

How to Request UCSF Research Core Services under the New SFVA Multi-Core Contract: Instructions for Obtaining Task Orders for VA-funded research

UCSF has executed a multi-core master contract with the Veterans Administration (VA). This new agreement simplifies access to UCSF core services for research by eliminating the need for PIs to set up separate contracts and VA purchase authorizations for each core. Commonly used UCSF recharge services are now covered under a single, unified contract.

Why this matters

The multi-core contract will result in less administrative work for PIs, fewer delays when prices change, and smoother access to core services. See the FAQ below for more details.

Summary of new process

Investigators select services from the approved menu of UCSF cores and estimate their anticipated service needs for the fiscal year (July 1–June 30). They then submit a Task Order Request Form reflecting the projected total cost. The approved total establishes a spending ceiling; as long as charges remain within that amount, the VA will pay for services rendered. If projected costs are expected to exceed the approved ceiling, a modification request must be submitted to increase the authorized amount before exceeding it.

New Workflow for Study Teams

1. **Initiate Forms:** Each study will need only one Task Order Request Form and a corresponding VA Form 2237 submission.

Task Order Request Form: The PI or CRC contacts Grace Tinaliga (SFVA Research & Development Office, Budget Team) at Grace.Tinaliga@VA.gov.

- Estimate the number of instances/events of each service needed for the current UCSF fiscal year, July (or current date) to June 30.
- Get prices from the individual cores and calculate line and grand totals.
- Include the **task order total** at top of form. This is the “not-to-exceed” (NTE) amount.
- For “2237 #” field: Use the temporary transaction # (e.g., LASTNAME01) generated in Form 2237 in VISTA. See below.

VA Form 2237: Begin this form through the VA VISTA system. Contact Grace for instructions or to request access as a new user.

- Enter **only one line item** per Task Order, using the **total dollar** amount from the Task Order Request Form.
- In the Description field, enter: “**1 YR total \$XX,XXX - Research support services for [PI Name]’s study entitled “[Study Title].”**”
- **Do not itemize individual services on the 2237.** Detailed pricing should remain in the Task Order Request Form only.

!!! The VA will reimburse only for research services listed and approved on the Task Order. Include all services and quantities you anticipate using in the fiscal year (ending June 30).

2. Submit Forms

The PI submits two (2) documents:

- Email the completed Task Order Request Form to Grace.
- Enter the **VA Form 2237** in Vista platform.
- Grace will review the submission for completeness and forward the full package to the VA Regional Contracting Officer for authorization.

3. Await Authorization

Once authorized at the regional level, the Task Order with the Purchase Order (PO) number will be returned to the SFVA Research Budget Team, the UCSF Office of Sponsored Research (OSR), and UCSF CTSI Finance. OSR will enter the contract into the UCSF system and assign a “master award number” for the study.

- **!!!** The PI will be sent the approved Task Order with the Purchased Order # from the UCSF CTSI Finance Director (Nick Clem) via email.

4. Distribute Approved Task Order

The PI/study team must then send the Task Order/PO# to each core and to all parties responsible for the study’s fiscal oversight, for example, the person managing the chart of accounts and/or your post-award administrator (if that is not Grace).

- **!!! Do not send** the Task Order or PO # to unapproved cores. Only approved cores will be reimbursed for services.

5. Monitor and Adjust

- Track spending against the Task Order not-to-exceed amount. If you expect to exceed the approved total before the end of the fiscal year on June 30, email [Grace Tinaliga](#) to request a Task Order modification.
- Any unused funds will be de-obligated during the annual closeout and reconciliation. Grace Tinaliga will email you a “modification memo” and instructions on next steps if you have remaining funds at the end of the performance period.

6. Annual Renewal

Task Orders need to be **renewed** before the start of the UCSF fiscal year (July-June). Begin the renewal process (Step 1) and submit the Task Order Request Form at least 5-6 weeks in advance to ensure continuation of payment.

