The Latest Buzz with G&C Accounting

Wednesday, Dec. 15, 2021

1:00 – 2:30 PM

GT Georgia Tech.

Agenda

Topic	Presenter(s)
Welcome, Research Updates	Josh Rosenberg
Advance Projects – Nuts and Bolts!	Cindy Hope
Commitment Accounting Update	Terryl Barnes
Project Accounting Update	Glenn Campopiano
Updates: HERD	Jonathon Jeffries
System Team Update	Amy Zhang
Training Update	Lee Broxton
Closing	Josh Rosenberg

Post Award Research Updates

Josh Rosenberg

Sr. Director, Grants and Contracts

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Research Trends

Total GT Awards : FY22 v. FY21 YOY

AWARDS: Cumulative Report thru: NOVEMBER					
College/Unit	FY22		FY21		Award Dollar Variance
	Awarded Amount	Awards	Awarded Amount	Awards	
COMP	$13,340,328	59	$17,797,635	100	-25.0%
COS	$37,357,606	175	$31,194,683	159	19.8%
DSGN	$8,086,498	297	$7,444,578	321	8.6%
ENGR	$142,182,081	563	$126,482,496	519	12.4%
GTRI	$370,749,553	381	$384,286,200	390	-3.5%
IAC	$1,952,618	17	$2,838,688	20	-31.2%
OTHERS	$47,090,104	155	$23,459,826	137	100.7%
SCB	$358,225	3	$315,000	1	13.7%
Total	**$621,117,013**	**1,650**	**$593,819,105**	**1,647**	**4.6%**
Resident Instruction and Other	**$250,367,460**	**1,269**	**$209,532,905**	**1,257**	**19.5%**

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Research Trends

RI Awards – Sponsor Detail: FY22 v. FY21 YOY

RI NEW AWARDS (Through November)						
Federal Agency or Sponsor Type	FY22	% of RI Portfolio	FY21	22 v. 21 $ Variance	22 v. 21 % Variance	5 Year Avg
NATIONAL SCIENCE FOUNDATION (NSF)	65,649,730	26%	40,488,437	25,161,293	62%	55,518,839
INDUSTRIAL SPONSORS	27,925,193	11%	23,141,975	4,783,218	21%	25,088,524
DHHS	25,726,408	10%	28,983,531	(3,257,123)	-11%	24,179,750
US DEPT OF ENERGY	23,706,463	9%	23,701,864	4,599	0%	16,805,804
INDUS RES INST/FDNS/SOC	23,248,837	9%	14,960,324	8,288,514	55%	14,185,657
COLL/UNIV/RES INSTITUTES	19,867,980	8%	21,076,907	(1,208,927)	-6%	19,821,154
US DEPT OF EDUCATION	18,550,955	7%	3,879,000	14,671,955	378%	5,493,591
NASA	10,405,488	4%	5,371,201	5,034,287	94%	7,626,859
NAVY	7,754,022	3%	1,506,356	6,247,666	415%	5,247,944
US DEPT OF COMMERCE	6,953,744	3%	5,282,401	1,671,343	32%	5,513,972
US DEPT OF TRANSPORTATION	6,149,967	2%	8,304,207	(2,154,240)	-26%	3,581,091
GOVT-OWNED/CONTRACTOR OP	3,037,534	1%	4,531,274	(1,493,740)	-33%	3,845,709
AIR FORCE	2,736,775	1%	4,736,872	(2,000,097)	-42%	5,628,352
STATE & LOCAL GOVERNMENT	2,365,221	1%	5,377,242	(3,012,021)	-56%	4,929,018
US DEPT OF DEFENSE	1,962,127	1%	11,318,506	(9,356,379)	-83%	3,406,303
ARMY	1,821,065	1%	3,310,755	(1,489,690)	-45%	2,100,686
ENVIRONMENTAL PROTECTION AGENCY	857,708	0%	90,000	767,708	853%	231,542
LIBRARY OF CONGRESS	766,011	0%	450,460	315,551	70%	379,165
US DEPT OF LABOR	554,179	0%	822,460	(268,281)	-33%	496,272
US DEPT OF INTERIOR	146,434	0%	456,505	(310,071)	-68%	297,258
NATIONAL FOUNDATION ON THE ARTS & HUMANITIES	106,250	0%	-	106,250		53,649
US DEPT OF AGRICULTURE	50,000	0%	50,000	-	0%	1,067,652
VETERANS ADMINISTRATION	20,000	0%	80,995	(60,995)	-75%	39,095
MULTILATERAL ORGANIZATIONS	4,690	0%	5,278	(588)	-11%	18,674
NATIONAL LIBRARY SERVICES FOR THE BLIND AND PRINT DISABLED	677	0%	-	677		135
DEPT OF HOMELAND SECURITY	-	0%	1,000,000	(1,000,000)	-100%	401,581
NUCLEAR REGULATORY COMM	-	0%	499,927	(499,927)	-100%	303,962
TENNESSEE VALLEY AUTHORITY	-	0%	-	-	0%	6,300
US DEPT OF JUSTICE	-	0%	86,428	(86,428)	-100%	154,009
US INTERNATIONAL TRADE COMMISSION	-	0%	20,000	(20,000)	-100%	4,000
Grand Total	250,367,460	100%	209,532,905	40,834,555	19.5%	206,426,548

