

**DIVISION OF SOCIAL SCIENCES
RESEARCH GUIDE FOR PRINCIPAL INVESTIGATORS**

INTRODUCTION	2
I. RESEARCH ADMINISTRATION SUPPORT	2
A. Research Funding	
1. Extramurally Funded Awards	
2. Sub-Awards	
3. UC Funded Awards	
B. Research Support	
1. Your Research Analyst	
2. Budget Management	
II. REIMBURSEMENT GUIDELINES	4
A. Managing Your Expenses	
1. Allowability	
2. Reimbursement Options	
3. UCSC Credit Cards	
B. CruzBuy – Purchasing Goods & Services	
C. Miscellaneous Expenses – Direct Pay Form	
D. Travel Reimbursements	
1. Travel Forms	
2. Travel Advances	
3. Group Travel	
4. Before You Make Plans	
5. Making Travel Arrangements	
6. Car Rentals	
7. After You Return – Post Travel Reimbursement	
8. Reimbursing Foreign Nationals	
E. Entertainment Expenses	
III. FINANCIAL TRANSACTION GUIDELINES.....	7
A. Recharges	
B. Expense/Cost Transfers	
C. Fund Transfers – Awards & Support to other units	
IV. PAYROLL OPTIONS & HIRING STUDENT/STAFF/ACADEMIC POSITIONS	8
A. Course Buy Outs – Course Relief	
B. Summer Salary	
C. Graduate Student Researchers - GSR	
D. Undergraduates	
E. Academic Positions	
F. Staff Positions	
V. EFFORT REPORTING SYSTEM (ERS)	9
VI. APPENDICES.....	10
Appendix 1: What is a FOAPAL?	
Appendix 2: Acronyms	

INTRODUCTION



Welcome to the Division of Social Sciences Research Guide.

Although the research administration world is one of compliance, regulation and procedure and is in sharp contrast to the research world of creation of new knowledge and advancing the human condition, Social Sciences has worked and will continue to work towards simplifying your involvement in compliance issues as much as possible.

We have tried to keep the information simple and concise by highlighting the most common and most important procedures. The purpose of this guide is to provide you with the tools and information you need to manage your award budgets. Even though financial management is an important part of your responsibility, we understand that most of you would rather be doing your research. With that in mind, we have created a resource we hope will help you navigate the University's research administration systems quickly and easily. Your research analyst (RA) is your primary resource to help support you in the financial management of your awards and for policy and procedure guidance. This guide uses a number of acronyms detailed in appendix 2.

I. RESEARCH ADMINISTRATION SUPPORT

A. Research Funding

** Each research account has a unique identifier called a FOAPAL, defined in Appendix 1.*

- 1. Extramurally Funded Awards** - All extramural proposals from any institution for research at UCSC must be submitted through the Office of Sponsored Projects (OSP). This includes: contracts, sub-awards No Cost Time Extensions (NCTE) and re-budgeting requests on active awards. OSP website:



<http://research.ucsc.edu/osp.shtml>

IMPORTANT- Submit proposals at least four weeks prior to the due date.

Social Sciences grant application support staff are located in SocSci 1, Rooms 201 and 203. Ashlee Tews- ashleeac@ucsc.edu 459-1644 and Gwendolyn Keith- gtkeith@ucsc.edu 459-2257 are available to help you locate and apply for grants. For more information on the proposal and award process, see OSP's Handbook for Principal Investigators: http://research.ucsc.edu/osp_forms.shtml

If a grant is awarded to PI's in more than one division, funds are generally transferred from the lead PI's division for specific expenses or scopes of work. Your RA can assist you with a memorandum of understanding (MOU) that may be required to obtain clear agreement.

