Jason Berlow: Hi. Thank you. We’re really glad to have everyone here today. This is our first monthly training that we’ll be having from today going forward until next year and beyond. And today, we’re going to be talking about the finance enterprise process and some of the exciting work we’ve been working on for the field. Then, we’re going to review some upcoming trainings that you can see for the next few months that are going to address specific feedback that was provided during our interviews from AOs, ACOSs, budget analysts, et cetera.   
  
Then, we’re going to talk about one of my most favorite topics, the research appropriation and what makes us different because we’re a little different and not everyone understands why we’re different. So, it’s the hope that you can share these slides at your stations with the PIs and your fiscal and anyone else to understand why the research appropriation’s different. Then we’re going to talk about why these factors impact how we do our work by obligating funding and conducting research and lead into carryover, which is everyone’s favorite topic that we talk about a lot. Then you’re going to hear from Tony Laracuente, talking about some items about closing FY 22, understanding the key actions to complete for Q3 and Q4 to mitigate your carryover risk. And then we’re going to talk a little bit about the FY 23 budget submission and give you some information about that.   
  
And then there will be an opportunity for Q and A. So for Q and A, we have the whole team here. We have myself, Tony Laracuente, Matt Verna, the director of finance, John Verwiel, the deputy director, and Kari Points, the AO for research at Iowa City. So, with that, we’ll get into it.   
  
So, in the first module, we’re going to talk about the ORD’s finance process initiative. And I’ve been the lead of this initiative. And this is one of nine initiatives on the research enterprise, which is a big priority of the CRADO here at research, Rachel Ramoni. And more specifically, we’re going to be talking about the financial process. And then, we’re going to preview some upcoming trainings that are designed to address your specific feedback.   
  
The research enterprise, in broad terms, is a set of people, tools, and processes committed to the whole VA approach for supporting research, clinicians, and veterans. And at the beginning of this fiscal year, we started nine work streams commenced to create a streamlined and collaborative approach to improve our infrastructure and processes.   
  
As part of the overall effort, the finance initiative will provide ORD stakeholders with a greater...so for the finance initiative in ORD, the goal is to provide a more streamline view for how we allocate, obligate, and expend our dollars in a research enterprise. And the goal here is to reduce carryover, but not just reducing carryover because we work in budget. Well, you don’t all work in budget. It’s one thing you do, but it’s all we do. It’s to help you. The goal is to form more research on behalf of veterans, and we’ll show some of the impacts later.   
  
So these efforts are building on some lessons learned through FY 21, our carryover reduction projects. We had our after actions meeting on February 28, and then also interviews with AOs, budget analysts, and stakeholders. And we have a whole large group of members from both VACO and the field in our group that we meet weekly to talk about this process and work through all of our work streams. And if you’re interested in participating, we’ll be starting the process again in FY 24, trying to add new goals. So there will be an opportunity if you’re interested in participating because the fields input is so important.   
  
Our objectives for the field are three things, to improve station’s ability to track allocations, obligations, expenditures, and non-obligated balances. And then also our goal is to provide clear policies and procedures to obligate funding. And when we say that, we’re working to create not SOPs, per se, but best practices because we realize every station’s different. So we’re not going to create strict procedures. More we’re looking to create best practices to help you do your jobs. And then we want to establish clear lines of communications with key field stakeholders. And one of those things that we’re doing today and for these clear lines is establishing these trainings.   
  
One thing from our interviews that we learned is that as an AO or an ACOS, your job has a lot of responsibilities. And finance is just one of them. So, we realize that we need to provide clear guidance and expectations of the tools to allow you to be more effective in financial management. So, here’s just a list of some of your roles. Now, don’t think this is a comprehensive list of what you do, but we know that financial management obviously is very important but you have to do regulatory and compliance management, oversee equipment, and all those other things that are involved. So, we thought these two quotes from different AOs and ACOS’s were very valuable and an insight into how individuals do their jobs. So, you can just read these here. Moving to the next slide.   
  