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Research Trends

RI Expenditures: FY22 v. FY21 YOY

Expenditure Analysis: Nov.	FY22 YTD	FY21 YTD	Change
Salaries and Wages	54,755,876	50,741,035	7.9%
Other Direct Costs	24,248,956	13,466,702	80.1%
Subcontracts	25,515,209	19,661,497	29.8%
Fringe Benefits	10,966,746	10,525,166	4.2%
Tuition Remission	13,097,169	12,149,259	7.8%
M&S	10,191,540	7,444,875	36.9%
Equipment	2,082,897	2,607,568	-20.1%
Domestic Travel	533,622	60,673	779.5%
Foreign Travel	149,269	20,132	641.5%
Unallocated	379,289	73,898	413.3%
High Performance Computing	13,558	-	100.0%
DIRECT	**141,934,130**	**116,750,805**	**21.6%**
IDC	**39,484,764**	**35,081,791**	**12.6%**
Total	**181,418,894**	**151,832,596**	**19.5%**

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Invoices and Financial Reports

INVOICING			
Invoicing YTD FY2021 vs. FY2022 (November)			
Row Labels	July - Nov. 2021 (FY22)	Monthly FY22 average	July - Nov. 2020 (FY21)
G&C GIT Standard	$ 1,328,158	$ 265,631.53	$ 641,432
G&C GIT Standard Certification Required	$ 175,413	$ 35,083	$ 234,047
G&C GTRC Custom Certification Required	$ 2,960,936	$ 592,187	$ 2,283,290
G&C GTRC Standard	$ 20,065,777	$ 4,013,155	$ 14,288,666
G&C GTRC Standard Certification Required	$ 29,105,401	$ 5,821,080	$ 18,628,865
G&C In House	$ 20,490,947	$ 4,098,189	$ 17,895,671
G&C LOC Draw	$ 63,557,555	$ 12,711,511	$ 62,360,349
G&C SF1034	$ 3,922,655	$ 784,531	$ 4,487,410
G&C SF 270	$ 19,613,942	$ 3,922,788	$ 21,120,368
Blank	$ -	$ -	$ 123,391
Grand Total	**$ 161,220,783**	**$ 32,244,157**	**$ 142,063,490**
Raw Invoice Counts	**6,108**	**1,222**	**6,051**

Year over Year Invoicing Change	Dollars	Invoice Counts	
YTD Increase in FY22 over FY21	$ 19,157,293	57	
YTD percentage increase	13.5%	0.9%	