- 2. Sub-Awards** - Some research awards include sub-awards to other entities. This is normally determined at the time the proposal is submitted. After an award is granted, OSP issues the sub-award agreement. Sub-awards are paid when the sub-awardee invoices UCSC. Like all other expenditures, you retain primary responsibility for assuring that the terms of the sub-award are being met. Sub-award invoices go to your RA for processing. Your RA will obtain your authorization and approval before submitting to accounting for payment. If UCSC were the sub-awardee, UCSC would issue an invoice.
- 3. UC Funded Awards –Division Awards** for research and related purposes include: start-up, retention, department chair, misc. research, division research and emeriti enhancement. The **Academic Senate** is a common source of campus funding for faculty research. If you are planning to present a paper at a conference or give a seminar, you can apply for up to \$650 annually, or \$1,000 every third year, with an Academic Senate's COR Travel award. In addition to travel grants, the Academic Senate offers annual research grants from \$1,500 to \$20,000 (FRG- Faculty Research Grants and SRG- Special Research Grants). See their website for awards, guidelines and application forms: <http://senate.ucsc.edu/>

UC's Multi Campus Research Program Initiatives (MRPI) program provides research funding in a variety of disciplines. Examples include: Pacific Rim, Human Rights Institute, Energy Institute, New Racial Studies, Human Rights Center, All Campus Consortium on Research for Diversity (ACCORD), Collaborative Research for an Equitable California (CCREC). More information here: <http://www.ucop.edu/mrpi/>

NOTE: None of these UC awards flow through OSP but your RA administers them in the same manner as extramural awards.

B. Research Analyst Support

1. Your Research Analyst (RA)



Assistant Dean David Sonnenberg supervises the Research Administration Manager, Mark Silva.

RA's are your financial partners. They provide budget reports, financial management assistance and help with navigating the University's administrative and financial systems. RAs are also responsible for assuring that all funds under their purview are spent appropriately, according to Federal, State and UC regulations, policies and procedures. Room 271, Humanities & Social Sciences, fax number: [459-1296](tel:459-1296).

Mark Silva	Research Administration Manager	mssilva@ucsc.edu	459-2124
Sandra Ewart	Research Analyst	sandye@ucsc.edu	502-7434
Sandy Frahm	Research Analyst	slfrahm@ucsc.edu	459-5009
Cynthia Kong	Research Analyst	ckong@ucsc.edu	459-3215
Jane deVette	Research Analyst	jdevette@ucsc.edu	502-7520

This office is responsible for overseeing all research funds that flow through the Social Sciences Division. Your department manager handles funds that are provided to faculty for non-research purposes (e.g., department funds for instructional purposes).

2. Budget Management - Research administration and other offices on campus are here to assist you in managing your awards. As a PI, you have the primary fiduciary responsibility for your funds. Your primary budget management and monitoring tool are InfoView reports. UC policy requires you to follow generally accepted accounting principles (GAAP) and review your InfoView reports monthly, quarterly or semi-annually, depending on award type, size and volume of transactions (see below). This gives you the opportunity to ensure that all transactions are appropriate and valid (also called Ledger Review). If any discrepancies or questions arise, discuss them with your RA as soon as possible.

Your RA will email InfoView reports to you for your review based on the following matrix:

Transactions-Monthly Volume	Average Transaction Value		
	< \$2,500	\$2.5k - \$10k	> \$10,000
Federal or State	Monthly	Monthly	Monthly
> 50	Monthly	Monthly	Monthly
50 - 11	Quarterly	Monthly	Monthly
10 or less	Semi-Annual	Quarterly	Monthly

RA's will also send financial spreadsheets for all awards with indirect rates and when projecting expenses is helpful. These spreadsheets provide a more accurate accounting of indirect costs and expenses that don't immediately update in the campus financial system.

New PI's need to sign an InfoView Review Agreement per division procedure. By signing, you agree to review your InfoView reports according to the table above. InfoView reports are available on-line as an on-demand system for immediate access at any time. Your RA can set up reports and send them to your InfoView inbox.