At our meetings with our finance group and from the interviews, we created this list, and this list came from the interviews. This is what in the interviews was reported about the different items and systems you have to use in your jobs every day. And it can be overwhelming to have someone coming new in the job when someone tells you, you need to get these access and these accesses because a lot of these systems, IFCAP, FMS, and VistA are quite dated so it’s a lot. So, the goal of our training is not per se to teach you how to use these systems, but to teach you how to utilize these systems so that you can use these systems to improve your performance and be able to track funding. Basically we’re looking at providing more examples to show you how to use it. So, if we have a training on VSSC, we’re going to show you how to export your SOA and pull different reports and how to use pivots and such from that. All right, moving to the next slide.   
  
Based on the feedback from you and other members in the field, we’re going to start a revamp training program to focus on common financial tasks that you are responsible for . And the most exciting part is the program’s starting right now, today, in a few short minutes. You’re already in the right place. To ensure you and your colleagues have a common point to reference, our office is working with stations to document best practices that other sites can choose. And when we’re documenting them, our initiative team has field members and VACO members, so we’re getting input from all the right areas. We welcome any feedback on topics, trainings, or material so after this training, feel free to email us, put it in the survey that comes after, and any other method to contact us, let us know how we can support you.   
  
We have trainings beyond June 15. We’re looking to have them generally the third week, third to fourth week, of the month. So, training today’s on the initiative update and ORD appropriation structure and closing FY 22. So the next training is to be May 18. That’s going to be on managing salaries at your VA because we’ve heard that tracking salaries is such a large issue. So, Kari Points and Tony Laracuente are going to be talking about pay period analysis, protecting payroll, rejects and troubleshooting the wrong cause center. I’m sure that’s a common thing. We’ve seen multiple emails about that before and managing cost-conscientious programs and fiscal years.   
  
Then in June, there’s going to be a training on VSSC and reading your status of allowance, which is something we learned a lot about in our project last fiscal year, reducing carryover. So, we’re going to start that. And then, just a preview of coming up, in July, we’ll have a training on closing the fiscal year. And then the August training will be about starting up the fiscal year, and then there’ll be a training on research 101. And then after that, the trainings are going to be more thematic related to how the year progresses to track all the items and use those systems. The planning and development of those is still in progress. But for the next three months, May and June, those are the trainings that are coming up.   
  
ORD’s appropriation structure, this is an area that I’m quite familiar with. I’m not sure if you’re all aware, in my previous role, I worked for the department so I worked on the budget submissions with the department and the appropriations process, the congressional justifications, et cetera, a lot of the work that I still do here today, and I got really familiar with Allen Dunlow. I worked with him because I was the research POC at the department level so I helped Allen with the budget and all those mechanics. We’re going to have you gain a better understanding of what makes the research appropriation different. Two things, it’s subject to continuing resolution, which the rest of the VA isn’t, and two year funding. The second thing is to understand how these two factors impact our ability to conduct research and lead to carryover.   
  
What is different about the VA research appropriation and the clinical appropriations? And when I say clinical appropriation, I’m talking about medical services, support and compliance, facilities, community care, et cetera. So, the clinical appropriations are under an advance appropriation. And an advance appropriation is quite rare in government, actually. Only a few different agencies have this ability. And the reason there’s an advance appropriation is because when the government was always starting under a CR, they didn’t want VHA clinical care, medical care, treatment for veterans to be impacted by a government shutdown. So that’s why they have an advance appropriation. So what happens in an advance appropriation is, for example, the appropriations act just passed a few weeks ago on March 15, and that appropriation act provided an advance appropriation for all those appropriations starting in FY 23. Now, that being said, you cannot obligate that money until September 1, 2022, or FY 23, and that will require what’s called an OMB apportionment which OMB would sign in order to start obligating those funds.   
  
Now, research is under what’s called an annual appropriation. And that means the appropriation act must be passed by October 1 of each year in order to receive funding. Well, you might have a question now. Wait a second. We don’t have an appropriation by October 1. There’s always a CR. That’s why we \_\_\_\_\_ [00:14:39] later, and we’re going to get to that in the next section. Now, an advance appropriation is not subject to a CR, in the absence of appropriation acts. So they’ll still have authority to obligate as long as OMB signs those apportionments, which is going to happen because it’s more of an administrative task. It will happen. So, October 1, they have a full year of funding. They can start obligating funding.   
  
