Business Process Advisory Group – August 14, 2015 – INSCC Room 110

Attending:

Alayne Merrit, FBS

Ann Blanchard, UGS

Anne Maxwell, FAO

Bobbie Harris, COE

Chalalai Charbsuwan, KUED

Cindy De Dios, FBS

Dave Bardsley, PHARM

Dean Church, FBS

Fed Hon, HU

Georgette Kimberly, FBS

Hedy Hu, FBS

James Steffan, MBM

Jim Turner, EIHG

Joni Wigger, FBS

Judy Chan, FBS

Kelly Peterson, FBS

Kevin Ballard, FBS

Kristine VanAusdal, FBS

Linda Jensen, OPHTH

Magali Coburn, SCI

Marilyn Burton, SOM

Mary Louise Hughes, FBS

Megan Warren, NURS

Niloofar Bakhti, EHSL

Pam Webb, FBS

Rose Simper, ED

Sandy Hughes, BUD

Shelly Kruger, CPPA

Steve Brown, CHEM

Tanis Garcia, COMP

Utahana Miller, DESB

Angela Simmonds, COS

Ann Buffington, ADM

Ashley Hisa, FBS

Carl Larson, FBS

Clay Postma, UIT

Craig Merritt, FBS

Dawn Atterbury, FBS

Elizabeth Woolsey, SOM

Dennis Laros, PSYCH

Glendon Mitchell, FBS

Heidi Slack, FBS

Jennifer Long-Pratt, FBS

John Levandowski, FBS

Josephine Rudd, FBS

Karren Nichols, SUS

Ken Erickson, FBS

Kevon Balls, UIT

Kristy Green, CA

Lisa Clayton, GEOG

Marcia Cook, CSME

Mark Patterson, FBS

Matthew Castillo, CFA

Michael Smith, FBS

Nora Ishihara, KUED

Reena Pamarthi, FBS

Sally Petersen, FBS

Scott Patten, FBS

Stacey Oliver, FBS

Susan Dudley, FBS

Taralyn Poulson, FBS

Yuka James, LAW

Sole Source Form

A new **Sole Source Request** form is on the **Purchasing Forms page** on the FBS website. This form should be used each time a Sole Source Supplier is used. (even if the supplier has been used before) Sole Source suppliers can be used in UShop.

FRR Timelines and IPA Project Management

FFR (Federal Financial Reports) for NIH and DHHS must have costs posted within 90 days. Departments should play an active role when an IPA (VA) project is setup. This will help with timely payments. Make sure documents have been approved during the setup process.

Cost Transfers

The process for deciding how to transfer costs on Projects was presented.   A **Cost Transfer Decision Tree** was used. Below are instances where a Cost Transfer would not be used.

Non-Exempt Personal Services Correction
- If it's all on the same award - **Payroll Reallocation**
- If it's a credit to the Project - **Payroll Reallocation**
- If the credit is to a *DEFAULT ACTIVITY** - **Payroll Reallocation**

Exempt Personal Services Correction
- If it's in-quarter - **EDR**
- If a PAR has not been completed - **ePAR**
- If it's all on the same award - **Payroll Reallocation**

Non-Personal Services Correction
- If it's all on the same award - **e-Journal**
- If it's a credit to the Project - **e-Journal**
- If the credit is to a *DEFAULT ACTIVITY** - **e-Journal**

*DEFAULT ACTIVITY: an Activity whose purpose is to book expenses when the Project cannot be charged (payroll suspense default Activity, PCard default Activity, etc.)

e-PAR

e-PAR was used for the 4th quarter 2015. A **presentation** was given on the success of the rollout.

USHOP

UShop was successfully rolled out to the pilot departments. It is being rolled out to many more departments. The **UShop** team was introduced and answered many questions:

- Perry Hull
- Mike Smith
- Mary Louise Hughes
- Maria Nielsen

Accounts Payable, Purchasing, UIT and Financial Solutions are also providing valuable resources to the UShop rollout.   To request training, visit the **UShop** webpage. For complete training, select **the UShop ONBOARDING** link. For training on buying using just the "Punch-Out" suppliers, select the **UShop TRAINING LITE** link.

New Management Report Icons

Two new icons have been added to Management Reports for retrieving documents. To learn more read **this article** on the **P2P blog**.

Next BPAG Meeting—September 11, 2015