July 17, 2014

TO:        Deans, Directors, & Department Heads

FROM:  Robin Cyr, Associate Vice Chancellor for Research
        Vanessa Peoples, Deputy Director, Office of Sponsored Research

RE:        Important PeopleSoft Implementation Updates

As has recently been communicated, the campus is in the final stretch of the long-awaited and needed transition to PeopleSoft for management of human resource and finance transactions. The transition to PeopleSoft is a complex process and will occur over a period of weeks. Because of this transition, there are a number of issues that principal investigators and research administrators need to be aware of as the October 1st implementation date draws near.

Most importantly, for grants that will end on September 30, 2014, investigators and grant administrators should carefully plan to ensure procurement requests on all grants and contracts (regardless of funding source) are processed, approved and completed through the legacy systems before September 15, 2014. Research teams will continue to work on these projects through September 30th, and some final costs such as subcontract and independent contractor expenses cannot be processed until much later. However, it is highly recommended that investigators and administrators process as much in the legacy systems as possible before September 15, 2014.

Regarding impacts to all research projects, please be aware of the following:

- Plan ahead and be mindful of upcoming capital equipment purchases, cash advance requests, subcontract expenditures (especially foreign subcontracts or small community based partners), travel or start-up costs as the financial and HR/Payroll systems will be shut down and not available between Sept. 15 – Sept. 30. Reference attached HR/Payroll and Finance communications distributed last week for details regarding important cutoff dates (http://ccinfo.unc.edu/go-live/how-to-prepare/)

- Salary source changes with retroactive dates prior to July 1, 2013, must be processed and completed in legacy systems prior to September 15, 2014. These cannot be processed in ConnectCarolina after the system goes live. While retroactive salary source changes with dates for periods of performance after July 1, 2013 can be processed in Connect Carolina, we highly recommend that those also be processed in the legacy systems prior to September 15, 2014.

- HR/Payroll actions such as new hires, planned terminations and FTE changes, etc. cannot have an effective date of September 18-30, 2014.
• In an effort to reduce the number of accounts that will need to be converted/transferred to the new system, please make every effort to reconcile and close out as many accounts as possible. System implementations are a challenge for any institution and transferring accounts and data that have ended but not closed out and inactivated will make the process more cumbersome.

• Between Sept. 15 and December, you will have no capability of providing non-service, tuition, or fee awards to students. In order for students to be eligible for in-state and tuition remission awards in Starlight, the TOTAL FALL STIPEND must show up in Starlight by September 15th. (http://ccinfo.unc.edu/go-live/how-to-prepare/)

• After close of business Sept. 16 OSR will not be able to create new accounts, add funding to existing accounts, process budget revisions or affect any other change that would involve the financial or HR/Payroll systems. This includes no cost extensions, changes to key personnel or PIs. While prior approval requests requiring agency approval can be submitted for agency review, the system will not be updated until after go-live.

• During the implementation period the research community and OSR will be able to initiate and route proposals in RAMSeS (with the exception of 5pm, Sept. 19 through 8am, Sept. 22), respond to just in time (JIT) requests, review and approve effort reports in eCRT that do not require payroll adjustments, and negotiate agreements and subawards.

While the next few months will be challenging for all of us, the increased functionality and efficiencies that we will gain will be well worth the effort. Communication and teamwork will help us ensure that we have a smooth transition.