08:32:34 From Perry King to Waiting Room Participants:

     Thanks for coming. We'll let you in momentarily.

08:36:13 From Elaina's OtterPilot to Everyone:

     Hi, I'm an AI assistant helping Elaina Lopez take notes for this meeting. Follow along the transcript here: https://otter.ai/u/vyMAI1tDMRJBhPLx-mayxjH7LIQ?utm_source=va_chat_link_1

     You'll also be able to see screenshots of key moments, add highlights, comments, or action items to anything being said, and get an automatic summary after the meeting.

08:37:00 From Roxanne N Vidales to Everyone:

     Reacted to "Hi, I'm an AI assist..." with ❤️

08:43:48 From Pamela Keach to Everyone:

     How does PI approval work with invoices going to accounting?

we need to follow up on this.

08:46:23 From Anujavarma Bhaskarakurup to Everyone:

     NIH's salary cap for 2024 has been increased to $221,900. OPM notice:

https://www.opm.gov/policy-data-oversight/pay-leave/salaries-wages/2024/executive-senior-level

08:47:26 From Leah Daugherty (she/her) to Everyone:

     Does that apply to no cost extension?

08:49:43 From Pamela Keach to Everyone:

     Got it, thanks.

08:53:58 From Maureen Ramirez to Everyone:

     I do have a question. On most federal awards, there is a rebudgeting allowance (if within sow). Why is it important to submit a new budget.

09:09:46 From Jennifer Q to Everyone:

     If we are receiving invoices from supply chain saying the PO is no longer viable (the old KFS PO) what do we do?

09:11:08 From Jennifer Gouine to Everyone:

     HHS awards are often disbursed year by year. Will the award be broken up into different projects, ie one per year?

09:11:45 From Nena Herrera to Everyone:

     Replying to "HHS awards are often..."

     Thank you for asking Jennifer. I have the same question.

09:12:07 From Maggie Gonzalez to Everyone:

     Reacted to "Thank you for asking..." with 👍

09:13:20 From Leah Daugherty (she/her) to Everyone:

     Reacted to "HHS awards are often..." with 👍

09:13:24 From Jennifer Gouine to Everyone:

     Reacted to "Thank you for asking..." with 👍

09:13:24 From Leah Daugherty (she/her) to Everyone:

     Reacted to "Thank you for asking..." with 👍

09:13:35 From Sheline to Everyone:

If we have awards that have expired but still had a balance... how did those transition in Oracle?

09:13:45 From Veronica Chavez to Everyone:

Can we submit a spreadsheet with those changes?

09:14:02 From Elizabeth Vang to Everyone:

James, how do you recommend we proceed with UCP (payroll) funding entries if our ticket hasn't been resolved by the monthly compute dates. Should we proceed with our entries using the incorrect chart segments (while we wait for our ticket to be resolved) or wait until CGA resolves the ticket and perform a SCT afterwards?

09:14:13 From Michael Webster (he/him) to Everyone:

Reacted to "James, how do you re..." with 👍

09:14:17 From Leah Brewster (she/her) to Everyone:

Reacted to "James, how do you re..." with 👍

09:14:32 From Jennifer Gouine to Everyone:

Reacted to "If we have awards th..." with 👍

09:14:37 From Lenora Bruce to Everyone:

For the HHS awards it will depend on the terms of the agreement. If it has auto cf then only 1 project is needed. If it doesn't have auto cf then a new project for each year. Also if it has auto cf and requires annual reporting...then new project for each year.

09:14:55 From Jenna Wills to Everyone:

Reacted to "James, how do you re..." with 👍

09:15:37 From Lenora Bruce to Everyone:

Replying to "Can we submit a spre..."

yes

09:15:50 From Veronica Chavez to Everyone:

Reacted to "yes" with 👍

09:16:33 From Michael Webster (he/him) to Everyone:

Can a PM always have a delegate, much like with Aggie Expense?

09:17:16 From Debbie Hoelscher to Everyone:

so to follow up on your answer to Veronica, we can submit a single ticket that has a spreadsheet attached with multiple items for the same request (eg accounts that didn't carry into AE that had end dates prior to January 2024)?

09:18:08 From Michael Webster (he/him) to Everyone:

I believe the answer re: PM delegate on sponsored projects is "no", but I hope that feature could be incorporated into AE.

09:18:17 From Mario A Reina-Guerra to Everyone:

Replying to "If we have awards th..."

They should have migrated to Oracle. If you are missing an award please log a SNOW ticket so we can identify the issue

09:18:18 From Maureen Ramirez to Everyone:

I have a lot of KBs. Is there a way to provide a homepage of available KBs Outline style with link?

