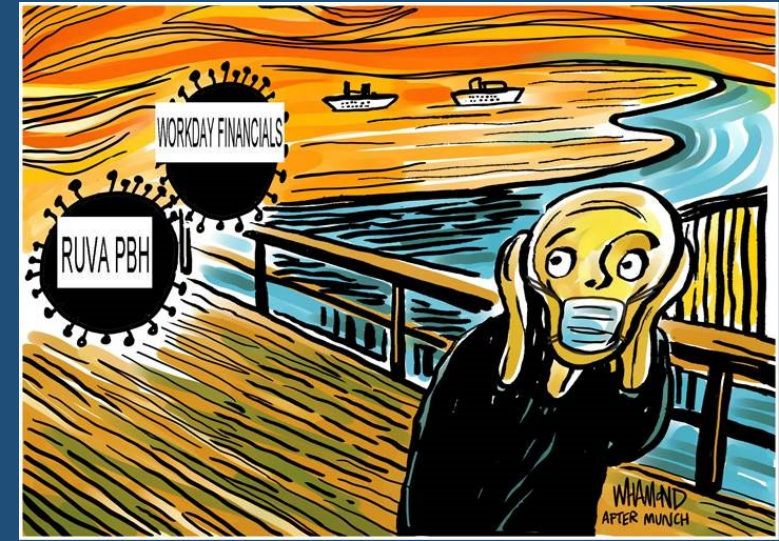# SOM RAM

21 July 2022

WORKDAY FINANCIALS

RUVA PBH

WHAMOND
AFTER MUNCH

CURRENT Topics

o RAMP UP – Kayla Calvo
  o Mentor application [here](#)

[CONGRATULATIONS, Kayla, on your [Building Bridges](#) award!!]

o New Clinical Trial budgeting template – Alex Torres

o Welcome to Ryan Babcock, new SOMOGC Post-Award Administrator!

o ALL transactions MUST be submitted to somogc@hscmail.mcc.virginia.edu in order to be logged into our SOMOGC internal work queue. We cannot manage our workflow from the rPBH notifications or dashboard and if we do not receive an email to our SOMOGC address, your transaction will not be processed!

REMINDERS, Notices, & Updates

o ResearchUVA Powered By Huron – Tips, Tricks, and Reminders

    o New [Clinical Trial Agreement Submission Process Job Aid](#) available on the Training & Resources > Checklists & Guides section of our website
        o Be sure to correctly link your FP and CSA using the tips in the Job Aid!

    o New RPPR and JIT Cover Sheets available on the Forms & Templates > General Resources section of our website
        o [JIT Cover Sheet](#)
        o [RPPR Cover Sheet](#)
        o *REQUIRED* for all new JIT or RPPR submissions

    o When submitting a proposal with multiple PIs or collaborating departments, you can prepare separate budgets for each unit and the system will consolidate them for you in the final proposal. Just be sure to click "Include In Consolidated Budgets" on each individual budget SmartForm. [Question #5 on the "General Budget Info" form]

    o When preparing a Cost Share budget, be sure NOT to check "Include in Consolidated Budgets" on the SmartForm unless the Cost Share is required by the sponsor.

REMINDERS, Notices, & Updates

o Convert Outlook .msg files to .eml files for upload to rPBH:
  o Step 1 – save .msg file as .txt file
  o Step 2 – open .txt file and save as .eml file
  o You will need to upload all email attachments separately

o Be sure to use Manage Relationships to link related records, e.g. linking an Outgoing Subaward Agreement to the parent Award record, linking a CDA to the subsequent CSA record, etc

o Resubmission and Renewal proposals should be initiated from the original Funding Proposal record. Do NOT create a new proposal record because it cannot be changed or linked after the fact. You will have to redo the record if it is not properly categorized!

o Please consult the SOM Routing and Approvals Job Aid if you are unsure about how to submit/route/approve a transaction. Transactions can easily get lost if these processes are not followed. And ALWAYS send a notification email to SOMOGC@hscmail.mcc.virginia.edu to ensure we get the transaction logged into our work queue. We can re-route or pull back transactions that are routed incorrectly, but we can't process what we can't see!

JENKINS, GET ME A DEAD HORSE

I'D LIKE TO BEAT IT
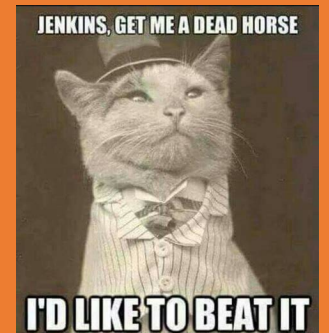
REMINDERS, Notices, & Updates

o Please remember to update the Workday Personnel Budget Category on the Personnel Cost Definition page of all Funding Proposals. Without this data point, salaries will not categorize properly.

o Clinical Trial Amendments
  o For CTAs that pre-date rPBH - submit a new CSA-type Agreement record in rPBH
  o For CTAs started in rPBH - navigate to the Agreement record, use Manage Access to name yourself as the Primary Contact, click the "Create Amendment" activity

REMINDERS, Notices, & Updates

o New Faculty Compliance Report (COI, EAD, UFI, etc) available on the QlikSense Hub, Finance stream
  o Research Conflict of Interest (COI) [Limited]
  o This replaces the previous UBI report which is no longer updated

o Temp Svcs fees are no longer allowed on Federal grant awards (this is an administrative fee that is already accounted for in the F&A rate)

o Paper documentation is no longer required for expense transactions (POs, Invoices, packing slips, etc) – scan documents to Workday as the system of record and then destroy after 60 days

o SOMOGC will no longer be sending monthly reminders for upcoming RPPRs. You can check the status of your upcoming RPPRs in eRA Commons via the Status > Pending Progress Report search feature.