Core Facilities Brown Bag #10
Friday, March 4, 2016, 12-1 PM
Meeting Notes

UBI/External Revenue Tracking Summary: NU is generating an increasing portion of its external revenue from for-profit companies

- External revenue across all recharge centers was $2.5 million dollars in fiscal year 2015
- $1.65 from traditional cores (excludes Medical Social Sciences)
- $1 million from for-profit corporations
- $1.5 million from non-profits

Open Access Initiative figures (FY2015)

- UIC - $35K in services purchased from NU cores
- UofC - $124K in services purchased from NU cores

Tax Bill

- The tax bill will arrive soon, but it should be minimal.
- As an example, last year's tax bill was only $30K for the entire University (the amount was further divided amongst various facilities)

External Visitors forms and Liability

- If an external visitor comes to your lab to use equipment, you must file a Volunteers and Visitors Lab Use Agreement with Risk Management
- This form is essential in mitigating NU's potential liability in the event of an incident

Questions from the Audience

Q1: Are the Volunteers and Visitors Lab Use Agreements ever audited to compare against the list of External Customers a core hosts?
A1: The UBI template aims to ensure that this form was filed with the Office of Risk Management. Even though this kind of auditing does not officially take place, cores should protect themselves and NU from potential liability.

Q2: What updates will be made to the UBI template to help make the process less onerous?
A2: Aaron is working with Business Intelligence at the moment to create a Query Studio tool that will provide a list of external customer transactions from NUcore:

- The challenge right now is programming the functionality to pull transactions by "Reconciliation Date". Taxes are paid on a "cash" basis, so the date we were paid is what is important for this report.
- Once this report is created, the BI tool will perform the majority of the work in filling out the UBI spreadsheet, some work will also have to be completed manually.
- For this functionality to be useful, it is important to reconcile transactions in NUcore when your core receives payment from the customer.

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PowerPoint presentations are available in "Manager Documents" on the Core Facilities website

- Presentation by Susan Dennehy, PhD., Administrative Director of the Master of Science in Law program
- Presentation by Matthew Clutter, PhD., Screening Research Scientist, HTAL "Rational Planning of New Services"

Accepting Credit Cards

- Final testing on the deposit side is ongoing, and will be completed shortly
- An announcement will go out as soon as the functionality is ready

Contract Management Software Solution

- Currently, any service contract, lab services agreement, etc. is sent to Susie Wuorinen in the Office of General Counsel
- A module-based software solution that includes a routing process for approvals from PeopleSoft is under consideration, the solution may be a module incorporated into PeopleSoft
- A PeopleSoft-based solution will allow integration with Purchasing modules for easier management and cross reference

LabVIEW Bootcamp, 3/21-3/24, is waiting list only, as attendance filled quickly.

Cost Study Template

- Due to compliance issues associated with cores that are subsidized by Federal sponsored projects AND generating a surplus, the Cost Study template may undergo a slight revision.
- Any questions/concerns regarding this point should be directed to Aaron Rosen.

Questions from the Audience

Q1: How will payments work in the new credit card system?
A1: As it is a web-based application, the body of the "Statement" email as well as the PDF Statement will contain a secure link to the credit card payment interface.
Important Note: NEVER take any credit card information from any customer. The customer must ALWAYS enter their own credit card information directly in the payment interface.

Q2: Is there an update on the NUcore feature for generating training request emails?
A2: This feature is being tested right now, to be released to Production on Monday, 3/7. The settings will allow email addresses to be entered on a product-by-product basis, so that an instrument can be assigned to the appropriate contact for training.