

SUB 08 ONLINE RESPONSE SUBMISSIONS

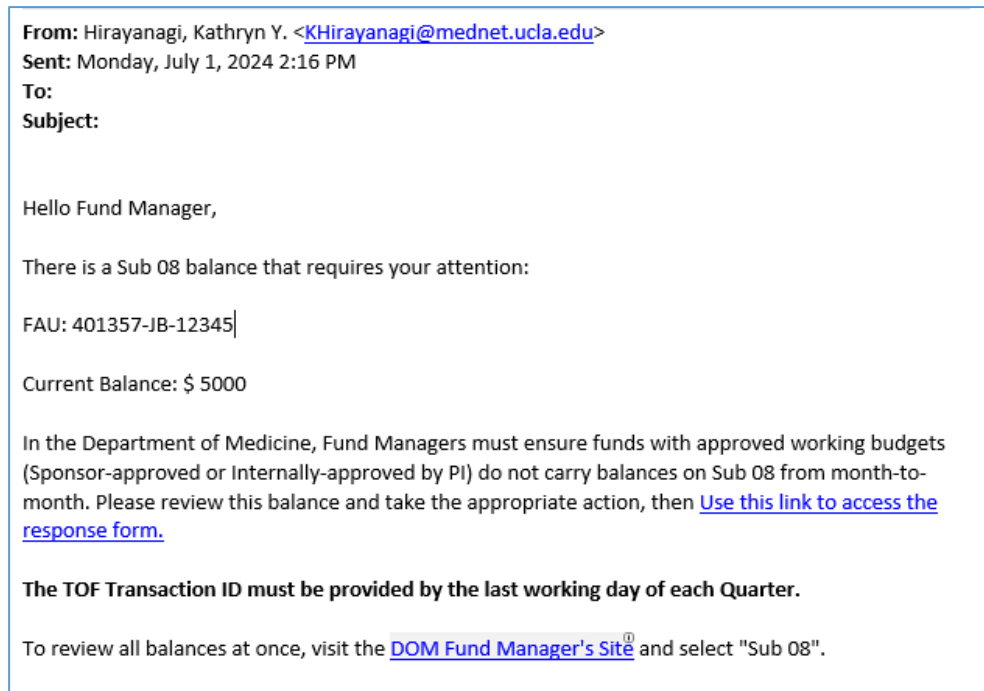
Revised July 5, 2024

OVERVIEW

Department of Medicine Research Administrators are required to address assigned Sub 08 balances via the DOM research administrator's Team Site: [Sub 08](#)

In most cases, research administrators should resolve Sub 08 Balances by processing a transfer of fund (TOF) to allocate appropriated funds into the appropriate budget category subs. On the rare occasion a contract & grant (C&G) fund requires a balance to remain on Sub 08 (expenditures regularly post to Sub 08, for one example) an exception request may be submitted. Funds with an approved exception will be omitted either permanently, or temporarily, dependent on the justification provided.

Research administrators will receive an email notice for each balance requiring their attention. The expectation is to process the necessary TOF(s) (or compile backup materials) then proceed to the response application to report the action taken.



TIMELINE/DUE DATE

Responses, including MSO and DOM ORA review, are due by **the last working day of each quarter.**

Example: Q3 (July-Sept) 2024 responses are due September 30, 2024

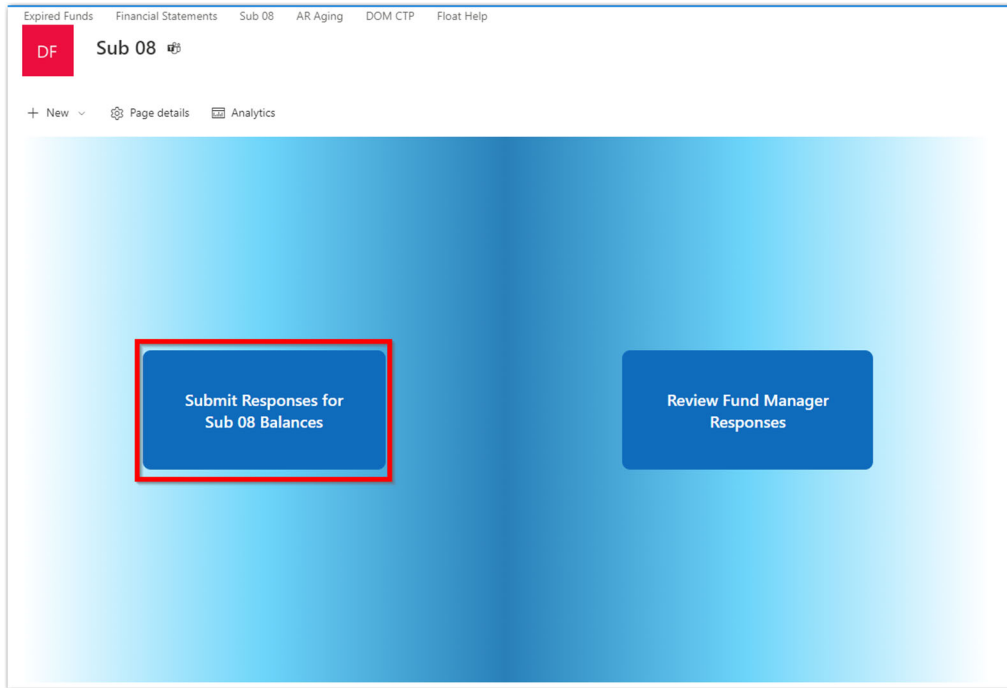
TO REQUEST ACCESS

Method 1: Request Access through the site's built-in request feature. Upon first login, if you have not already been granted access to the site, you will be prompted to request access. If your access request is urgent, or if you have not received access within 1 business day, please prompt Kat (khirayanagi@mednet.ucla.edu) to check for the access request.

