February 2024 Research Administration Forum Q&A

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Q1: At the last RAF it was mentioned that approval workflow should work after January 19. Will it apply to all POs even for legacy POs? Or just apply to POs created in BruinBuy *Plus* system?

A1: Correct, this is for both PO's (migrated and organic PO's in BruinBuy *Plus*).

Q2: In the last office hours for subaward, a question was raised where PI was asked to do a receiving. Was this a one off? A suggestion, can we disable the receiving function for PIs? This will confuse PIs.

A2: They can turn their notifications off, so they don't get that receiving notification.

Q3: Can you provide a link to the Subaward/Subcontract Tips and Resources Guide?

A3: Here is a link to the Subaward/Subcontract Tips and Resources Guide.

Q4: What is the procedure to clear invoice in H&I? Whom do we contact?

A4: You can reach out to Leilani Schelstrate at this email address: lschelstrate@finance.ucla.edu

Q5: Do POs auto-close? In the BruinBuy *Plus* FAQs, it seems that Declining Balance POs don't auto-close; but shouldn't other POs auto-close once PO amount is fully invoiced?

A5: Only the Catalog PO's (with the exception of Ricoh) close. Any other PO will need to be manually closed by submitting a ticket to the help@it.ucla.edu email address.

Q6: So we no longer need to add an extra $1 to keep a subaward PO open, is that correct? Since they do not close (even if spent in full) unless we submit a ticket asking for it to be closed?

A6: Yes, that is correct. I heard them instruct no longer adding the $1 in one of the office hours.

Q7: How much longer will the legacy POs migrate to BruinBuy *Plus*?

A7: We only have done one batch of migration, and that was at go-live. We brought over 38,000. There might be one more migration effort prior to us closing down BruinBuy.

Q8: They mentioned something about invoices going to the PIs and the Fund Managers. Is that happening? Because it doesn't sound like our FMs are getting anything, but we know there were a few new invoices sent (subawards).

A8: If invoices were submitted prior to 1/19, they were not triggering the workflow, but if an invoice is submitted to the noreply email address on or after 1/19, those invoices will trigger notifications & approvals in BruinBuy *Plus*.

Q9: What if our PO is sitting on I status in the legacy system? What happens then? Like it was not posted by purchasing.

A9: You can reach out to Leilani Schelstrate at this email address: lschelstrate@finance.ucla.edu

Extramural Fund Management

Q1: Once ECC is brought online, will it be used only for new reports, or also for older overdue reports that have not been resolvable with ERS?

A1: A current plan is not to convert the old data to the new system, meaning that older overdue reports in the ERS will need to be completed in the ERS, but there will be more updates to share at the future RAFs.

Q2: One of our professors had a question about effort report certification for an employee who was on medical / sick leave. For the new effort reporting certification - will there be language in the certification statement that allows a PI to certify that the salary was paid in accordance to university policy on the grant (but not specifically certifying that effort was contributed to the grant, since the employee would not be contributing effort while they are out on leave)?

A2: A great question. This is one of scenarios we will think about as we evaluate certification methodologies (effort reporting, project certification, or hybrid) and have it in our mind as we develop the business processes around the new methodology we select. Thank you.