VA IPA Processing

In order to track 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.

All individuals must have a VA IPA appointment, or obtain a VA IPA appointment, prior to the start date of a new IPA. Obtaining the IPA appointment requires VA HR paperwork, VA Badging, and possibly other VA activities. Please reach out to the VA HR office for details. RSP is not involved with obtaining the IPA appointment. The IPA form and budget cannot be submitted to the VA without completion the VA IPA appointment. Once it is known a new IPA will be requested, a WISPER record should be started. The IPA form and budget, along with the WISPER record, should be in process to speed up submissions once the VA IPA appointment is confirmed and acceptable dates for the IPA are determined.

For modifications and extensions to existing IPAs, requests must be made prior to the end date of the existing IPA. The VA will not back date. Please make sure you are requesting these with sufficient time for changes, questions, and VA signature. Extensions of existing IPAs will require VA Network Director signature, so will take additional time. Best practice is to begin this request at least 60 days prior to the end of the current IPA (i.e. when the RSP 60-day notice is received).

Advance accounts may be requested for VA IPAs, but are not recommended. 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 pay periods included in that time frame.

NOTE: An individual cannot be on an IPA for more than four successive years without a minimum 60-day break in service. A full year break must be taken after the fourth consecutive year.

The final IPA form and budget will be viewable in WISER via the View Additional Award Documents MSN#### hyperlink on the WISER Documents tab. You must be signed in on campus or via VPN to view these documents. These are the official award documents and should be reviewed prior to requesting a modification or extension.

Departments - Complete Steps 1-4 on Pages 2-4

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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 [https://www.rsp.wisc.edu/forms/]
VA IPA Form (VA OF-69)
Budget Template

2) Budget Completion:
- Only enter information into the gray cells on the form.
- If on more than one IPA, include VA Grant designation/nickname after Employee Name
  "Employee Name" - Intrepid Funding
- Additional fund requests include in Employee Name Cell:
  "Employee Name" - Additional Funds Request
- Revised budget requests include in Employee Name Cell:
  "Employee Name" - Revised Budget
- Complete these cells as indicated below -
  Beg Date - End Date = 10/1/2022-9/30/2024
  % 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.

For budget revisions, please be clear in the WISPER record the change to the existing budget.
Add notes in WISPER on the comments and attachments tab and indicate the amount of the change.
For budget revisions, actual amounts up to the date of the revision can be plugged into the form.
The cells are not locked and formulas can be overwritten.

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

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3) OF-69/IPA Form Completion:

Box 1: Check appropriate box for
   New IPA
   Modification: change to existing IPA within the current IPA dates
   Extension: adding time and funding to existing IPA

Box 2: Enter Employee Name: Last Name, First Name, Middle Name

Box 3: DO NOT COMPLETE

Box 4: Enter Employee Address Information

Box 5: An IPA is a mobility assignment.
       Check No if never on an IPA. Yes if have ever been or currently are on an IPA. Format is MM/YYYY

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: Completed for you.
       If not through Research Services, change VAMC and 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: Indicate the following:

       Reason for this IPA. If a modification or extension, begin this section with a sentence indicating:
       This is a [modification or extension] of an existing IPA. Note changes from prior IPA.
       Brief statement of how the UW and VA will benefit from the project
       VA Grant Name (as designated by VA on the Grand document)
       Amount of time/effort the individual will spend on this VA project (IPA), indicate in %

Box 22: Indicate duties and responsibilities at the VA.

       Included detailed information on the duties/responsibilities at the VA working on this project.
       This section should be very specific, no generalized statements, and unique to this individual.

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

The individual on the IPA should review this document prior to signing. If acceptable, sign as indicated:

Box 37: VA only allows digital/verified or wet signatures. They do not allow DocuSign or electronic signatures.
       In order for RSP to sign use the digital signature. Wet signatures do not easily allow for this.
       NOTE: The PDF uploaded must remain editable, a wet signature can remove that ability.
       Any significant changes to a request in process will require a new signature.

Box 38: Even if the date is included in the digital signature, please type the date signed in this box.

Part 15: DO NOT SIGN in the box in this section. RSP and the VA will complete boxes 39-44.

4) Create and Route WISPER Record:

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This portion of the document is not all-inclusive for completing a WISPER record or routing it. The items noted are specific needs for the IPA request.

A) WISPER General Tab:

REQUIRED Short Title:  PI [Last Name], IPA [Last Name], IPA Request Type (New, Mod, or Ext)

PI must be the PI of the VA Grant, unless there are extenuating circumstances.
Any extenuating circumstances MUST be clearly explained.
If Mod or Ext, Proposal Type is Revision or Continuation.
The original MSN is included as the Related Record.

B) Project tab:

Make sure project description matches REQUIRED Short Title

C) Attachments tab:

Upload employee-signed IPA Form, VA OF-69 (verified that all sections are accurately completed)
Upload completed REQUIRED Budget Template spreadsheet (Excel only, not a PDF)
Include any notes that will clarify the request
For budget modifications, indicate the amount of the budget increase or decrease.

D) Route to Dean's Office for review and any needed approvals.

NOTE: if multiple departments are involved, approvals should be obtained from each
The IPA should be set up in the PI's home department with edits for other departments.

NOTE: Dean's office should make sure IPA Form and WISPER record 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.

Questions on the status should be directed to RSP, not the VA, or check the WISPER record.

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:
Kris DeArmond  kadearmond@rsp.wisc.edu  608/890-3288

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