

OSR Leadership Panel

Brian Bertlshofer

Director, Cost Analysis & Compliance

Amanda Chang

Assistant Director, Operations

Jenifer Gwaltney

Director, Sponsored Projects Accounting

David Paul

Assistant Vice Chancellor

Jennifer Teixeira

Sr. Director, Research Administration

**8th Annual Symposium
for Research
Administrators**

November 11, 2020



2020

UNC SYMPOSIUM

for

RESEARCH ADMINISTRATORS

Agenda

- Overview of OSR Units
- Training & Resources
- Projects & Programs
- Panel Questions
- Upcoming Projects and Updates
- Q & A

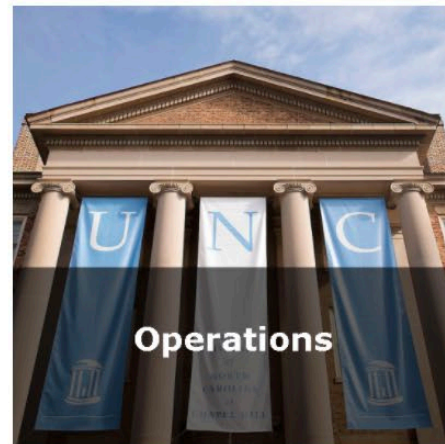
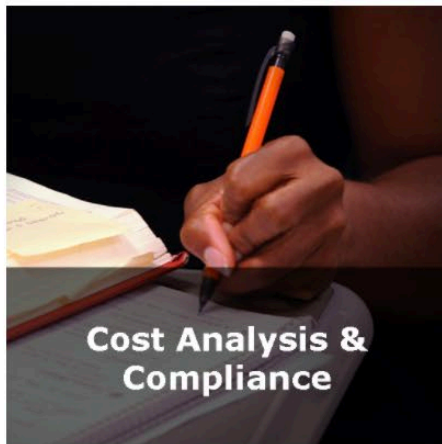


Office of Sponsored Research

OSR Goal

To support and advance the University's research mission by providing leadership and expertise in sponsored program administration.

OSR Business Units



Cost Analysis & Compliance

Audit and Financial Compliance

- **Pre- and Post- Audit Review**
 - **Pre-Audit:** Review transactions for allowability *before* posting
 - **Post-Audit:** Review transactions for allowability *after* posting/payment
- **Subrecipient Monitoring**
 - Review of Subrecipient's Annual Audit/Single Audit Reports
 - Pre-Audit review and sample audit of subrecipient invoices
- **Sponsor Audit Support**
 - Annual Single Audit/Federal Compliance
 - Audit requests from sponsors

Cost Analysis & Compliance

Cost Accounting and Central Effort Administration

- **Cost Accounting**
 - Prepare and negotiate the Facilities and Administrative (F&A) cost rate proposal
 - Review and approve all recharge center rate proposals
 - Cost Accounting Disclosure Statement (DS-2)
 - Other cost analysis such as Fringe rate development for sponsored research proposals
- **Effort Reporting**
 - Review and approve all ePARs impacting sponsored research activity
 - Monitors effort certification process on sponsored research activity

JENNIFER TEIXEIRA, SR. DIRECTOR

Research Administration

Research Administration Teams 1-7

- **Proposal:** Review, Approval and Submission
- **Award:** Negotiation, Compliance Review, Risk Analysis, Award Acceptance, and Set-up
- **Post-Award:** Including but not limited to Modifications, Prior Approvals, Budget Revisions

Outgoing Subaward Team

- Agreement Documenting, Drafting, Negotiation, Risk Analysis and Final Execution

Industry Contracting Team

- Contract Drafting and Negotiation for Industry Clinical Trial Agreements including PI Initiated, Subsite Agreements, Industry Standard Research Agreements, Data Use Agreements, Confidentiality Agreements, Core Recharge Agreements, and Master Agreements

Sponsored Projects Accounting

Sponsored Projects Accounting

- Responsible for all billing and financial reporting for contracts, grants and cooperative agreements, award closeouts and assists cash management with accounts receivable.

Cash Management

- Cash Management processes (posts) all payments received, AR collections, sponsor refunds and LOC draws.

Financial Quality Control and Data Management

- Provide functional and technical support for OSR. Data management sets up awards in RAMSeS and Peoplesoft. *They are our Peoplesoft experts!*

Operations

OSR Central Inbox/Portal Support

- ResAdminOSR@unc.edu – general research admin & “when in doubt”
- OSRBilling@unc.edu – billing, invoicing, reporting
- OSRReporting@unc.edu – final invention statement requests/submissions
- OSRCommunications@unc.edu – communication and training requests
- [ServiceNow](#) – ConnectCarolina transaction systems support (budget overrides)

Training

- OSR Webinars, Carolina RAPIDs, RAFTs, and [Symposium](#)

Communications

- OSR and related websites, policy/procedure/guidance announcements, and newsletters

RECENT HIGHLIGHTS

Training & Resources



Inaugural Town Hall



Symposium 2019



RAFTs



SRA: NIH Training



Webinars



Carolina RAPIDs

RECENT HIGHLIGHTS

Projects & Programs



Operational
Excellence:
Playbooks



Project
Notifications



RAM Tracker
Search



Subagreement
Initiation Portal
(SIP)



PANEL QUESTIONS – JEN GWALTNEY

The Project Notifications we get now are helpful, but can the changes made also be stated in the emails? Currently, we only know what has changed by looking at the attachment.

PANEL QUESTIONS – JENN TEIXEIRA

We work in a center where several PIs' non-sponsored salary support comes entirely from the center and not their home departments. They are often included on IPFs from other depts without our center affiliated, listed as a work location or included in F&A sharing. When I ask the submitting dept. to add our center to their IPF, I am usually told these changes cannot be made by depts after submission.

Please address how to recognize when any faculty is associated with a center and the proper way to add them to a proposal before & after submission.

PANEL QUESTIONS – AMANDA CHANG

Is there training available to share with new staff on exactly what OSR is responsible for and does? We're looking for something that is more guided and detailed than what you have on the website. The website is useful but sometimes trying to find a specific topic for assistance can be a challenge.

PANEL QUESTIONS – JENN TEIXEIRA, AMANDA CHANG

Is there an update on Single Submission or any additional training available for RAMSeS before the new application is completed?

PANEL QUESTIONS – BRIAN BERTLSHOFER

Are the new F&A rates going to be published soon?

PANEL QUESTIONS – DAVID PAUL

This is just a comment that I'm very happy with all the resources OSR has been helping us with! I'm interested to learn what else there is in the pipeline too. What are other projects OSR is working on?

THANK YOU !

UPCOMING

Projects & Updates



- RAM Reports Enhancements
- Other Support Automated Tool
- Operational Excellence: PACT
- SRA: NSF Training
- Carolina RAPIDs: Certificate



REBRANDING

Office of Sponsored Research ...

OFFICE OF SPONSORED PROGRAMS

JULY 1, 2022



OSR Survey

Releasing after Symposium
November 16

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www.symposium.web.unc.edu | OSR_Symposium@unc.edu



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QUESTIONS