FINANCIAL REPORTS			
Financial Reports YTD FY2021			
Financial Reports (July - November 2021)	TOTAL		
Annual Financial Report	39		
Final Financial Report	78		
Financial Report Conversion	1		
Monthly Financial Report	68		
Quarterly Financial Report	297		
Semi-Annual Financial Report	17		
Revised Financial Report	1		
TOTALS	**501**		

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Advance Project Numbers

Cindy Hope
Director, Office of Sponsored Programs

Advanced Project Number

- Georgia Tech Policy Library, Research, Sponsored Programs Policies, 2.7
  - "The Georgia Tech Advance Project Number Policy permits the establishment of an account to which expenses may be charged on behalf of an anticipated program prior to receipt of a grant or execution of an agreement…"
- Related to but different from 2 CFR 200.458 Pre-award costs
  - "Pre-award costs are those incurred prior to the effective date of the Federal award or subaward directly pursuant to the negotiation and in anticipation of the Federal award where such costs are necessary for efficient and timely performance of the scope of work."
- Does not override compliance requirements (e.g. IRB, Export Review, System Security Plan) that must be met prior to award initiation.

(Updates to the Policy and the Form are in process but do not materially change the requirements.)

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Advanced Project Number

Advance Project Number Request Form

Directions: Submit this form with all signatures and attachments to your contracting officer. For more information, please see: [link to advance project number policy]

PD/PI Name: _____

School/Lab/Center: _____

Project Title: _____

Sponsor Name: _____

Anticipated Award Start Date: _____   Period Covered by Request: _____

Expected Award Amount: _____   Funds   Requested:

_____

Type of Request:

Type A- Limited to 90 days (must satisfy all of the below)

☐ The award is a new award or competing-continuation award funded by the U.S. government.

☐ The terms and conditions of the anticipated award permit 90 calendar day pre-award costs **OR** OSP has received a Pre-Contract Cost Authorization Letter or Authorization to Proceed Letter from the Sponsor's Contracting Representative.

☐ The pre-award costs requested are necessary to conduct the project and allowable under the terms of the anticipated award.

☐ Attach evidence from sponsor indicating when an award will be made.

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Advanced Project Number

Type B-

☐ Type "A" conditions cannot be met, but the PI and the department/unit are willing to accept the additional risk involved. The department/unit wishes to proactively identify a discretionary project number to clear any deficit that might result if the award is not received or a mutually acceptable agreement with the sponsor is not possible.

☐ Discretionary Project Number: _____

Certifications

I hereby certify that there is positive evidence that the proposed sponsor intends to fund this project as described above. In the event the sponsor funding for this project is not received, sufficient institutional funds are available in my administrative unit to cover charges against an advance project number not to exceed $_____ for the period beginning _____ and ending _____ . These funds are to be budgeted as follows, pending receipt of sponsored funds for the project. I further certify that no deliverables will be made prior to contract award.

Principal Investigator: Date:

Departmental Business Official   Date:

Sponsored Project Support Director (GTRI Only)   Date:

School Chair/GTRI Lab Director   Date:

Director, Office of Sponsored Programs: Date:

Project Number Assigned by OSP: Date:

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Commitment Accounting Update

Terryl Barnes

Commitment Accounting Mgr

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EDR Processing

EDR Processing

- Any EDRs that are saved but not submitted post GL-processing will be deleted overnight.

- Once an EDR is approved by all level approvers, it is ready to be processed.

- BORDBEUPD process posts funding changes to the Department Budget Table and Job Data and releases the lock on the record.

- Process runs in batch daily during the following times:
  - 5:00 a.m.
  - 9:00 a.m.
  - 1:00 p.m.
  - 5:00 p.m.

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EDR Justifications

New Distribution

- Clerical
- DistPerct
- EndGrant
- FYE Adjust
- FringeTax
- FundingSrc
- GrantLate
- Other
- Overspent
- PositionFu

- **Clerical**: Typos or mis-keyed entries (e.g. GR10005560 vs GR10005660). An overlooked expense is not a clerical error.

