/SPAC Joint Updates
 - Reorganizations/Staffing Update
 - Recent State Agency Issues
 - Recent VA IPA Trainings and Enforcement
- SPA Updates
 - Research Matters
 - eSuRF
 - Kualu Coeus
 - Reminders
- SPAC Updates
 - Fringe Benefit Rate Update
 - Fair Labor Standards Act
 - Fixed EFP Changes
 - Reminders

Study Participant Payment Procedures

- Updated to incorporate recent changes
 - Requirement to show 4862 activity on projects where cash or gift cards were previously expensed
 - Physical safeguarding of cash or giftcards
 - Lockboxes or safes with combination locks that can be changed when personnel changes
 - Limiting access to cash/GCs to 1 person but have multiple people with cash/GCs
 - Availability of Gift Card System (GCS)

Study Participant Payment Procedures

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Financial Services

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Welcome to Financial Services

We provide quality service and informed leadership to the campus in areas requiring our financial expertise.

QUICK LINKS

[Sales and Use Tax Exemption Certificate](#) 

[W-9 Form](#) 

[Rates](#)

Sections

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FY16 Year End deadlines

- FY16 PUR01 requisitions will not be approved after tomorrow (5/20)- they will be recycled with instructions to submit as a FY17 requisition
- FY16 PUR02 requisitions will not be approved after Wednesday, June 8th
- If you have an emergency FY16 procurement you must contact Joe Evans and he will instruct Fin Services as to whether we can approve it



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eUMB Financials Replacement Project

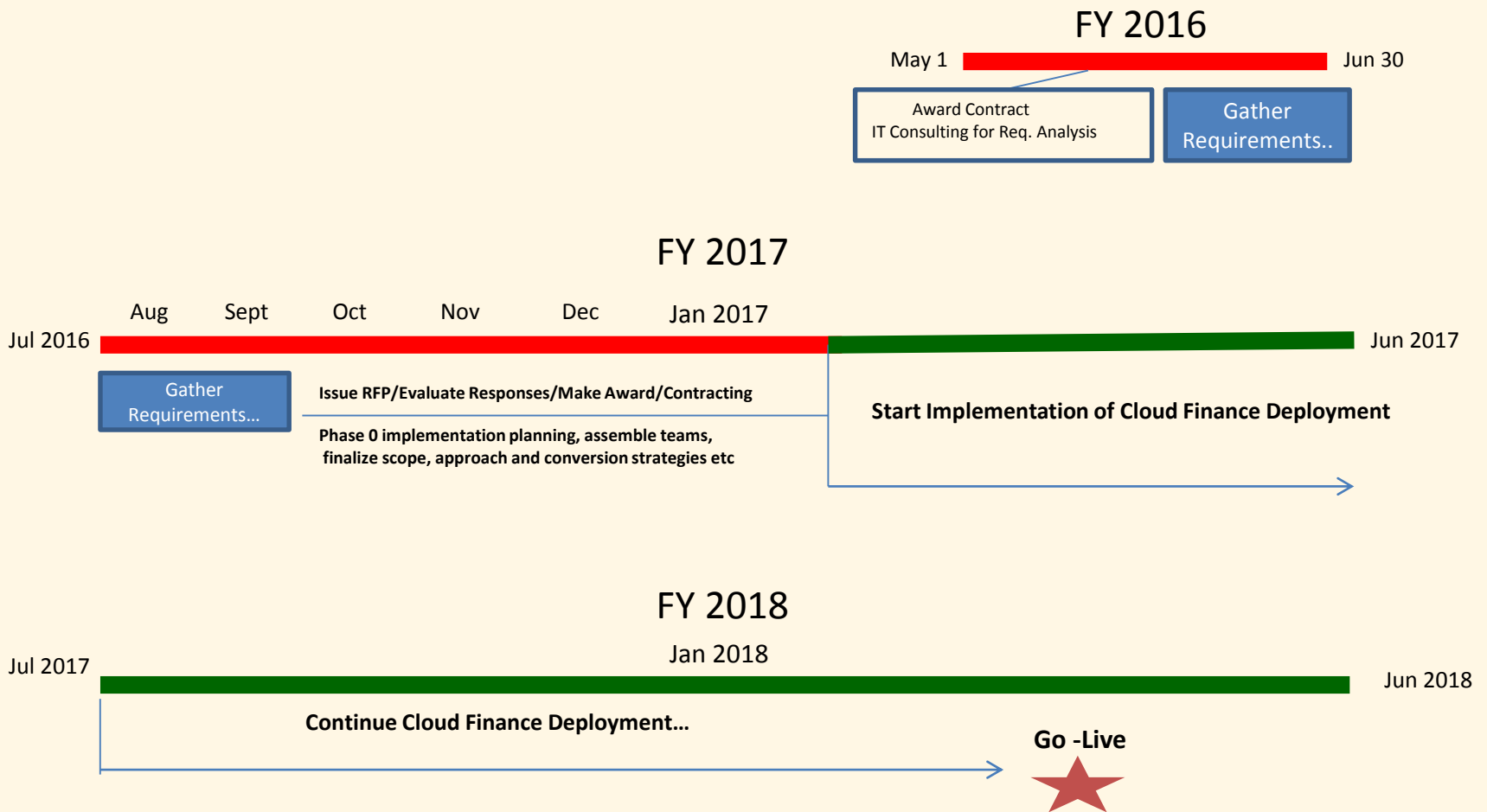
Why ?