FAQ Section:

- **When does this new procedure go into effect?**

New task orders are ready to be issued, both for new VA-funded studies and for current studies that require renewal of a contract or purchase order.

- **I have an existing contract for my current study. What steps should I take?**

If you have an existing contract, that agreement will remain in effect until the current option period expires. At that time, you will follow this new procedure which will align with UCSF’s fiscal year (July-June). You should have already heard from Grace Tinaliga regarding a new task order under this Multi-Core Contract procedure for your continuing study.

- **What is the Task Order request submission timeline and frequency?**

If this is your first Task Order request (for a new study or a renewal at the end of the current option period of an existing study):

- **Initial submission (alignment period):** Submit a Task Order Request Form with estimated services needed **from now through June 30, 2026**. This first request will cover **less than 12 months** and will align your study with the UCSF fiscal year (July–June).

- **July renewal (full fiscal year submission):** In mid-May 2026, you must submit another Task Order Request Form covering the full fiscal year (July 1, 2026–June 30, 2027).
 - **Key takeaway:** All Task Orders must be renewed before the July fiscal year cycle, regardless of which month you submit the initial one. Submit the Task Order Request Form in mid-May to allow 4-6 weeks for processing prior to the July 1 start of the fiscal year renewal.
- **How long does it take to get a new task order approved and a PO assigned? How long for a modification?** These are the best estimates and may vary depending on volume.
 - A **new task** order typically takes around **2 weeks**.
 - **Modifications** may take a **month**.
 - **How will I know when I can start using the UCSF services on the task order?**

When the PI receives the approved Task Order from Nick Clem (UCSF CTSI Finance), it will include a PO# and start date. The PI must send the Task Order to all cores and use their services within the **period of performance** stated on the Task Order.
 - **Does a PI need a separate task order for each research study?**

Yes, a task order is linked to a **study**, not to the PI. Be sure to add all cores/services for the study under the same task order.
 - **When do I need to modify an existing Task Order?**
 - Increase funding if you are getting near the not-to-exceed ceiling for any reason.
 - To add a new service/line item you did not request initially.
 - To add a service that is not already available on the Task Order Request Form.
 - To de-obligate any unused funds after the period of performance ends.
 - **What actions do I take if a Core's fee increases during my study?** The established contract is “cost reimbursable,” meaning UCSF will be paid for the actual cost. If rates change, often no action is required *unless* the total amount exceeds. However, each task order is established with a not-to-exceed ceiling amount. If you anticipate exceeding this amount, you need to submit a modification request to add funds before hitting this ceiling.
 - **Should I track spending against the not-to-exceed limit (NTE)? What should I do if I get close to the limit?**

Yes. You should monitor spending throughout the project period to avoid exceeding the NTE ceiling. If you anticipate reaching the limit, submit a modification request to Grace to increase the spending ceiling. **Modifications typically take about one month** to process and approve, so plan accordingly.
 - **How do I know what the not-to-exceed amount is?**

This is the total amount from the Task Order Request Form, which you will add as a single line item to the VA 2237 Form and at the top of the Task Order Request Form.
 - **What should I do if the service I want to use is not listed on the Task Order Request Form (TORF)?**

If a service is not listed, it is not currently included in the contract UCSF has with the SFVAHCS. The Core will need to work directly with Grace to determine whether the service

can be added. The process and timeline vary depending on whether the Core already has other services covered under the contract.

- **What happens if I overestimate the dollar amount on my task order and have unspent funds at the end of the fiscal year?**

Any unused funds will be de-obligated during the annual closeout and reconciliation. Grace Tinaliga will email you a “modification memo” and instructions on next steps.

- **I’m under/over-estimated the number of IV placement procedures (for example) I’m going to need. Do I need to submit a modification?**

Not necessarily; Task Order modifications are based on **excesses in the total dollar amount**, not the quantity of services. However, a significant increase in quantity that would likely breach the not-to-exceed amount would need a modification.