09:18:22 From Lenora Bruce to Everyone:

Replying to "I believe the answer..."

here is the kba on delegating https://kb.ucdavis.edu/?id=10199

09:18:42 From Leah Daugherty (she/her) to Everyone:

Reacted to "I have a lot of KBs...." with 👍

09:18:47 From Sharon Kay Holgerson to Everyone:

Can additional info be added to a sub award invoice? On federal projects we add the statement (and with PI signature) that the project is on track per the SOW and aligns with the budget and expenses.

09:18:47 From Michael Webster (he/him) to Everyone:

Reacted to "Can additional info ..." with 👍

09:18:56 From Michael Webster (he/him) to Everyone:

Removed a 👍 reaction from "Can additional info ..."

09:19:00 From lynette to Everyone:

I am trying to make sure balances from KFS transferred correctly. Would I run the Department PL report or???

09:19:00 From Michael Webster (he/him) to Everyone:

Reacted to "I have a lot of KBs...." with 👍

09:19:02 From Tiffany Dong to Everyone:

Does the expectation of One Project - One Project only apply to Sponsored Projects? For Non-Sponsored Projects, we should encourage project managers to set up the projects utilizing multiple tasks under one project if neccessary for budget and expense managing?

09:19:25 From Lenora Bruce to Everyone:

Replying to "I have a lot of KBs...."

https://servicehub.ucdavis.edu/servicehub?id=ucd_index

09:19:39 From Debra Henn (she/her/hers) to Everyone:

KBA directory

https://servicehub.ucdavis.edu/servicehub?id=ucd_kb_view2&sys_id=22807f0b1bd879904690ea04604bcb4d&spa=1

09:19:43 From Leah Brewster (she/her) to Everyone:

Replying to "I believe the answer..."

Is there a similar option for PIs to create a delegate for invoice approvals?

09:20:15 From Leah Brewster (she/her) to Everyone:

Replying to "I believe the answer..."

I know they can individually delegate invoices as they come through, but is it possible to set up a longer term delegate if the PI is going to be out of service for a significant amount of time?

09:20:46 From Maggie Gonzalez to Everyone:

For subaward invoices that CGA used to process, where do we find the PO # to include?

09:21:21 From Lenora Bruce to Everyone:

Replying to "James, how do you re..."

please submit you ticket ASAP, we will be working on these today to get them completed for the monthly compute

09:21:28 From Jenna Wills to Everyone:

Reacted to "please submit you ti..." with 👍

09:22:04 From Sheline to Everyone:

Replying to "James, how do you re..."

Hi Lenora, was that answer for the expired accounts with balances?

09:22:24 From Sharon Kay Holgerson to Everyone:

Will the system notify the fiscal officer if the PI has not approved an invoice?

09:22:29 From Maureen Ramirez to Everyone:

Thank you Debra

09:22:33 From Lenora Bruce to Everyone:

Replying to "so to follow up on y..."

I would suggest 2 tickets, one for converted projects and one for projects that didn't convert.

09:22:39 From Rachael to Everyone:

Reacted to "James, how do you re…" with 👍

09:22:51 From Mario A Reina-Guerra to Everyone:

Replying to "so to follow up on y..."

We are trying to track patterns to the issues for root cause. If you can group the tickets for things like End Date changes, Changes to PMs.. A spreadsheet can be submitted with these requests per topic. For example one ticket for PM changes with a list.

09:23:18 From Cecilia N Martino to Everyone:

Are there any changes to the process of requesting advanced accounts?

09:23:26 From Jennifer Gouine to Everyone:

Reacted to "Will the system noti..." with 👍

09:23:35 From Farm Saetern to Everyone:

Replying to "For subaward invoice..."

KFS NPA# that migrated over to AE remains the same.

09:24:27 From Maggie Gonzalez to Everyone:

Replying to "For subaward invoice..."

Supply Chain rejected my invoice with the old PO, so I will check with them. Thanks.

09:26:06 From Debbie Hoelscher to Everyone:

Replying to "so to follow up on y..."

gotchya, so if I have a list of KFS accounts that didn't convert due to end date, that would be considered a "like" item and therefore could be requested on one ticket with a spreadsheet uploaded to reflect the "inventory" of accounts that need to transition into AE.

09:26:11 From Elizabeth Vang to Everyone:

Replying to "James, how do you re..."

@Lenora Bruce INC1817171-SOM-MINT SP - COA Mapping Inquiry was submitted back on 1-19-24 and is still outstanding. Will this be resolved today?

09:26:59 From Lenora Bruce to Everyone:

Replying to "James, how do you re..."

we will be reviewing and processing today

09:27:11 From Elizabeth Vang to Everyone:

Reacted to "we will be reviewing..." with 👍

09:27:53 From Alexis A to Everyone:

    Can we reach out to contract administrator directly or only through the ticket system?

