

QDB BUDGET PERIOD VS PROJECT PERIOD UPDATE

Revised November 5, 2024


OVERVIEW

Some Sponsors award the **full project period funding amount up front with minimal stipulations**. However, some Sponsors include restrictive stipulations for awards that provide full project period funding. UCLA's Office of Contract and Grant Administration (OCGA) reviews award terms and conditions to determine which awards include restrictive/high risk payment terms and will be subject to OCGA's Annual Renewal Review (ARR) requirement.

1. **Protocol for Restrictive/High Risk payment terms:** OCGA will set up the award subject to an Annual Renewal Review (ARR) prior to processing continuation year funding & Award Snapshot.
 - Example Restrictive/High Risk terms:
 - i. Continuation funding is contingent upon **approval** of reports (i.e. progress, financial, etc.)
 - ii. Awards with mutli-year budgets that exceed \$500,000 per year
2. **Protocol for Non-Restrictive/Low Risk payment terms:** OCGA will set up all years up front. Therefore, the **budget period and project period will be identical**.
 - Example Non-Restrictive/Low Risk term:
 - i. Continuation funding is contingent only on **receipt** of reports (i.e. progress, financial, etc.)
 - ii. Sponsor examples:

American Heart Association (AHA)	American College of Gastroenterology (ACG)	American Gastroenterology Association (AGA)	Department of Defense (DOD)	Doris Duke Foundation
Robert Wood Johnson Foundation (RWJF)				

- Notification that an award is set up under this protocol, with a single budget period for the entire project period, will be in the alert section of the Award Snapshot.
 - Example: An award that has a 4-year budget of \$400,000 per year will be set up in a single sequence as \$1,600,000 for the project and budget period of 11/01/2024 through 10/31/2028. See sample screenshots below.
- **Fund Manager Action Items:**
 - **Submit a ticket to DGIT to request a budget period update in QDB/FPM. See instructions below.**
 - **Best Practice: Transfer any future years' appropriation to a second PI cost center, so that the PI does not spend all of the funds in the current year.**



University of California, Los Angeles
Award Snapshot

Page 1 of Award Snapshot

Section I: Award Summary

Principal Investigator: [REDACTED]	Fund Number: [REDACTED]
Sponsor: [REDACTED]	Sponsor Award Number: [REDACTED]
Administering Unit: [REDACTED]	Prime Sponsor: N/A
Project Title: [REDACTED]	Current Action: New
Current Budget Period: 11/1/2024 - 10/31/2028	Funds Awarded this Action: \$2,520,000
Project Period: 11/1/2024 - 10/31/2028	Total Funds Awarded to Date: \$2,520,000

- See Section VIII for Other Investigators
- For a History of Actions on this award, refer to the Award Snapshot Attachment

Section II: Special Attention Needed

- Changes in the status of the Principal Investigator or other key personnel on the award require [prior approval](#) from the Sponsor. Requests for prior approval must be processed through OCGA. Notify OCGA in advance or as soon as you become aware of any changes (or anything requiring prior approval).
- Review the Award Snapshot Attachment and the Award document for additional terms and conditions.

Section III: Award Demographics

Sponsor Award Number: [REDACTED]	UCLA PATS Number: [REDACTED]
Proposal Type: New	Award Type: Grant
Program Type: Basic Org Research	Special Program Type: Not Applicable
Award Status: Awarded/Fully Executed	Location: On Site
Special Payment Type: None	Pre-Award Spend: 90 days 8/3/2024

Budget Period	Transaction Budget Period	Direct	F&A	Total	F&A Rate	F&A Base	Payment Basis	Award Status	Action Type	Carry Forward Restricted
1	11/1/2024 - 10/31/2028	\$1,600,000	\$920,000	\$2,520,000	57.5%	MTDC	Cost Reimb	Awarded/Fully Executed	New	No

University of California, Los Angeles
Award Snapshot Attachment

Page ~3 of Award Snapshot

UCLA PATS NUMBER: [REDACTED]

Alert(s)

- Please review and adhere to the award terms and conditions.
- Budget revisions of twenty percent (20%) or more of the annual budget require DDF approval through a written request.
- Funding for all years has been allocated.


*****Please note: Updates to budget period end dates in QDB/FPM will be required annually through the entire project period. Once a budget period ends, the below steps must be taken again to extend the end date for the next budget period in order for financial reports to pull the current budget period dates.*****

*****Updates only affect the EDA Jump Server version of QDB/FPM, not the Excel Add-in on your own personal desktop.*****


HOW TO REQUEST AN UPDATE TO THE BUDGET PERIODS IN QDB/FPM

- Go to DGIT Data Operations Website: <https://it.uclahealth.org/about/dgit/teams/data-operations>
- Scroll to the bottom** “GET HELP” section and click the words “Submit a ticket”


GET HELP




Call 310-267-CARE



Submit a ticket



Email



Visit IT Connect

- Complete ticket information using below screenshot as a sample
 - Short description:** Enter “DGSOM QDB/FPM Manual Budget Period Update Request”

- b. **Open on behalf of this customer/Contact number for ticket:** Ensure your name & contact phone # is listed so you automatically receive updates regarding this ticket
 - c. **Customer watch list:** If applicable, enter names of individuals you would like to receive follow-up emails regarding this request. If more than one individual, choose one at a time from drop down and add all personnel, as needed.
 - d. **What is happening?:** Choose "Other" in dropdown
 - e. **Please describe your issue below:** Enter the below required information:
 - i. Note: "Assign to DGIT Data-Operations Team."
 - ii. Full Accounting Unit (FAU) that needs to be updated
 - iii. New budget period end date requested
 - iv. Attachment: Not needed
4. Submit – Turnaround time should be ~2-3 business days to have update reflected in FPM/QDB.

Submit a Ticket

Important: For patient safety or urgent issues, immediately call Customer Care at (310) 267-CARE (2273) and our team will ensure proper escalation.

Use this form to open a ticket for IT. Provide as much detail as possible to help us to best resolve or direct your request. You will receive a confirmation notification and can review your ticket status in [My Requests](#).

*Short description ?
Provide a descriptive short description. Be specific, such as "Unable to access email from Outlook Desktop." ✕
As you enter the description, please note related articles will display that may assist you in quickly resolving the issue described.

DGSOM QDB/FPM Manual Budget Period Update Request **3a**

Related Search Results ▾

*Open on behalf of this customer ?
Rujanuruks, Catherine **3b**

Customer watch list ? **3c**

*Contact number for ticket ?
(310) 206-6287

Alternate number

*What is happening? ? **3d**
Other

*Please describe your issue below ? **3e**
Assign to DGIT Data-Operations Team. Please update budget period end date for 441357-AB-54321 from 03/31/2027 to 03/31/2025 (04/01/2024-03/31/2025). Thank you!

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Submit