- **How do the Cores I am using get the approved Task Order and PO number?**

It is the **PI’s responsibility** to send the **approved** Task Order (TO) to each Core and to your finance department(s) after you receive the approved document from Nick Clem at the UCSF CTSI.

!!! Do not send the Purchase Order # to any unapproved cores. Only approved cores (those in the list below) on your project’s approved Task Order will be reimbursed for services.

- **Who should I contact if I have any questions?**

Please contact Eva Lau or Grace Tinaliga in the Budget Division at the SFVA Research & Development Office (Eva.Lau@VA.gov or Grace.Tinaliga@VA.gov)

- **What UCSF cores are included on the SFVA Task Order Request Form?**

- Biospecimen Processing Laboratory
- Cardiovascular Research Institute
- Cell and Genomic Engineering Core
- Center for Advanced Technologies
- Clinical Imaging Core Service
- CRS Nursing Services
- CTSI Consultation Service
- Genomic Medicine Laboratory
- Genomics CoLab
- Gnotobiotic Core Facilities
- Histology and Biomarkers Core
- Human Imaging Core
- Immunology Core
- Investigational Drug Services
- Investigational Pharmacy
- Lab Animal Resource Center (LARC)
- Laboratory for Cell Analysis (LCA)
- Metabolic Core Facility (QMAC)
- Microbial Genomics Core
- Nikon Center (LCA)
- PALM CoLab
- Parnassus Flow Cytometry CoLab
- PREMIER P30
- UCSF Medical Center- CT Bone Density

Requesting an SFVA Task Order: Quick Guide for PIs



STEP 1 – Initiate Forms

Request **Task Order Request Form (TORF)** from SFVA R&D Office (Grace.Tinaliga@VA.gov)

- ✓ Select services you plan to use from the approved list
- ✓ Estimate # of research services for current fiscal year (**July 1 or current date–June 30**)
- ✓ Calculate total cost and enter at top of form
- ✓ Enter Temporary 2237 # (from below)

Begin **Form 2237** in the SFVA VISTA portal

- ✓ Enter only one line item from each TORF, using the total amount
- ✓ In "Description" Field: "1 YR total \$XX, XXX- Research support services for [PI name]'s study entitled "[study title]"
- ✓ Enter temporary transaction # "[PILASTNAME01]" into TORF, Row 5
- ✓ Do not itemize services on Form 2237



STEP 2 – Submit Forms (TORF + 2237)

- 1) Email completed TO Request Form to Grace
- 2) Enter Form 2237 through VISTA platform



STEP 3 – Await Authorization

- ✓ PI receives signed Task Order with PO# (~2 weeks) from Nick Clem
- ✓ FYI: The UCSF Office of Sponsored Research (OSR) also receives approved Task Order:
 - ✓ OSR enters Task Order in the UCSF system, and
 - ✓ Assigns the study a UCSF master award #

Requesting an SFVA Task Order: Quick Guide for PIs



STEP 4 - Distribute

- ✓ Send the Task Order with PO# to:
 - ✓ Each core listed
 - ✓ Any non-SFVA finance unit with fiscal responsibility (Grace already has a copy.)
- ✓ Do **not** share Task Order/PO# with unapproved cores



STEP 5 – Monitor & Adjust

- ✓ Track total spending during study
- ✓ If approaching not-to-exceed amount, submit modification to Grace Tinaliga at least 1 month in advance to increase limit
- ✓ If funds left over after performance period, Grace Tinaliga will email you a “modification memo” and instructions on how to submit a modification



STEP 6 – Renew

- ✓ Renew task order services and amounts for the start of each UCSF fiscal year (July 1)
- ✓ Submit Task Order Request Form (Step 1) at least 5-6 weeks in advance (mid- to late-May) to ensure continuation of payment



Need a Change?

- Increase funding if you are getting near the not-to-exceed ceiling for any reason
- To add a new service/line item you did not request initially
- To add a service that is not already available on the Task Order Request Form
- Contact Grace Tinaliga (Grace.Tinaliga@va.gov) or Eva Lau (Eva.Lau@va.gov)