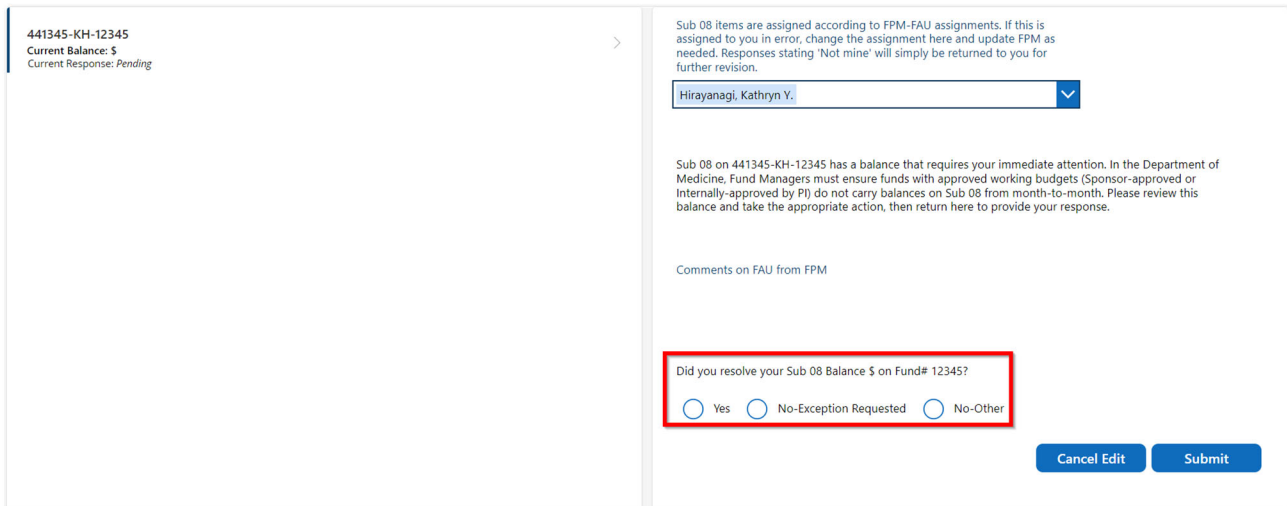
Method 2: Email khirayanagi@mednet.ucla.edu with the name, Mednet email, and Division code(s) of the individual(s) requiring access.

TO NAVIGATE THE APPLICATION

From the Sub 08 home page, click "Submit Responses for Sub 08 Balances"



The left-hand menu will display all FAUs with Sub 08 balances assigned to the research administrator logged in. Select the FAU the current response needs to be provided for, then select the resolution action from the response screen (right)



RESPONSE OPTIONS

Yes: If a TOF was processed, please provide the TOF ID and processing date. Upload attachments as necessary. Attachments are not required and are the discretion of the research administrator completing the form.

Did you resolve your Sub 08 Balance \$ on Fund# 12345?

Yes No-Exception Requested No-Other

Provide the TOF ID and Date TOF was performed.

TOF ID:

Date Processed:

Optional: Provide attachments as determined necessary

There is nothing attached.

No-Exception Requested: If you are requesting an exception, provide a strong explanation that will need to be approved by both the MSO and DOM ORA.

Example of explanations that will not be accepted:

- I did not have enough time to process the TOF
 - Research administrators are provided three months to process the necessary adjustment. If assistance is needed, a help request should be submitted to the Float Team (DOMFMAssist@mednet.ucla.edu) prior to the deadline.
- I do not have an established budget for this fund
 - All C&G Funds must have a Pre-Award budget developed before a fund may be issued. If a rebudget is in-process, a TOF is required according to the Pre-Award budget. Subsequent TOFs due to rebudgeting are at the discretion of the research administrator. For Industry-Clinical Trials, the AR Budget and/or Projections may be used as the reference in lieu of a Post-Award Expenditure Budget.
- This is not my FAU
 - This application allows for self-service reassignment. Assignments default to the Research administrator assigned FPM. If a change is needed, only the assigned Research administrator may reassign to the new person. If making an assignment change, make sure to [update the FPM assignment](#) so future reports will be sent directly to the appropriate research administrator.

Submissions requesting an exception will be reviewed on a case-by-case basis to determine if it is reasonable that a TOF cannot be processed to clear the balance and appropriate funds to budget category expense subs. The justification must be included with the exception request, and is subject to approval by MSO and DOM ORA.


Did you resolve your Sub 08 Balance \$ on Fund# 12345?

Yes No-Exception Requested No-Other

Exception requests are subject to approval by MSO and DOM ORA. Provide your explanation below for review. 248 characters remaining

Strong explanation here

Optional: Provide attachments as determined necessary

There is nothing attached.
 Attach file

No-Other: Use this option if the balance will be cleared via action other than TOF. This option should not be used to request exceptions to not address the balance in the quarter the item was assigned.

Examples:

- The C&G Fund is closing, and the balance is appropriated to Sub 08 in preparation for closeout (all other subs are zeroed). EFM is responsible for clearing the remaining balance upon closeout.
- One or more expenditures on Sub 08 posted in error, and these expenses were adjusted to clear the balance via NPEAR/Journal. When this is the case, provide the transaction IDs and dates.

Research administrators must include a comment explaining the actions taken to resolve the balance when this option is selected.


Did you resolve your Sub 08 Balance \$4433 on Fund# 77924?

Yes No-Exception Requested No-Other

If an exception needs to be granted for this fund, please change response to 'No-Exception Requested'. Otherwise, provide your 'Other' explanation here for review. 248 characters remaining

Provide other explanation here.

Optional: Provide attachments as determined necessary

There is nothing attached.
 Attach file