- **GrantLate**: Expenses to be charged to a forthcoming grant should be parked on an Undesignated worktag or an advance worktag and not another grant.

- **Other**: Requires detail. "To correct an error" or "To transfer to correct project" are insufficient.

- **Overspent:** An overrun on one grant should not be transferred to a different grant for the purpose of resolving the former's deficit.

- **PositionFu**: EDRs that correct a recent position funding change should have a matching CPF submitted as well.

EDRs and late cost transfers should not be used as a means of managing awards

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> 90 Day EDR Justification

- **Only applies to EDRs when moving salary onto a grant (e.g. 03GR00000000)**

- **Complete transmittal form with detail explanations**
    - Found on [Budget Office Website](#)

- **Common reasons to exceptions**
    - Initial or continuing sponsor funding delayed beyond 90 days.
    - Specific approval received by sponsored agency
    - Transfers to cost share or between grants within the same award

- Job Aid: [How Do I Submit A Current Fiscal Year Late Express Direct Retro (over 90 days) Request?](#)

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Employee Cost Detail

Report ID: BCAR005   Page No. 1
                                                                                                            Run Date 12/28/2020
Home Dept: Run Time 11:04:07
      Org:

Title: Name: Empl ID: Monthly/Hourly Rate: $ 6,250.00/Month   FTE: 1.00

Fund	10600 Other General														
Combo Code	03DE00002341														
Acct/Obj#	521100														
Start/Stop Date	2020-07-01 2021-06-30														
HR POS# Rcd# JC#	30016943 0 421X04														Total
Past Pay Period	Original Amt	Orig %	Adj $	Original Amt	Orig %	Adj $	Original Amt	Orig %	Adj $	Original Amt	Orig %	Adj $			
JUL 1 31-JUL-2020	6,250.00	100.000													6,250.00
AUG 2 31-AUG-2020	6,250.00	100.000													6,250.00
SEP 3 30-SEP-2020	6,250.00	100.000													6,250.00
OCT 4 31-OCT-2020	6,250.00	100.000													6,250.00
NOV 5 30-NOV-2020	6,250.00	100.000													6,250.00
Future Acctg Period	Original Amt	Orig %	Adj %	Original Amt	Orig %	Adj %	Original Amt	Orig %	Adj %	Original Amt	Orig %	Adj %			
DEC 6	6,250.00	100.000													6,250.00
JAN 7	6,250.00	100.000													6,250.00
FEB 8	6,250.00	100.000													6,250.00
MAR 9	6,250.00	100.000													6,250.00
APR 10	6,250.00	100.000													6,250.00
MAY 11	6,250.00	100.000													6,250.00
JUN 12	6,250.00	100.000													6,250.00
Total	75,000.00														75,000.00

- Once EDR is submitted, employee cost detail report is updated to reflect proposed changes.

- If EDR is denied, changes revert back to original distribution (resubmit EDR)

- If EDR is approved, changes are posted to Workday/ad hoc salary details lite report

- Confirm posting in Workday/EDW ad hoc salary details lite report
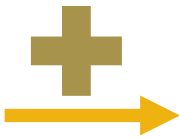
17

Workflow Approvals

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Workflow Approval

"Reports To" Manager $+$ Department Approvers (Level 1 and 2) $+$ Central Approver (Level 4) $+$ Central Approver (Level 5) $+$

Ad-Hoc Approver and/or **Ad-Hoc** Reviewer can be added wherever there is a plus sign

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List of Ad Hoc Approvers

- Ad Hoc Approvers are individuals who are not part of the established approval workflow
- They need to indicate their approval for a transactions.
- Could be from another department
- Level 2 Financial Approver for CA transactions
- Contact adhoc approver **BEFORE** inserting them into a transaction

- www.budgets.gatech.edu

Central Office Approvals

Transaction	Level 4	Level 5
Express Direct Retro	N/A	Commitment Accounting
Change Position Funding	N/A	Commitment Accounting