- eUMB Financials/RAVEN – live since 3/23/06
- Upgraded/Modified/ Enhanced/Customized the System to support our ever evolving needs – cost sharing, new FB model, Project Year to Date Salary Encumbrance to name a few
- Times are changing...
 - Market data indicates a move to new computing models
 - Mobile workforce pressures
 - Cost/Budget constraints
 - The need for better, more timely information

Why?

- The four too's – Big, Slow, Complex, Expensive
- All on-premise ERP providers are de-investing in product development
- The rent vs. buy movement is the new model
- Cloud computing is now 1st choice for most institutions
- Costs – capital to operating

Project Target Timeline





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SPA/SPAC Updates 2nd Quarter 2016

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SPA Personnel

- 2 open positions – Manager and Sr Administrator. Currently interviewing, in place by 7/1/2016
- Danielle Brown is currently managing both Team White and Yellow.

SPAC New Staff

- Esther Ndiangui, Sr. Contracts Accountant
- Andrew Rice, FA Team White
- Larcell Pannell, FA Team Yellow
- Nur Syeda - Intern

SPA/SPAC School/department assignment change

- As of July 1, 2016 – SPA and SPAC will be making changes to the School/Department Assignments.
- Team Yellow will be eliminated

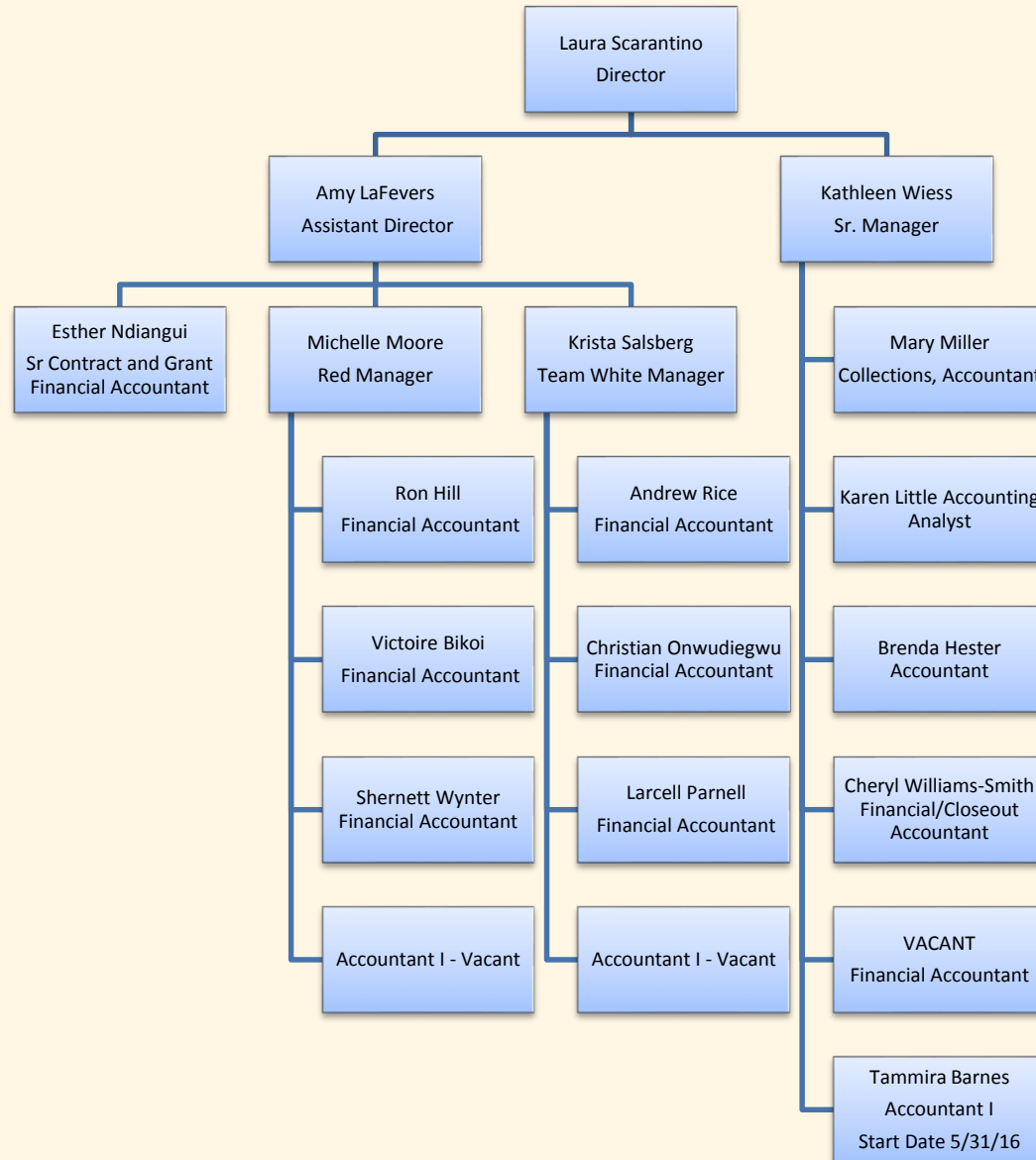
New Assignments

Sponsored Programs Administration - Team Assignments Effective 07/01/2016

Red	White	Black
School of Medicine: Anatomy/Neurobiology Biomedical Eng & Tech Comp Med (Vet Resource) Ctr for Integrative Med Dermatology Emergency Medicine Family Medicine IGS IHV Neurology OB/GYN Physical Therapy Psychiatry Radiation Oncology Surgery Ctr/Biomolecular Ctr/Health Policy & Health Serv. Diagnostic Radiology Epidemiology Neurosurgery Orthopaedics	School of Medicine Anesthesiology Biochem & Mol Biology Ctr/Stem Cell Biology CVD CVID Dean's Office IMET Microbiology Ophthalmology Otorhinolaryngology Pathology Pediatrics Pharmacology Physiology Pre-clinical Res Lab Program in Trauma STAR Program of Oncology Medicine	Proposal Development Cardiology (Rajagopalan) Center/Health Policy Dermatology Diagnostic Radiology Ophthalmology Otorhinolaryngology SBTDC
School of Law School of Social Work School of Dentistry Campus Administration	School of Nursing School of Pharmacy HS/HSL	
Sr. Grants Administrator Grants Administrator Analyst Analyst	Sr. Grants Administrator Grants Administrator Analyst Analyst	Dinnise Felder Shelley Tiemann