II. REIMBURSEMENT GUIDELINES

- It is important to consider how you will pay for expenses before you incur any costs -

A. Managing Your Expenses

1. Allowability - Before incurring an expense, it is important to know whether it is allowed by the funding source. Your RA can assist you if needed. In all cases, the expense must be allowable on the funding source, determined as follows:

- ◆ *Allowable*- on a funding source? If you are not sure, check your award documents, the grantor's policies & procedures or contact your RA.
- ◆ *Appropriate*- is it directly related to the goals of your funding source? For extramurally funded awards, this is determined by your award and budget. Was the expense incurred within the budget period of the award?
- ◆ *Compliant*- is it allowed by policy, law, agreement and/or professional standard? This is determined by UCSC policy and by controlling UC, state and federal regulations.
- ◆ *Reasonable*- does the nature and amount of the cost reflect what a prudent person would have done under the circumstances at the time the cost was incurred?
- ◆ *Funded*- is there sufficient funding to cover the expenses or an expenditure adjustment?

2. Reimbursement Options - For reimbursements to non-UCSC employees, or employees who've never previously been reimbursed, a 204 form (Payee Setup) is needed initially. For anyone wanting to receive reimbursements as electronic payments, an Electronic Funds Transfer Authorization form must be completed. It takes 2-3 weeks to set up electronic transfers. This form is required even if your paycheck is already deposited electronically.

Reimbursement checks are issued every two weeks so depending on the circumstances and timing, it could take up to four weeks to receive your reimbursement.

Forms can be found here: <https://financial.ucsc.edu/pages/forms.aspx>

3. UCSC Credit Cards



ProCards are available to charge routine, low-cost goods and services directly to an account. ProCards can only be used for general supplies, ongoing monthly expenses and non-inventorial equipment. They cannot be used for travel, entertainment or gifts. A separate ProCard is needed for each account. Send the application to your RA upon completion. More details here: <http://purchasing.ucsc.edu/howto/procard/index.html>

Travel & Entertainment Cards allow you to pay for business related travel and entertainment expenses. Unlike the ProCard, it is not account specific and does not directly charge your account. If you expect to travel regularly, this card can provide you with cash advances and keep your business expenses separate from personal expenses. Faculty and staff are eligible for this card if you have a permanent appointment or if you have a post-doctoral position with an appointment of one year or more. You have to pay the balance due on the card from your personal funds each month and then request reimbursement. Initial credit limit is usually \$2,000. More details: http://financial.ucsc.edu/Pages/Travel_CardGuide.aspx

B. Purchasing Goods & Services with CruzBuy

<http://purchasing.ucsc.edu/>

The Purchasing office is responsible for procurements and is your resource for using CruzBuy to purchase goods and services. Use the CruzBuy online purchasing system when you need to purchase supplies, services, inventorial equipment and computers.

IMPORTANT: You MUST use CruzBuy to pay for a service and inventorial equipment.

If you don't have a CruzBuy account, fill out the account setup form on their website and follow the instructions. Telephone and email helpline is available: 459-2311, buy4me@ucsc.edu. When you create a requisition, CruzBuy automatically notifies RAs when it needs funding approval.



NOTE: Before purchasing a computer or printer, please contact Mike Edmonds 459-3165, medmonds@ucsc.edu, division ITS liaison. He must approve all computer and printer purchases to ensure compatibility with campus systems and support.

A requisition must be submitted in CruzBuy and approved BEFORE any expenses are incurred. When you set up a requisition, CruzBuy sends the vendor a purchase order (PO) number. The PO creates an obligation against your account, which you will see on your InfoView reports as a lien or obligation. The vendor then provides the goods or services and submits invoice(s) to accounting.

NOTE: You cannot hire UC employees as independent contractors to do the same type of work as they do in their regular assignment. And, they can only be hired through Academic or Staff HR if they work less than full time.

IMPORTANT: A provider of goods or services must be set up as a vendor in CruzBuy IN ADVANCE, before they provide the service.