Navigation for Ad Hoc Approvers

Commitment Accounting Ad Hoc Approvers

List of Approvers

CA OUC Approver List

Export Visible   Download

CA OUC Approver List

Show 10 entries   »
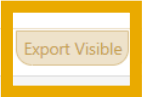
| Empl ID	Oper ID	Name	Dept ID	Dept Name	Group	Appr Type
1234567	1234567@030	Aalfs,David D	053	GTRI-Sensors Elec (GTRI-SEAL)	ADHOC	BOR GA Tech GTRI Manager
1234567	1234567@030	Aaron,DeKisha M	536	Housing Office	ADHOC	BOR GA Tech Manager
1234567	1234567@030	Abdallah,Chaouki Tanios	120	Executive VP of Research	ADHOC	BOR GA Tech Manager
1234567	1234567@030	Abernethy,Jacob D	365	School of Computer Science	ADHOC	BOR GA Tech Manager
1234567	1234567@030	Abikoye,Olabisi	360	Computing, College of	ADHOC	BOR GA Tech Manager
1234567	1234567@030	Abikoye,Olabisi	361	Graphics,Vis & Usability (GVU)	DEPT_LEVEL	LVL1
1234567	1234567@030	Abikoye,Olabisi	361	Graphics,Vis & Usability (GVU)	DEPT_LEVEL	LVL2
1234567	1234567@030	Abikoye,Olabisi	962	Computational Health Analytics	DEPT_LEVEL	LVL1
1234567	1234567@030	Abikoye,Olabisi	962	Computational Health Analytics	DEPT_LEVEL	LVL2
1234567	1234567@030	Abikoye,Olabisi	367	Computational Science & Eng	DEPT_LEVEL	LVL2

Showing 1 to 10 of 6,427 entries   Previous 1 2 3 4 5 … 643 Next

List of Ad Hoc Approvers: Export Visible and Download

Export Visible
Download

Print
Excel
Copy

Appr Type
BOR GA Tech GTRI Manager
BOR GA Tech Manager
BOR GA Tech Manager
BOR GA Tech Manager
BOR GA Tech Manager
LVL1
LVL2
LVL1
LVL2
LVL2

Export Visib   Download
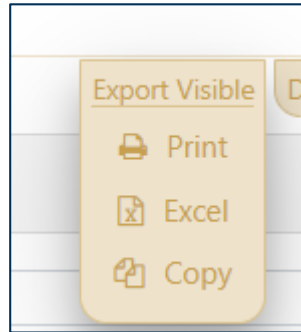
Appr Type
BOR GA Tech GTRI Manager
BOR GA Tech Manager
BOR GA Tech Manager
BOR GA Tech Manager
BOR GA Tech Manager
LVL1
LVL2
LVL1
LVL2
LVL2

Download CA Approver List Report

Drag which fields to include or not include in your downloaded report. You may also use the buttons below to move one or more fields (use the [CTRL] key to select multiple). Reorder your included fields by dragging fields as needed.

Available Fields

Empl ID
Oper ID
Dept Name
Group

Included Fields

Dept ID
Name
Appr Type

Cancel   Download Report

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Ad Hoc Approver List Report

	A	B	C
1	**Georgia Institute of Technology**		
2	**CA OUC Approver List**		
3	*Run Date: 3/24/2021 7:46:36 AM*		
4			
5	**Dept ID**	**Name**	**Appr Type**
6	50	Brinkley,Sharonneika Angelique	LVL1
7	50	Betterson,Jahmele German	LVL2
8	50	Sims,Germaine Yvette	LVL1
9	50	Campbell,Kimberly E	LVL1
10	50	Santana,Ervin	LVL1
11	50	Shaffer,Camille Louise	LVL1
12	50	Harrison,Ricky Terrell	LVL2
13	50	Pounds,Iteeah M	LVL1
14	50	Green,Allana	LVL1
15	50	Ellison,Sonia Y	LVL1
16	50	Drummond,Christopher K	LVL2
17	50	McCoy,Julie H	LVL2
18	50	Parrish,Bridgette	LVL1

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Project Accounting Topics

Glenn Campopiano, CRA

Project Accounting
Director of Project Accounting

Grants and Contracts Accounting

Project Management

A few slides on Requesting a New award/ Grant line and Budget Revisions.

