

VA IPA Processing

In order to track of VA IPA award documents, all VA IPA awards, extensions, and modifications must be routed through WISPER to RSP. Campus **will not** submit documents directly to the VA. The Office of Research and Sponsored Programs (RSP) will review all documentation and submit directly to the VA on behalf of campus departments and divisions. RSP involvement will allow for more targeted and timely follow-up of requests that have been outstanding for a significant period of time.

Advance accounts may be requested for VA IPAs. However, should any changes be made to the IPA by the VA, the Department will be responsible for any charges not covered by the revised IPA.

The period of performance for an IPA is the time an individual will be working on the VA grant and cannot exceed two years, an extension for an additional two years may be possible with approval. I.e. if an IPA is requested for 1/1/20XX-6/30/20XX, payroll at the level of effort indicated in the IPA budget is expected to be charged to the IPA project each of the months in that time frame. NOTE: An individual cannot be on an IPA for more than four successive years without a break in service. A full year break must be taken after the fourth consecutive year.

Departments - Complete Steps 1-5 on Pages 1-3

1) UW Departments will be responsible for completing the IPA form and the IPA budget spreadsheet.

Copies of these forms can be found on the RSP Website

VA IPA New Award Form (VA OF-69)

VA IPA Extension Form (VA OF-69)

VA IPA Modification Form (VA OF-69)

REQUIRED Budget Template

<https://www.rsp.wisc.edu/forms/>

[New IPA Form](#)

[IPA Extension Form](#)

[IPA Modification Form](#)

[VA - Required Budget Template for IPAs](#)

2) Budget Completion:

- Only enter information into the gray cells on the form.

Example of completed from on VA Budget Example tab on spreadsheet.

- Additional fund requests include in Employee Name Cell:

"Employee Name" - Additional Funds Request

- Complete these cells as indicated below -

Beg Date - End Date = 10/1/2019-9/30/2020

of years = # of months = 1 year = 12 months

% of effort no more than 2 decimals

- Include any known salary increases, or estimate if unknown.

- Adjust for fringe rate changes at fiscal year. Estimate if rates have not been published.

Do NOT submit a budget form, if the spreadsheet indicates ERROR.

Upload Excel spreadsheet to the WISPER record.

Checklist for IPA Form (VA Form OF-69) Completion Follows

3) OF-69/IPA Form Completion:

- Box 1: Check appropriate box for
New IPA
Modification: change to existing IPA
Extension: adding time and/or funding to existing IPA
- Box 2: Enter Employee Name
- Box 3: DO NOT COMPLETE
- Box 4: Enter Employee Address Information
- Box 5: An IPA is a mobility assignment. Complete if have ever been or currently are on an IPA.
- Box 6: Completed for you.
- Box 7: Update "complete" to UW Department Name
- Box 8: Completed for you.
- Box 9: Update "complete: to UW Department, ADD Dept Address and Zip Code
- Box 10: Enter employee UW working title, cannot be "student"
- Box 11: Enter employee UW Phone Number
- Box 12: Enter name of employee UW supervisor
- Box 13: N/A
- Box 14: Enter Employee annual salary and original date of hire at the UW
NOTE: Must have worked for the UW for at least 90 days prior to being on an IPA.
- Box 15: Choose either VAMC or GRECC, not both
Awards through Research Services/Wanda, remove GRECC, leave VAMC
Awards through the hospital/Charity, remove VAMC, leave GRECC
If neither, enter appropriate designation for VA office
- Box 16: Enter employee VA working title
- Box 17: Enter employee VA phone number
- Box 18: Must be the PI (i.e. person with the VA Grant)
- Box 19: Complete as appropriate for employment. Usually Full time or Part time.
- Box 20: Enter dates IPA will be active (NOTE: Must have same dates as Boxes 26 and 36)
- Box 21: Include requested information from the line detail **PLUS** the following:
VA Grant Name as designated by VA. If more than one, include all grant names and effort on each
Amount of time/effort the individual will spend on this VA project (IPA), indicate in %
Brief statement of how the UW and VA will benefit from the project
- Box 22: Indicate duties and responsibilities at the VA.
- Box 23: Enter employee annual salary (NOTE: Must agree with box 14)
- Box 24: Completed for you.
- Box 25: Replace "INSERT PI Name" with the PI for this IPA (must be PI)
- Box 26: **Only** the information from "Line 26 IPA Form" tab on the budget spreadsheet is entered.
Dates must agree with Box 20 and 36
- Box 27: Replace "INSERT Individual's Name" with the name from Box 2.
- Boxes 28-32: Completed for you.
- Box 33: None. (NOTE For Madison VA IPAs, travel is unallowable)
- Boxes 34-35: Completed for you.
- Box 36: Dates must agree with Boxes 20 and 26
- Verify you have completed all required information. Key sections on highlighted form at:
<https://www.rsp.wisc.edu/forms/>
Form: VA - SAMPLE IPA Form with HIGHLIGHTED Sections

Final Steps on Page 3

4) Employee Signature (Box 37) and Date (Box 38):

- Have employee review completed IPA Form, VA OF-69.
If acceptable, employee must sign Line 37 and date Line 38. Digital signatures are preferable.
The PDF uploaded must remain editable.

NOTE: a current signature is required for:
New IPA requests
Modification to existing IPA
Extension of existing IPA
Significant changes to a request in process

5) Create and Route WISPER Record:

- A) WISPER General Tab:
REQUIRED Short Title: PI [Last Name], IPA [Last Name], [Choose VAMC or GRECC]
VAMC for IPAs with Research Services (Wanda)
GRECC for IPAs with VA Hospital/GRECC (Charity)
Leave blank if any other VA Agency
May indicate Mod or Ext at end, as applicable
- B) Upload: Employee-signed IPA Form, VA OF-69
Completed REQUIRED Budget Template spreadsheet (Excel)
- C) Route to Dean's Office for review and any needed approvals.
NOTE: if multiple departments are involved, approvals should be obtained from each
- D) Dean's Office review and route to RSP for submission to VA.
NOTE: Dean's office should make sure all lines are completed correctly and budget is accurate and does not indicate error

RSP Steps

IPA Review, Submission, and Follow-Up:

RSP will review and submit the VA IPA Form, VA OF-69 and the Budget to the appropriate VA Contact.
RSP will monitor outstanding IPA submissions, following up with the VA on a regular basis.

IPA Form received from VA Contact:

RSP will review the VA-signed IPA form and approved budget for any changes made by the VA HR.
WISPER will be updated with any changes. RSP signature will be obtained.
Fully-executed IPA and budget will be uploaded to the WISPER record.
Fully-executed IPA form and budget will be returned to the appropriate VA Contact.
RSP Pre-Award will complete award set up in WISPER, generating award or modification and notifying campus.
After award or modification is generated, Post-Award Accountant will complete contract/financial set up.

RSP Contacts:

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