C. Miscellaneous Expenses – Direct Pay Form

You can pay out of pocket and request reimbursement for expenses such as books, supplies, memberships, subscriptions and professional dues, as well as non-inventorial equipment if a PO is not available or not accepted by the supplier. Original itemized receipts are required.

This form is also used to pay for scholarships, fellowships, honoraria, participant support and subject payments. For scholarships or fellowships, the fellowship/scholarship worksheet must also be completed. For Honoraria, the Honorarium Employment Status form also needs to be completed. Forms can be found here: <https://financial.ucsc.edu/pages/forms.aspx>

Subject Payments- Contact your RA for details.

D. Travel Reimbursements



Free trip insurance is required through UC before traveling. This insurance is comprehensive and includes: medical care and evacuation, loss of personal property (UC employees only), extraction for political and weather related reasons and more. More information and the simple sign up form can be found here: <http://www.uctrips-insurance.org/>

Detailed travel resources and forms are here: https://financial.ucsc.edu/Pages/Travel_Main.aspx

- 1. Travel Forms** - Always use the most up to date form from the website above to help avoid processing delays. Send it to your RA after completing and signing. A Post Travel form is needed for reimbursements.
- 2. Travel Advances** - Advances are available if you do not have a travel card and would like some expenses to be paid or reimbursed up front, such as airfare, lodging, conference fees or cash for travel expenses. To receive an advance, complete a Travel Advance Request (TAR) and send to your research analyst.
- 3. Group Travel** - Group Travel is an option when 3 or more people are traveling together for the same purpose. One person is designated Group Leader, usually the PI, you pay for all or some of the groups expenses. A TAR for Group Travel must be submitted prior to travel if a cash advance is needed or if UC is paying expenses on behalf of travelers in advance. The group leader retains all itemized receipts for all travelers to obtain reimbursement.

One other way this option is useful is when paying and getting reimbursed for the travel expenses of visitors. Prior to the trip, submit a TAR and include the names of the travelers you are paying for. Pay for travel expenses and submit a Post Travel reimbursement form after all trips are complete.

4. Before You Make Plans - Travel expenses are commonly charged to research awards, however, it is important to make sure that the funding source allows for the trip being taken. A Federal Demonstration Partnership (FDP) grant has more spending flexibility. Consult with your RA or program officer if you have questions. Additionally, there are specific guidelines and federal regulations regarding travel expenses that need to be followed.

5. Making Travel Arrangements

NOTE- US flag carriers must be used whenever possible, **when using federal funds**.

CONNEXXUS is a new UC travel program that features negotiated rates for air travel, hotel accommodations and car rentals. Everything is done through a secure web portal. Options include online booking and full agent assistance. More information:

http://financial.ucsc.edu/Pages/Travel_FirstTimeConnexusUserGuide.aspx

UCLA Travel <http://www.travel.ucla.edu> is a full-service travel agency offering ticketing services for all airlines and some hotels. If you decide to use their service, please complete a TAR form and send it to your RA. After funding approval, accounts payable will assign a trip number and email it to you. Provide this number to book your flight. Airfare, hotel, conference and processing fees are charged directly to your FOAPAL (your research account, see Appendix 1).

Santa Cruz Travel is a local travel agency that can also book reservations for you and charge directly to your FOAPAL, same as UCLA Travel or CONNEXXUS.

http://www.santacruztravel.com/8391570_82857.htm

6. Car Rentals - UCSC has agreements with Enterprise, Hertz and National. Please use one of these companies; they will give you the best deals. Be sure to specify when making a reservation that you are traveling on UC business to receive the discount.

IMPORTANT: UC Policy will only reimburse for an economy or smaller car unless there are extenuating circumstances. An exception to policy is needed. More details here: http://financial.ucsc.edu/Pages/Travel_Appendix_Car.aspx



UCSC does not reimburse for car insurance because it is covered in their agreements with the three approved car rental agencies.

The cost for GPS devices is not reimbursable.