09:28:03 From Michael Webster (he/him) to Everyone:

    Reacted to "Can we reach out to ..." with 👍

09:28:42 From Lenora Bruce to Everyone:

    Replying to "Can we reach out to ..."

    i would suggest the ticket system, unless you are working on a specific invoice/financial report

09:31:08 From Maureen Ramirez to Everyone:

    would associate indirects be auto?

09:31:20 From Lenora Bruce to Everyone:

    Replying to "would associate indi..."

    Yes

09:31:35 From Mario A Reina-Guerra to Everyone:

    Replying to "Can a PM always have..."

    Hi Michael - please look at this KBA https://kb.ucdavis.edu/?id=10199

09:32:36 From Katie Glattfelder (she/her) to Everyone:

    Replying to "Can we reach out to ..."

    @Lenora Bruce where is the form located?

09:32:45 From Michael Webster (he/him) to Everyone:

    Replying to "Can a PM always have..."

    Hi Mario, I believe that only talks about temporary changes in PM. How about a permanent delegate?

09:33:46 From Jennifer K Larr to Everyone:

    Replying to "Can we reach out to ..."

    Same question as Katie. Is there a link somewhere to the JV form we were just discussing?

09:34:35 From Lenora Bruce to Everyone:

    Replying to "Can we reach out to ..."

    Service now ticket -

https://servicehub.ucdavis.edu/servicehub?id=ucd_cat_item&sys_id=69aaee7a1bf7291094087bff034bcb48

09:35:21 From Mario A Reina-Guerra to Everyone:

    Replying to "Does the expectation..."

    One project one task does not apply to non-sponsored projects

09:35:55 From Hal Brunette to Everyone:

    Replying to "Can a PM always have..."

    For example, can a temporary delegate be set with an end date several years out?

09:36:09 From Jennifer Mongoven to Everyone:

    Replying to "Does the expectation..."

    Why is it limited for sponsored programs?

09:36:38 From Jennifer Gouine to Everyone:

    Reacted to "Why is it limited fo..." with 👍

09:37:28 From Lenora Bruce to Everyone:

Replying to "Can a PM always have..."
here is the kba for payroll transfers, which includes the transfer form -
https://kb.ucdavis.edu/?id=10224

09:40:16 From Debra Henn (she/her/hers) to Everyone:
Replying to "HHS awards are often..."
I think James answered this. If you still have questions, please raise your hand.

09:40:21 From Leah Brewster (she/her) to Everyone:
Replying to "Can a PM always have..."
@Mario A Reina-Guerra Is there a similar option for PIs to create a delegate for invoice approvals?
I know they can individually delegate invoices as they come through, but is it possible to set up a longer term delegate if the PI is going to be out of service for a significant amount of time and has given approval in advance?

09:40:58 From Kevin Waterson to Everyone:
Is the purpose code tied to the award, or the project? For example, if I were to pay a student stipend via banner on a PPM chart string that has purpose code 45, as opposed to 78, would that be problematic? The grant has a specific budget for participant support stipends that are not assessed INDR.

09:43:11 From Pamela Keach to Perry King(Direct Message):
Can you send us the chat after the meeting so we can review questions/answers? I can't keep up :)

09:43:35 From Gwen Caramanica to Everyone:
To my CA&ES colleagues: Regarding the service tickets to correct Sponsored Projects conversion errors. We (Analyst Alley, Dept CAOs, and Lead Financial Analysts) are working on a single mass change request to correct these errors. Your CAO, Lead Financial Analyst, &/or Analyst Alley may ask for your assistance with this soon.

09:44:03 From Linda Jb Zhao to Everyone:
Reacted to "To my CA&ES colleagu..." with 👍

09:44:10 From Mario A Reina-Guerra to Everyone:
Replying to "Can a PM always have..."
I am going to have to research this - can you log a ticket in SNOW so I can track this request ?

09:44:12 From Jennifer Gouine to Everyone:
Reacted to "Is the purpose code ..." with 👍

09:44:18 From Christine Crum to Everyone:
Reacted to "To my CA&ES colleagu..." with 👍

09:44:24 From Leah Brewster (she/her) to Everyone:
Reacted to "I am going to have t..." with 👍

09:44:24 From Linda Jb Zhao to Everyone:
Replying to "To my CA&ES colleagu..."
We got it! Thanks CA&ES Analyst Alley!

09:44:50 From Linda Jb Zhao to Everyone:
Reacted to "Is the purpose code ..." with 👍

09:46:03 From Debra Henn (she/her/hers) to Everyone:

    Replying to "I am trying to make ..."

