Q: Will I receive daily notifications?  
A: Yes. Project Managers with Oracle Financials will receive a daily notification when a cost transfer has been completed on their awards/projects before the 10 pm cut-off time. In this way, PI/Ms will receive an email notification for an extended period of time.

Q: Can I request to turn off daily notifications?  
A: No. An unclear/beneficial date range, which could include a range of cost transfers on their awards/projects. As part of an enhancement to the report, we are exploring notification schedule options, such as weekly, monthly, or quarterly.

Q: Can the notifications be routed to Fund Managers?  
A: Fund Managers will be included in the same email notification.

Q: Where can I go to pull a report to monitor cost transfer activity as my awards?  
A: Visit reports.ucsd.edu and select Post Award Financials > Post Award Financials Search. Then select Post Award Financials Search and follow the instructions on the web page.

Q: Which policy requires that I receive notification?  
A: The specific guidance derives from the federal government on cost transfers in the NIH Grants Policy Manual under section 7.5 (Cost Transfers to NIH Grants by Recipients, Consortium Participants, or Contractors) and criteria for making expenditure adjustments. Section 3.B.4 of this policy states that cost transfers to NIH grants by recipients, consortium participants, or contractors under grants that represent corrections of clerical or bookkeeping errors should be supported by other documentary evidence that explains how the error occurred and a certification of the correctness of the new expenditure. This policy prohibits transfers that would result in a new expenditure inadvertently charged to incorrect account/fund (emphasis added). Therefore, transfers of costs from one project to another or from one project to the investigator, department head, or other academic official. For transfers processed electronically or using on-line systems, the certification and approval signatures must include that of the principal investigator, department head, or other academic official. If such errors occur, recipients are encouraged to evaluate the need for improvements and to make whatever improvements are deemed necessary to prevent recurrence.

Q: What if I do not receive a notification?  
A: PIs and Project Managers will only receive a notification when a cost transfer is completed on their awards/projects before the 10 pm cut-off time. It is possible that PI/Ms will not receive an email notification for an extended period of time.

Q: How do I ensure that I receive notification?  
A: To meet policy requirements as referenced below, starting on the evening of February 19th, 2021 PI/PMs will receive a catch-up report of all transfers completed on their awards/projects after the 10 pm cut-off time. This catch-up report will provide a one-time batch notification, after which email notifications will be sent daily when a cost transfer is completed.

We extend our sincere appreciation and gratitude to the many faculty and staff working with us in making sure our policies and requirements and enhance the cost transfer process, reports, and notifications.

Contacts & Questions

Q: How do I contact the Budget Finance Support team?  
A: Submit a ticket via the Budget Finance Services & Support ticket submission form to request the appropriate role(s). For more information on the cost transfer reports watch the webinar. For technical support visit the GL Inquiry and Reporting Role form to request the appropriate role(s).

Q: What do I do if I notice a cost transfer on my award?  
A: The recipient should have systems in place to detect such errors within a reasonable time frame; untimely discovery of errors could be an indication of poor internal controls. Recipients must maintain documentation of cost transfers, pursuant to 45 CFR 75.364, and must make it available for audit or other review (see Requirements-Monitoring-Record Retention and Access).

Q: Can the notifications be routed to Fund Managers?  
A: Yes. Fund Managers will be included in the same email notification.

Q: Who may I contact with questions?  
A: For questions or inquiries related to Oracle Cost Transfers, our team may be reached by submitting a ticket. For technical support visit the GL Inquiry and Reporting Role form to request the appropriate role(s).

Q: Who created this document?  
A: The Budget Finance Support team created this document. The Budget Finance Support team is working with us to meet UC policy requirements and enhance the cost transfer process, reports, and notifications.

Q: Is this report required?  
A: Yes. This notification is a requirement of the PI's wet signature. If such errors occur, recipients are encouraged to evaluate the need for improvements and to make whatever improvements are deemed necessary to prevent recurrence.