UCSC's **Fleet Services** rents vehicles for UCSC related business. More information can be found here: <http://www2.ucsc.edu/fleets/>

7. After Your Return – Post Travel Reimbursement - A Post Travel Form (PTF) is required for reimbursement of travel expenses and to reconcile Travel Advances (TAR). The PTF is set up with one day per column and one week per page. The Traveler must sign this form. The PI signs authorizing payment if they are not the traveler.

IMPORTANT: Original itemized receipts are required.

Use of **Foreign Travel Per Diem is strongly encouraged**. The per diem covers lodging, food and miscellaneous expenses and **No receipts are required** for these expenses.

Maximum rates vary by location: http://aoprals.state.gov/web920/per_diem.asp

A maximum of \$71 per day, including gratuity, for meals is allowed for **domestic travel**.

While receipts are not required for food costs, the amount you claim should be the actual costs of your meals – there is no domestic per diem. Travel must include an overnight stay for meals to be reimbursable. **Alcohol** is not reimbursable on most funding sources.

NOTE: **Currency Conversions** - Unless you are claiming per diem, please convert foreign currency expenses into U.S. dollars on each receipt or on your Post Travel form. Use this site for currency conversion rates: <http://www.oanda.com/currency/converter>

8. Reimbursing Foreign Nationals - Payments for expense reimbursements, participant support, travel arrangements on behalf of, or fellowships require several pieces of documentation prior to making any reimbursement commitments. Detailed information and forms here: http://financial.ucsc.edu/Pages/Payments_ForeignNationals.aspx - benefits

E. Entertainment Expense Reimbursement



These expenses include any food or drink purchases for any purpose other than during travel.

Meals are only allowable if they are indispensable to the project and they are a necessary and integral part of the business meeting, not a matter of personal preference. Meal expenses are not allowable when two or more employees from the same work location choose to go to lunch together to continue their business as an incidental part of the meal, or when the meeting could have been scheduled during regular working hours.

Note the following maximum allowable costs per meal per individual: Breakfast: \$26; Lunch: \$45; Dinner: \$78; Light Refreshment: \$18. This includes food and beverage, tax and gratuity. Not all funding sources will pay for entertainment costs. Check with your RA if you're not sure.

Use the on-line Entertainment Reimbursement Form (ERF) to establish and get reimbursed for all entertainment related events and expenses. This system was established to help track expenses and ensure related policies are followed. Alcohol cannot be charged to state and federal funds. Log on using your CRUZID GOLD password:

<https://financial.ucsc.edu/Pages/Dashboard.aspx>

III. FINANCIAL TRANSACTION GUIDELINES

A. Recharges

A Recharge is used when one campus unit is charging another for services. Rather than money changing hands, it is handled by transferring an expense within the UCSC accounting system. Two common examples are:

Mail Codes- If you have a lot of mailings, you may want to establish a mail code. The monthly charge is \$6 plus mailing costs. Costs will be charged to your FOAPAL monthly. Email billing@cms.ucsc.edu to set up a mail code.

Copy Cards- The UCSC Copier Program provides copiers at many locations across campus and copies are charged directly to your research FOAPAL. To obtain a copy card email: copy@ucsc.edu. If you have a low copy volume and your department has faculty services, you may be able to sign up to make copies at your department's faculty services office.

B. Expense/Cost Transfers



Most expense transfers will show up in the financial system shortly after processing and approval while transfers of payroll expense (TOPE) only post to the financial system once per month and show up a week or so after the beginning of the month.

Sometimes it is necessary to transfer an expense from one FOAPAL to another (for example, when a FOAPAL was charged in error). In that case, RA's can enter a Transfer of Expense (TOE). Each expense transfer must meet the following audit standards:

- 1) Relate to individual items of expense.
- 2) Refer to a source document in detail sufficient to link the transfer to the original expense.
- 3) Be the same amount as originally recorded or an appropriate portion.
- 4) Have supporting documentation for the purpose of the transfer, not the original charge.
- 5) The expense transfer must be fully explained (who, what, when, where, why):

- Who- written authorization from you is required except for clerical errors
- What was the reason for the transfer? How does the expense fall within the scope of the project?
- When- A sound justification is required for transfers older than 120 days after the original expense
- Where- name and contact information of person processing the transfer
- Why- why was the expense charged to the wrong FOAPAL in the first instance?