But over here in research, September 29, September 30, we haven’t heard anything. The government’s getting close to shut down. Everyone’s getting worried so Congress is going to pass a short-term legislation to fund the operations, the government operations, for a number of days at a pro-rata rate. Now the problem with CRs is it’s supposed to be for a short period. Well, another question might be well how is till March a short period? Well, it’s because Congress, the congressional appropriations process, has a lot of issues, obviously, and passing a government appropriations act is a challenge. So it takes some time. We operate under CRs. We had four CRs this year, and we didn’t get enactment until March, which is very late. The last time this happened was in FY 18, also in March, and we had a lot of carryover.   
  
All right. The last thing that makes us different is that much of the clinical appropriation is funded only for a one year POA with a small percentage as a two year. So, for example, medical services is about 60 to $70 billion appropriation and maybe $2 billion of it is two year. But if you look at the research appropriation, our entire appropriation is two year. And it seems like from what I’ve heard from others, our appropriation’s been two year for a very long time. And the original intent of that was probably because of the long time it takes for research to move and get funded due to the IRB process, regulatory, et cetera.   
  
So, we will have carryover. And carryover refers to the funds that are not used in the first year of their appropriation or what we call the period of availability. And they must be carried over to the second year. And this can lead to carryover including rescissions that must be minimized. And in FY 22, due to your hard work, luckily we did not have a rescission. But as you remember, in FY 20 and 21, we did. And I’ll talk about that I believe on the next slide. Okay.   
  
What are the advantages and disadvantages of a two year appropriation? The advantages are funds are appropriated with a two year period of availability so we have more time to do what we need to do. For example, we got a very late enactment so we’re going to have some carryover now. If we didn’t, we would risk lapsing a large amount of funding at the end of the year, and that’s like what I said here, late enactment of the appropriation due to the continuing resolution allows us more time to obligate. The disadvantage is it creates a perception that carryover into year two of the period of availability is not a problem. And this is a problem. It can eventually lead to less research.   
  
Hold on. Let me just close my Teams. One second. Okay. I’m going to stop sharing my screen. All right. You can see it again, right, James?

James Cunneen: Yeah. We’re good.

Jason Berlow: Okay. When you have a Teams meeting, it minimizes the chats but not when it’s in WebEx. So the other issue back to here is it creates a large variability in carryover cost for research sites. And this is something we talked about in our training on the 28th I believe. So we set a goal of carryover of 4%. But this was only achieved by 20% of 94 stations with 32% of stations having carryover above 30%. Six stations did not obligate any funding in 2021. So the issue with carryover is it can kind of mask execution problems at stations because they’re busy obligating their prior year first. It’s a first in, first out mentality. So, it makes it very difficult to understand the execution issues and be able to track the funding.   
  
The last thing is rescissions. And a rescission is a tool that Congress uses in an appropriations act. For example, say that they had $100 million for the whole government to fund. So, they’ll say at the top of the bill, we’re funding this program with $100 million. But in a lower section, a provision, they’ll take back money from the prior year, and that will be to make everything balance because they have to fit in their discretionary caps that are set in law. So, the problem was in FY 20, we had a $50 million rescission and in FY 21, we had a $20 million rescission. And this led to less medical research performed on behalf of veterans because we work with the -- when it happens, if you remember, the money’s all sitting in the field. We don’t like to pull out money we don’t have to, but in a rescission, we do. So we had to work with the sites to find that money and pull out that was already allocated for certain projects. And the money wasn’t replaced one for one. It was just replaced with current year funding.   
  