    Try the UCD Faculty and Department Portfolio Report.

09:46:24 From Debbie Hoelscher to Everyone:

    if an advance account didn't get approved in time before the black out period, and the award has since been received (this is a subrecipient award (FFT)) is that being addressed now with your awards set up team?

09:47:32 From Jennifer Torres to Everyone:

    subaward invoices route to the account manager first and PI next for approval

09:47:37 From Lenora Bruce to Everyone:

    Replying to "if an advance accoun..."

    If we received it, then it will be in our queue for processing.

09:47:59 From Veronica Chavez to Everyone:

    Reacted to "subaward invoices ro..." with 👍

09:48:29 From Jenna Wills to Everyone:

    Reacted to "subaward invoices ro..." with 👍

09:48:42 From Debbie Hoelscher to Everyone:

    Replying to "if an advance accoun..."

    I believe it was received....but now as a follow up, what if the award wasn't received. Would the Advance Account approval still prevail? and if so, how does that fit in the set up process?

09:49:17 From Debra Henn (she/her/hers) to Everyone:

    Replying to "Is the purpose code ..."

    Purpose code is an attribute of the Award. Wrong codes are a problem, please submit a ticket.

09:49:23 From Lenora Bruce to Everyone:

    Replying to "if an advance accoun..."

    feel free to submit a service now ticket or send me an email and I can check on it

09:51:33 From Tara Bradley to Everyone:

    How should invoices on sponsor templates be routed to C&GA? I'm concerned because I routed an AE ticket 6 days ago under Sponsored Project Billing and Reporting and am still awaiting signature.

09:51:47 From Asheley Greenlee to Everyone:

    Replying to "Is the purpose code ..."

    So should a separate project have been set up for any award with Participant Support in that case?

09:52:03 From Lenora Bruce to Everyone:

    Replying to "How should invoices ..."

    what is the ticket #?

09:52:25 From Tara Bradley to Everyone:

    Replying to "How should invoices ..."

    CASE0345909

09:53:27 From Tara Bradley to Everyone:

    Replying to "How should invoices ..."

Just want to make sure I'm routing these correctly with the new workflow

09:54:41 From Jennifer Gouine to Everyone:

To fill out the calendar year 2023 salary + benefit JV request template, where can we find a list of expenditure types?

09:56:13 From Elaina's OtterPilot to Everyone:

Add last minute items before the meeting ends: https://otter.ai/u/vyMAI1tDMRJBhPLx-mayxjH7LIQ?utm_source=va_chat_link_3

09:56:16 From Jenna Wills to Everyone:

For existing NIH clinical trial contracts where indirect costs are not allowable on patient care costs, do we need to have a separate project to separate those costs so indirects aren't charged on those costs?

09:57:50 From Becca Callahan-Petrucci to Everyone:

So when we provide information in the BANNER fund code request we will provide a 45 or 44 Purpose code?

09:58:34 From Gwen Caramanica to Everyone:

Replying to "So when we provide i..."

I think you will provide 78 even though the Project has a 44/45 purpose code … ?

09:58:53 From Gwen Caramanica to Everyone:

Replying to "So when we provide i..."

The expense is a 78 even though the funds are 44/45

09:59:05 From Kevin Waterson to Everyone:

Replying to "So when we provide i..."

It auto populates the chart string based on the search feature

09:59:26 From Gwen Caramanica to Everyone:

Reacted to "It auto populates th..." with 👍

09:59:27 From Mario A Reina-Guerra to Everyone:

Replying to "How should invoices ..."

We do have the ticket - we are looking at a glitch where tickets submitted in the service hub for Sponsored Project Billing and Reporting are creating CASES and not Incidents. We have visibility of these now but had to re-map SNOW. We are working on these ASAP.

09:59:44 From Becca Callahan-Petrucci to Everyone:

Replying to "So when we provide i..."

@Kevin Waterson the Banner fund code request does? I haven't done one yet.

09:59:44 From Debbie Hoelscher to Everyone:

thanks all!!!!

09:59:47 From Jenna Wills to Everyone:

Thank you!

09:59:50 From Farm Saetern to Everyone:

thank you!!

10:00:03 From Kevin Waterson to Everyone:

Replying to "So when we provide i..."

The Fin Aid site does...for undergrad payments

10:00:08 From Rani Asato to Everyone:

Thank you SPO and CGA this was very helpful to talk this out

10:00:16 From Amar to Everyone:

    Thank you James.

10:00:18 From Tam Pham to Everyone:

    Thank you all

10:00:21 From Arshna Sharma to Everyone:

    THANK YOU!