Your RA can assist you with developing the required supporting documentation. Payroll expenses can also be moved between FOAPALs, same documentation needed as above.

NOTE: Transfers older than 120 days from the original expense date are only allowed on Contracts and Grants on a case-by-case basis. They are not allowed on Federal and Federal flow-through awards unless exceptional circumstances are well documented.

C. Fund Transfers – Providing Awards & Support

Transfers of funds between FOAPALs are only allowed using the same fund number. One exception is if you provide support to another PI or campus program, an expense share TOE is allowed between research FOAPALs. It must be allowable on a contract and grant account. Contact your RA for assistance.

Awards for travel, research and honoraria are possible to undergraduates, graduate students, post docs and faculty. How they are handled depends on their employment status if any, type of award and if they are at UCSC or another UC campus. Your RA can assist you.

IV. PAYROLL OPTIONS & HIRING SUDENT/STAFF/ACADEMIC POSITIONS



Always keep your department manager aware of your hiring plans. If you are planning to hire someone using your research funds, or are to be paid from them yourself, contact your department manager and RA right away to ensure that the process goes smoothly.

Payroll is processed on a monthly basis. It is important to plan ahead and carefully adhere to deadlines or there could be payment delays.

A. Course Buy Outs - Course Relief

Some awards will cover a portion of a your salary during the academic year, relieving you of a portion of your teaching responsibilities. Course buy-outs need to be specifically budgeted in a grant and your department chair must approve. Please start with your department manager, then your RA to fill out a simple Grant Funded Academic Salary request form.

Course buyouts are calculated at 15% of annual salary plus benefits and paid over 4 months (one quarter). If more than two course buyouts are taken within the same academic year, it will negatively affect your accrual for sabbatical leave, benefits, etc. If an extramural award does not allow for the full 15%, the Dean must grant an exception to policy.

If course relief is cost shared by the Division, your award is only charged the standard Temporary Academic Staffing (TAS) rate of \$7,438 (FY 11-12). The standard TAS rate also applies if course relief is given for a campus service like serving as department chair, academic senate committee member, etc.

B. Summer Salary



Research awards may also include funding to cover summer salary for faculty. Summer salary is paid in addition to your regular wage for up to three months (mid-June through mid-September). If you plan on receiving summer salary from a research fund, contact your RA in April to ensure timely processing. NSF grants only allow for two months of summer salary. One month of summer salary equals 1/9 of your annual salary.

C. Graduate Student Researchers – GSR



It is important to check with your department manager before proceeding. They need to track GSR hires and can check to see if that student is already working. If someone else hires the same GSR and the combined appointments exceed 25%, both PIs will be responsible for a proportionate coverage of GSR fees.

GSR's can work up to 49.99% time during the academic year and full time over the summer, winter and spring breaks. If hired at 25% time or more, you will be charged their cost of tuition plus student fees (GSHIP). Fees do not apply if the student is hired at less than 25% time or during the summer and winter and spring breaks. To hire, complete a GSR Action Form and return to your RA:

http://socialsciences.ucsc.edu/administration/academic_human_resources/forms/GSR-Action-Form.pdf

D. Undergraduates

Keep your department manager informed. Undergraduate student workers are hired through Staff HR. Students can be hired under the work-study program, which covers some of the cost of their wages. Staff HR: 459-2009, <http://shr.ucsc.edu/>. If you need to hire an undergraduate, start with Jose Gaona, 459-4749, jbgaona@ucsc.edu, the Division's Staff Resource Manager.