The next few slides are going to be our trip. You can consider it a movie, a stressful movie, a scary movie, through the fiscal year. And we’re going to be dividing everything into prior year and current year. And often we get confused between prior year and current year, so I’d really like to provide the fund and the period of availability when I reference them so that we can reference all that. So, ORD’s carryover at the start of FY 22 was $98.9 million, which was a lot lower than the previous year. When we started this year, our carryover target was 4%, but like we said in the previous slide, we have room for improvement. Through the carryover reduction process exercise and the strong support of the field stations, we aggressively pursued a strategy to obligate the majority of carryover by the end of first quarter, which led to no rescission in FY 22.   
  
The funding for current year was limited in the initial target allowance, ITA, because we had a pro-rata amount and had four separate CRs, and this negatively impacted the ability to obligate contracts and hire. We often got messages from the field saying that their payroll’s about to lock up, especially right when we were getting to the end of that CR period in December, February, and March. But unfortunately, that’s really how the CR is supposed to operate. It’s supposed to give you just that minimum amount of funding to keep the lights on, not to be able to do new work and to be able to have all your funding for the year. So this means in Q3 and 4, once we receive enactment, you need to talk to your PIs and have your contracts queued up. We don’t want to miss the opportunity to maximize research for veterans.  
  
FY 22 midyear enactment and focusing on current year funds. At midyear, the majority of the prior year funding was obligated or swept by January. Now, we’re still closely monitoring those balances to ensure that any remaining balances or de-obligations, which are really important because if you have a major de-obligation very late in the year, it will be really hard to find somewhere to obligate that money with all the contracting deadlines, et cetera.   
  
The 2022 enactment came very late, March 15. And we had $87 million over the CR amount. This late enactment represents a lost opportunity to fund research earlier in the fiscal year. All research stations will now need to aggressively obligate funding with only five to six months to avoid larger carryover and exceed that 4% target, which is going to be extremely difficult. These funds now need to be obligated and you’re going to face all these challenges, hiring, contracting, et cetera. So this is our appropriations language. If you ever want to find the bill, I’ll share it after the meeting or you can just email me. If you go to congress.gov and go to appropriations, you’re going to go in and find our appropriation.   
  
So this is what our appropriation looks like every year. And I just wanted to explain the different components. This first section here is our authority to operate. It's Title 73 of US Code 7303. Now you need an authorization and an appropriation. And that's the two committees of Congress. You have the authorizing committees and you have the appropriations committees, and they do different things. The authorizing committees authorized the programs for the government for what the government will do. And the appropriations committee set the budgets and set the funding. Because like the constitution says, all appropriations bills originate from Congress. So they're the ones who set the funding levels. The administration, the president, will submit a budget of what they think that they want the budget to be, and then Congress will provide their views and the House and Senate versions.   
  
So right here, you might wonder where does it say we have two-year funding. The amount of time you have to obligate your money is always contained in their appropriations act. So it says right here, $882 million, which is your FY 22 enactment, plus reimbursement shall remain until September 30th, 2023. So we have until that date to obligate that funding. So here's some key takeaways. Here's our flexibility. And then if you'll want to learn more about our authorization, I'm not going to click the link here, but it'll take you here to the link and you can read all about our authorization.   
  
Okay. Closing the fiscal year. And we're going to talk more about this and Tony in just a minute. So for the prior year we're monitoring those balances, not just in the 0161A1, but also the 0161R1 because we need to obligate all those fundings. Otherwise we're going to lapse them, and it's going to show that it looks negatively on our reporting and all those things need to address prior to 9/30.   
  
And then you in the field, you're pretty busy because you're working to obligate all your current year to get below that 4% carryover target. And that target is just...if you exceed it, we're not looking to punish anyone. We're just looking…that's just the target we have, which shows an overall ability of your station to execute. So if you're above 4%, we really need to have eyes on you, especially if you're getting way above 4%, otherwise we're really at risk of your overall execution of being able to obligate the funds. And the larger carryovers impact ORD’s budget requests and lead to rescissions and reduce the amount of research that can be funded. And like I said before, it's $70 million that we've not obligated from FY 20 and FY 21 due to rescission. So we're looking to avoid that going into FY 23.   
  
So now I'm going to hand the baton to Tony, and you'll hear from me in a second when we talk about the FY 23 budget request. And Tony I'll run the slides.