SPAC ORGANIZATION CHART

Effective 07/01/2016



State Agency Issues

- Potential Legislative Audit Finding
 - Concern that State Agencies are using Interagency Agreements to circumvent procurement regulations
 - Make sure we are actively participating in vendor agreements for services and subcontracts

State Agency Issues – DBM Approval

- Effective 7/1/2016
- All new state agency agreements will need approval from DBM
 - In FY 2016, it was just awards over \$500,000
- All on-going agreements over \$500,000 will have to be reviewed every year by DBM



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Update on VA IPAs & Contracts

Presented by: Bryan Soronson MPA,
CRA, FACMPE

VA IPA Training Highlights

- IPA Training was conducted to the community on 4/4/16 from Pamela Zgorski, VA Maryland Health Care System HR Contact
 - PowerPoint slides and information sent to those in attendance, communications continue to follow
 - Major Change: no post-doctoral fellows are permitted on IPAs
 - Those currently in process are being denied
 - Those with fully executed IPAs are to terminate early
- A few VA IPA training highlights:
 - Must enter all dates of previous IPA's (use separate page if necessary)
 - Salary/Rate in box 14 (state salary), box 23 (rate of pay), & box 26 base salary (federal agency obligations) must match
 - Box 21 (Reason for Mobility Assignment) must provide specific explanations answering all questions

VA IPA Training Highlights continue...

- Box 22 (Position Description):
 - **list** major duties and responsibilities to be performed
 - administrative and support duties should not be listed
 - **New:** the following must be included in all IPA's for the employee:
 - *Tour of duty* (days and hours employee will work)
 - *Location of work* (building, department, and room)
 - *"Employee is responsible for hours of duty and for notification to supervisor of any inability to be present for work."*

VA IPA Training Highlights continue....

- Fiscal obligations, box 26: follow specific cost breakdown, see below example:

Year 1 Fraction (Assign. Months/12): .83 (10 months)

Base Salary: \$23,000

FTEE (60% Effort): .60

Assignment Salary: \$16,000

Fringe Rate: 41.8%

Fringe Cost: \$6,688

Year 1 Total VA Obligation: \$22,688

VA IPA Lead Times & Suggestions

- According to Carol Roberts, Administrative Officer, Office of Research & Development (Research Service), Baltimore VA Medical Center, partially executed paperwork needed at VA Research Service at least **60 days** in advance of desired employee's start date;
 - VA HR (Perry Point) requires the paperwork in their office at least **30 days** prior to the employee's desired start date
- IPAs cannot start without the assigned employee's approved *Without Compensation Appointment (WOC)*

VA IPA Temporary Project Ids

- VA has stated that they will no longer be back dating IPAs
- Going forward, all VA IPA temporary project id requests will require the physical signature of the Dean's Office

IPA Suggestions

- Utilize VA direct hire mechanism for new employees who are slated for 100% on an IPA
- IPA off campus F&A rate is 7.8% for FY16+
 - UMB will start discussions about adding this to IPAs
 - VA Handbook states that overhead not allowable to be added for **VA** IPAs. Will they enforce this?

VA Contracts

- Two types of VA contracts recommended from Carol Roberts:
 - Personnel Services Contract
 - Consulting Services Contract
- Lead time for processing VA contracts is at least **90 days**
- Contracts will be submitted with our negotiated rate
 - 26% for off-campus awards

VA Contacts

- Pamela Zgorski, Program Specialist HRMS, VA Maryland Health Care System 410-642-2411 ext. 5201, pamela.Zgorski@va.gov.
- Carol Roberts, Administrative Officer, VA Research and Development, Baltimore VA Medical Center, 410-605-7000 ext. 6706, carol.roberts3@va.gov.