E. Academic Positions

Campus AHR <http://apo.ucsc.edu/>

In addition to central campus AHR, Social Sciences has AHR staff housed in the Division's central offices. They can assist you with hiring Post Docs and other academic positions. Gillian McGuire 459-2912, gmcguire@ucsc.edu is the Division's AHR Manager. Betsy Tyler 459-5155, ebartlet@ucsc.edu is the Division's AHR Payroll Coordinator.

F. Staff

If your grant allows for hiring support staff, this may be done through either Academic or Staff HR, depending on the type of position. Check with your department manager before proceeding. For a new position, a job description must be developed and a job classification determined and approved before the hiring process can begin. Contact Jose Gaona, 459-4749, jbgaona@ucsc.edu, to help determine the appropriate process (staff or academic).

V. Effort Reporting System - ERS (formerly PAR) Federal Awards Only

The ERS identifies the percentages of time you, or researchers working for you, spent on research and academic activities on Federal awards only. Since faculty and most researchers do not complete time sheets, this is the only audit trail that the campus can provide to auditors to verify that your research effort met or exceeded the percent of time paid.

After the fact effort reporting should equal or exceed the percentage of payroll charged to your award. This report is generated from the EMF office on a quarterly basis. Login and training guides are available at their website: <http://ers.ucsc.edu>

VI. APPENDICIES

Appendix 1 - What is a FOAPAL?

FOAPAL stands for Fund, Organization (or “Org” for short), Account, Program, Activity code, Location. It’s a unique account identifier for each award. In practice, a FOAPAL normally refers to the unique combination of Fund, Org and, if needed, Activity Code that identifies each specific account.

- The **Fund** is a five-digit number designating the source of the funds (State, Federal, foundations, etc)
- The **Org** is a six-digit number that refers to the entity the funds are granted to. Each PI has a unique Org number. In Social Sciences most of them start with with 445, 443, 483 or 485. Exceptions include Startup funds that start with 405, with the last 3 numbers the same as the PI’s Org number.
- The **Account number** is a six-digit number that tracks expenses by type.
- **Program** designates a functional category and is the usually first two digits of the Org (normally you do not need to use this number).
- **Activity Code** is up to a six-digit alphanumeric that is user-defined and is normally used to designate different projects or purposes under the same Fund and Org combination. The first two letters represent the your department.
- **Location** refers to the UC campus – UCSC is 7 (You do not need to use this).

Appendix 2 - Acronyms

AHR	Academic Human Resources
COR	Committee on Research (Academic Senate)
EDP	Award Notification (old acronym meaning Electronic Data Processing)
ERF	Entertainment Reimbursement Form
ERS	Effort Reporting System- Ledger Review
EMF	Extramural Funds
FAST	Financial Administration Services and Transactions Offices (Accounts Payable)
FDP	Federal Demonstration Partnership (or Project)
FIS	Financial Information System (UCSC’s) also called Banner
FOAPAL	<u>F</u> und – <u>O</u> rg – <u>A</u> ccount – <u>P</u> rogram - <u>A</u> ctivity Code - <u>L</u> ocation
FRG	Faculty Research Grants (Academic Senate)
FY	Fiscal Year
GAAP	Generally Accepted Accounting Principles
GSHIP	Graduate Student Health Insurance Plan
GSR	Graduate Student Researcher
ITS	Information Technology Services
JFRG	Junior Faculty Research Grant
ITD	Inception to Date
MOU	Memorandum of Understanding
MRPI	Multi-Campus Research Program Initiative
NCTE	No Cost Time Extension
OSP	Office of Sponsored Projects
PI	Principal Investigator
PO	Purchase Order
RA	Research Analyst
SHR	Staff Human Resources
SRG	Special Research Grants (Academic Senate)
TAR	Travel Advance Request
TOE	Transfer of Expense
TOF	Transfer of Funds
TOPE	Transfer Of Payroll Expense
UCOP	University of California Office of the President