Tony Laracuente: Thank you, Mr. Berlow. And thank you for this presentation. So, we want to talk about closing out FY 22 and preparing for FY 23. And as Mr. Bellow had mentioned, we really appreciate the work that has gone on to minimize the 21/22 funding balances. Really, it's been remarkable to see the number drop tremendously from October to January and to now, but we still have some work to do so we'll talk a little bit about that. Jason, go ahead and let's go to the next slide.   
  
We need to spend the remaining prior year funds that that are not committed. And that should have been done by 4/1. This past week, I sent out the latest spreadsheet with the balances. And we're really going to take a look at it on 4/10 and provide back to you that if you don't have a spending plan already in place, i.e. that we've talked to you about your contracts, and mainly the contracts, that we're really going to ask for a spend plan. And some stations have increased their balances. And we do know that there's de-obligations going on with prior year contracts, 1358s and things along those lines. And we do understand that there will be a time needed to go ahead and re-obligate that or do cost transfers as needed. However, we have noted as well that there are purchase cards that are still accrued or have been pending a final resolution that need to get done or that you had to move those purchase card orders to current year money. We don't want those lingering through the rest of the year.   
  
Next week you will have the quarter two RAFT report due on 4/15. You’ll be working with your investigators to spend current year funds. This is for all current year money. We know that you have obligations that are planned for Q3 and Q4, and we know that that's going to happen. However, you also need to look at your PMOs and you need to return funds that are not going to be obligated this year back to ORD so they can be repurposed this year for other needs that the programs have.   
  
We want you to proactively manage undelivered orders. Not just purchase cards, but you also have a lot of contracts that have lingered out, pieces of equipment that have lingered out. And we do know that supply chain problems are causing delivery problems as well. But we need to manage that so we can have an idea if these things are going to be delivered or not, and of course you can always ask for help in advance. It’s really critical that you talk to us, you talk to the budget analysts that are assigned to each of the programs, you talk to Mr. Berlow or even the service program managers so they know, they're aware, of what's going on. So next slide please.  
  
Thank you. We talked about the quarter two RAFT report, and we want you to identify -- the whole purpose is to identify projects with zero to less than 30% expenditures. This quarter two report is really pivotal. It gives you an idea, not us but really you, an idea of projects that aren’t spending. Low ratio of expenditures to funding indicates that there might be a potential carryover in FY 23. And so we want you to work with your investigators to spend those current year funds. Be proactive, and again, as we mentioned the project modification forms, submit them. Now those project modification forms are due to CSR, HSR, and Rehab R&D on April 29, which is a Friday. For BLR&D, they’ve extended it through July 15, but you really need to work with the ORD services to address those PMOs and instructing the PIs that funding will be available to complete their project. It’s just that it’s being redistributed out to other years and out years.   
  
And then, what ORD and the Office of Finance will be doing is they will be providing the data to the services, the program and services, by service ID and by site for them to review. They’re going to look at it in terms of under-executing projects, and they might be contacting you. They might be contacting your PI. But really, the whole goal is to determine if funds need to be pulled back and reprogrammed. One other things is that those dollars by service ID will be rolled up and they’ll be compared to the current year obligation rates from VSSC. Next slide, please.  
  
We know we’ve all been there where the PI says I don’t want to send money back because I’m never going to see it again and they have concerns about that they’re never going to be able to finish their project because they don’t have enough money, that ORD is going to take the money and never give it back to them. That’s just not true. The PMO action is your document. It’s your contract. And it’s not a reduction in budget. It just says that I need to redo this because I’ve had delays of contracting, HR hires, can’t buy the supplies because of supply chain issues, and so forth. And so this is truly a way to document it and get it out that you want to finish this project a little bit later. You need more time.   
  
ORD really does want the project to be completed. We’re funding you. We’re funding the investigators. And we want to get that project done. We want -- reducing previously approved budgets is not feasible. We know that studies, that investigators spend a lot of time putting the budgets together. And we really need to make sure that we honor that commitment to the investigator in terms of the dollars. And then supporting that project until it’s done is really critical because we want to get those research studies out completed. We want to get the findings out. We want to make sure they’re published. And of course, we want to make sure that this does positively impact veterans’ health. So please really talk to your PIs about the PMOs and make sure that they understand this is not a negative. It’s really actually helping them in the long run and helping the research program. I believe I’m turning this back over to you, Jason, for the next slide.