- **Questions?**



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SPA Updates

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Research Matters

- A new forum that will allow all UMB personnel to search for answers to their questions and/or receive an answer to a question that has never been asked before.

eSuRF

- eSuRF will be shutting down on June 1, 2016.
- Campus will be required to use the electronic Subaward Request Form.
- Scope of Work and Budgets will be required for all actions.
- Subaward Request form can be accessed at SPA's website under SPA forms.
- We are also now providing a Subaward Budget template form.

Kuali Coeus

- NIH Form Set D should be put into production this weekend (5/21/2016). Unless problems arise.
- Proposals that involve other Schools or Department personnel:
 - Provide View Access to the Administrator and Dean's office for the Key Person; or
 - Require routing of all Key Personnel; or
 - Require a new DRIF form to be used.

Reminders

- When routing proposals that have corporate sponsors, there are only four choices for activity type
 - Corporate Research
 - Corporate Clinical Trial
 - CME Corporate
 - Corporate Other Activities
- Please, please use the Team Emails when communicating with SPA, unless an action has been triaged and you know who the SPA person that is working on that action.
- You must use the Subrecipient Commitment Form if you have a subrecipient within your proposal. SPA staff have been given instructions to hold your proposal until the form is in KC.
- Getting your Proposals in early



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SPAC Updates 2nd Quarter 2016

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FY 17 Fringe Benefit Rates

	Apply to Accounts	FY16 Finalized	FY17+ Finalized	Fringe Account
Faculty	1011 – Faculty 9/10 Month	23.4%	26.4%	2790 - Fringe Rate Faculty
	1012 – Faculty 12 Month			
Staff	1013 – Exempt Staff	35.1%	40.9%	2791 - Fringe Rate Staff
	1014 - Non-exempt Staff			
Legislated Benefit	2071 – Faculty	8.4%	8.5%	2793 - Fringe Rate Legislated Benefit
	2072 - Exempt Staff (C1)			
	2073 – Non-exempt Staff (C1)			
	2074 - College Work Study (CWS) (Summer)			
	2075 - Student (other than CWS) (Summer)			
	2080 – Summer Salaries			
	2110 – Overtime			
	2120 – Shift Differential			
	2130 - On-call Pay			
Limited Benefit	1021 - Post Docs/Fellows	25.8%	26.1%	2792 – Fringe Rate Limited Benefit
	2090 - Contractual Employee (C2)			

Fair Labor Standards Act (FLSA)

- Long awaited new regulations published on Wednesday
- Takes effect on December 1, 2016
- Sets the overtime wage threshold at \$47,476 per year
- Graduate and undergraduate students who are engaged in research
 - Exempted from this new regulation because they are in an educational rather than an employment relationship
- Graduate students whose primary duty is teaching or serving as teaching assistants
 - Exempted under the teaching exemption

FLSA and Post Docs

- Post Docs were not exempted from the regulation
- New threshold is above the first three levels of the NIH NRSA post doc minimums
- NIH responded by saying that they were going to increase these minimums so that all were above the new threshold

Fixed EFP Changes

- Fixed EFPs are the Employee Funding Profiles in HRMS used when a retroactive pay is effective for pay periods in the prior fiscal year(s)
- More to be covered in the Commit Accounting Rollover meeting
 - June 2nd, 9:00 SON Rm. 140

Fixed EFP Changes

- Exempt Employees
 - No Fix EFPs
 - All prior year retropays will fall to the PCA
- Non Exempt and Hourly
 - Fixed EFPs for 4 pay periods of previous fiscal year to accommodate retropays resulting from timesheet completion
 - Retropays going back more than 4 pay periods will fall to PCA

SPAC Reminders

- March effort forms are due Tuesday, May 24th

Final Notes

- Presentation will be available on SPA and SPAC websites
- Thanks for joining us today!

Questions?