Jason Berlow: Yes. Thanks Tony. With that slide Tony just showed, I think it’s really important...we’ve gotten a lot of feedback that with these slides we present, you often share them with your facilities. So provide us feedback for anything we can put in here that helps add some muscle to what we’re trying to do, for example, that previous slide.   
  
This chart I wanted to share is a review of our appropriations and what we requested, enacted, and the end of year carryover. We were just enacted on March 15, and what I should have added here was the dates that they were enacted so maybe when I send this back out, I’ll put that back in because that’s helpful information. So we were enacted in March and our request and our enactment was the same. But it’s generally not like that. Generally, if you look through the years, our request is actually lower than our actual enacted, which means Congress was very favorable of our program, which they are, and they actually provided more funding.   
  
The one problem with that is that it can lead to higher carryover. And the biggest example I like to highlight now is FY 18 because it’s pretty much the same situation. We were also enacted in March. Our request was 640 and we got about $80 million more. So it’s basically the same when we’re operating on the CR. Our end of year carryover was $145 million. Now, in FY 22, we were operating under an annualized CR till March of $787 million. And then in March, we finally got our full year enactment of $87 million. And now, we have a shorter period of the year to execute and spend more money. And you don’t have your full year funding yet. We’re working with the department and VHA finance to get you your full year funding, but it’s not in yet because we don’t have that apportionment, which is a required item to be able to push that money out.   
  
So the key takeaway here is between FY 17 and FY 21, ORD actually received larger appropriations than requested, which is rather unusual. But it just notes that our program is very popular among Congress because of its important impact on veterans. So that’s why it makes it critical here in VACO and in the field to prepare for the event for the larger enactment later in the fiscal year so that you know that you’ll have more money coming down and you’re aware that we obligated...I believe about 70% of the funding that we received is obligated in the field and ORD.   
  
The FY 23 budget request came out last Monday, and if you want to read more about it, you can click this link and it’ll take you to the VA website. And this is the whole VHA volume. the whole volume of the budget. It's about 1000 pages. But if you go to page 569, you can see the ORD budget and read more about it. But the 2023 requests includes increases in a few key areas to make you aware of, military environmental exposure, which is one of the key priorities of this administration; traumatic brain injury, another key priority; and cancer precision oncology, which is big because the administration, President Biden, relaunched the Cancer Moonshot 2.0 from the previous Obama administration. So now they’re looking to improve, increase cancer and precision oncology. So if you have any of these PIs in your facilities that have expertise in these areas, you definitely should work on proposals of those areas because that’s what’s coming up.   
  
And then work with your ORD service to preplan how stations could support these activities and plan contingencies if Congress funds at a higher level than the request, which we have a very -- we’re fairly confident that our final enactment in FY 22 will be higher than the request due to the past history that they just showed in the slide before. That’s all we have here. So, now we’ll jump into questions. We still have a good amount of time left. So, I guess I’m going to stop sharing now.

Moderator: We’re going to give it over to Brandon in just a second. He’ll pull up the questions we’ll \_\_\_\_\_ [00:39:56].

Jason Berlow: Do you want to take that one, Tony?

Tony Laracuente: Yeah, Jason, read the question. So IPPS can also be used for vendor lookup to see if a vendor is in the VA system for purchasing, contracting. Yes, and thank you. That is correct. We were just providing examples, but yes, we’ll definitely go through that during the training so thank you for the comment.

Jason Berlow: Why is appropriation on 0161M1? So that’s the fund, 0161A1. Can the person who asked the question clarify a little more?

Moderator: So their chat is turned off but if that person can put any follow up in the Q and A, we’ll get it to you.

Jason Berlow: Okay, that’s fine. All right.

Tony Laracuente: Jason, I’ll take this one. Can we please have the due dates for PMOs for each program so we can plan execution of them accordingly? Yes. So, PMOs for redistributions are due April 29 for Rehab R&D, HSR&D, and Clinical Sciences. PMOs for redistribution for BLR&D are due July 15.   
  
Jason, I’ll take this one, too. Can the PMO be based on the ITA since we do not have the funding on station yet? Yes. So what will happen with your RAFT report is that you will be providing obligations based on what the intent or what is in the pink sheet for FY 22, so yes, your PMO should be based on whatever the pink sheet is, which is whatever the ITA is based on, so yes.

Jason Berlow: I’ll take this one. I would say probably a few weeks. Our automatic apportionment ends April 15. So if we don’t have our final apportionment by then, they’re going to have to give us another 30-day apportionment. And we’re working on it, actually. That chat, the IM, that appeared on my screen was me trying to get a status for you guys. And I realize it’s very frustrating because what we’re trying to convey is that the longer this takes for you to get your full year funding, is going to have a direct correlation to the carryover that you have because we’re up against all these contracting deadlines. Go ahead, you want to say something, Travis? Or John?

Unidentified Male: We sent out the CC 101 tons and the ITA bounds. I was shooting for mid-April, but as soon as it gets uploaded into FMS, it’s going to be going the next day. So it’s just waiting for things to trickle through VACO to hit our appropriation. So mid-April is what I was shooting for so hopefully.

Jason Berlow: We’ll keep you posted. John, you want to take this one? Is the iFAMS fiscal software rollout still happening?

John Verwiel: It is. We’re looking at 2024. They’re doing configuration. The big thing for our program office is to track each station whether or not they’re on this platform because it’s going to change the way we upload the data or the allocation. We haven’t figured out if you guys are like a midyear roll over, are we going do a switcharoo and switch from FMS to iFAMS. These are some of the questions we got to figure out. iFAMS is going to change the way we do things, obviously, and we’ll have to have two systems simultaneously, legacy, which is FMS, and then doing a switch to iFAMS. And it’s going to be an automated upload process that we’re working on. And more to follow.

Jason Berlow: How do we get a distribution list for future trainings? Well, right now, a few things. First, we’re running these trainings through OPPR&E so when we request trainings we have it distributed to the ACOS and AO list, and then I’m also forwarding it to the finance POC list. Now, we know that list isn’t comprehensive, and we’re still reviewing the survey data that you submitted February or March. So if there’s another list we’re missing, please let us know so we can also include you. And we can send a link after the training, but OPPR&E has a link of all the upcoming trainings so if you just jump on that, add that URL to your favorites, you can also see the trainings there. I believe that was the last question.   
  
Okay, there is another question. Are you going to put that one on the screen? Are steps being taken to align the needed efforts of other local VISN level services, fiscal, contracting with our mission to earnestly meet spending obligation charges? This seems like a problem that needs to be worked both internally and...to affect maximum results.   
  
That’s a good question, actually, and that takes us back to our enterprise process. And we’re working on a process to educate other stakeholders, like you mentioned fiscal contracting center on our mission and how we’re a little different. That’s a process we’re going to be working on later this summer. But it’s definitely something that we need to help others inform. Because the way I see it, I think us here at VACO have a lot of...experience similar issues to you in the field because we also have our fiscal, the main CFO for VHA, and then we’re here on our own doing the research thing. So I feel like we’re always trying to explain why we’re important when we’re just asking for some of the most basic things to be able to execute our job and mission effectively.   
  
Will projects be extended if requested in the new PMO, the new end date 2023 instead of 2022? I saw Tony dropped. Matt or John, do you want to answer that question?

Kari Points: This is Kari. I can help a little bit.

Jason Berlow: Okay, perfect.

Kari Points: In the project modification, if you’re going to reallocate and extend, then you want to request basically a no-cost extension because you’re not asking for additional funds, but you’re asking for the date to be extended. So it’s a duplication on that project, or the PMO so you can do both on it. And I have done that before with a couple PMOs that I requested for investigators so that they can have a no-cost extension but also reallocation of the funds.

Matt Verna: Hey, thanks, Kari. This is Matt Verna. I’ll also just a side note question to piggyback on that is the decision to approve that PMO, to approve the extension, falls back on the programs, does it not?

Kari Points: Yes. So that would be contingent on them approving the no-cost extension so you still have to have an inclination on what you’re going to be doing in that timeline. So you can request it. It just has to be, like Matt said, approved.

Matt Verna: Thanks, Kari.

Jason Berlow: I’ll let Kari answer this one too. Is PMO needed to switch supply to salary?

Kari Points: I would say no because your overall budget is not changing, and when the funds come in on that TVI, you can move them to salary or all other based on the needs of the investigator to complete that project.

Jason Berlow: Could we include branch management as a topic on the form? I’ll start this question, and then Kari and others will chime in. I think the term grants is used a little loosely here in ORD. We don’t have grant making authority so I think when someone’s referring to a grant, that they’re referring to ORD intramurally funded research project, which is not a grant. It’s just funding provided to execute a research merit. So, if the person with the question wants to elaborate a little more, but I think they mean how to manage the project, the salary, and all the different aspects of the budget for it to operate, which I think it will definitely be included in our training. Kari, do you want to add anything here?

Kari Points: I disagree, if they’re talking about the actual project management after funding, then yes, we’ll be covering that. And we’re going to do both at the project level, how you should be managing the funds but also bringing it all up under the SOA that the programmatic level as well so we hope to cover it all. Just a little concerned they might be asking about like actually submission of grants and that's not something we've talked about, but I know that there's a new list serve out for that for people to collaborate and talk about. So, if that is what they're asking, they can clarify that.

Jason Berlow: And Kari, that would be applying for grants from other government agencies, NIH or something, correct?

Kari Points: Well, we marry the submissions and send the grants to the VA. I think they're talking about if the financial aspect, once a merit review is funded and we'll go through all of that, how to process from initial allocation to your expenditure reports and how to balance. But if this is talking about the actual submission, the pre-award process, we were not planning on discussing that right now.

Jason Berlow: Someone here just typed in here, they said, I believe they may want pre-award guidance.

Kari Points: Yeah. So if they want pre-award guidance, that's something we'll have to talk about because that's not necessarily a finance item, but I do know just even from my site, the merit review awards can be complex and there's a lot to know. So that might be something that we can at least bring to bring forward as a training option.

Jason Berlow: Okay. I see one more question, but if anybody has more questions, we have some more time so feel free to submit. Kari, I think you'll answer this one. If a PI needs to submit more than one PMO in the subsequent years, in part due to the research program having to spend PY last year without carryover, will this be looked upon unfavorably? And maybe Matt and John also.

Kari Points: So I would recommend if you have questions about how the PMO is written and if they're going to be extending out for quite a bit, I would recommend that the PI talks to the program officer before submission to kind of gauge how they would feel about that submission because it's ultimately their decision whether or not it will be approved as a service lens. So that'd be my recommendation. If it seems like if they haven't spent anything and you're going to be asking for the entire amount being reallocated, there'll be some explaining to do there as to why the funds haven't been spent yet, which can be maybe there's hiring or contract delays and all that, but you can always reach out ahead of time with submission and talk to the program officers.

Jason Berlow: It looks like that's the last question. Oh, we have one more question. I'll wait for you to put on the screen, Brandon. Oh, that one's old. The question was about, post-award not the submission process. We answered it. Okay. Thank you.   
  
If you have more questions, feel free to reach out to us. You know how to contact us, and we'll be seeing you May 18th. Just for your awareness, I will be on the second part of my parental leave May and June. We had a baby in January so I'll be out, but you're in good hands with John and Matt and Tony and Kari and the rest of the team. But I'll be here the full remainder month of April if you need to contact me.

Moderator: All right. Well, thank you, Jason. And thank you all you attendees. As we mentioned at the beginning, there will be a quick survey to fill out after this. We would appreciate if you just took the time to do so. Thank you, everybody.

Jason Berlow: Thank you, everybody. Have a great day.