Creating additional grant lines can help you manage tasks, interdepartmental transfers and incremental funding (especially on awards with no carryforward).

Also for some ONR awards with multiple ACRN payment lines it helps G&C invoice correctly.

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Grants and Contracts Accounting

- Grant Lines
- Set up distinct period of performance
- Allocate a portion of budget for a task or another researcher.
- Create a line for Equipment purchases or to track specific M&S charges for fabrication later on.
- Group travel or conference expenses
- Participant costs will /should always have a dedicated grant line.
- Instructions in Service Now

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Grants and Contracts Accounting

KB0022059 - Latest Version

Request New Award Line/Grant

👤 Revised by Thomas Ware · 📅 2y ago · 👁 126 Views · ☆ ☆ ☆ ☆ ☆

Introduction

Overview

This is a department-initiated process to request that a new Award Line/Grant be added to an existing award while the total award amount remains the same.

Considerations

Policies related to this process may be found in the Business & Finance Policy Book.

- Examples of when to initiate this process: Add an internal collaborator to the award, add a new sub-award that was not proposed in the original budget.

- If the total award amount has changed, a modification must be initiated by the Office of Sponsored Programs or Office of Industry Engagement and the Award Amendment process completed by Grants & Contracts Accounting in Workday.

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Grants and Contracts Accounting

- Budget Revisions
- When you add a grant line you will have to add budget to it.
- After receiving new grant line the next step is to do the budget revision – moving budget from an existing line to the new line.
- Sometimes a budget revision is needed due to a change in the way the project is progressing. Maybe you received sponsor approval to add more salary expense by reducing travel expense.
- Some sponsors (GDOT) require updated budgets when you spend outside of the original budget.
- Instructions in Service Now

Grants and Contracts Accounting

KB0022060 - Latest Version

Budget Amendment for Organization

👤 Revised by Thomas Ware · 📅 2y ago · 👁 389 Views · ★ ★ ★ ☆ ☆

Introduction

Overview

This process is used by Grant Managers to amend and re-allocate funds within a grant or multiple grants within an award.

Considerations

Policies related to this process may be found in the Business & Finance Policy Book.

- The Award and all award lines/grants must be submitted and approved by Grants & Contracts Accounting.

- The employee completing this step must belong to the appropriate company, if not Georgia Tech.

- An original award budget must exist in order to complete this step.

- If re-allocating funds between multiple grants within one award, all funds that are being transferred must be deducted from the original grant and added to the new grant.

- If re-allocating funds between one grant, all funds that are being transferred must be deducted from the original object class and the same amount added to one or more object classes.

Instructions

Cost Accounting Updates

Jonathon Jeffries

Director, Cost Accounting

Georgia Tech

Cost Accounting – HERD R&D Study

- Higher Education Research and Development (HERD) Survey is the primary source of information on separately accounted for R&D expenditures within higher education institutions in the United States and outlying areas.

- Completed by all US academic institutions with 150K in R&D expenditures; FY19 was 916 Colleges/Universities

- GIT completes the study as a joint effort between GTRI, Grants and Contract, and Institutional Research & Planning

- Includes both Sponsored and Non-Sponsored Research Expenditures

- Data available at https://www.nsf.gov/statistics/srvyherd/#sd; FY19 Most Current

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Cost Accounting – HERD R&D Study

- Type of Data Collected (RI and GTRI)

  - Federal and Nonfederal by sources of funding and field of study

  - Basic vs Applied Research

  - Spending by ledger (salaries, equipment, software, subcontracts)

  - Amount of money passed through or received via subcontracts by defined survey definition (US Higher Education, Industry, Foreign, etc.)

  - Unreimbursed F&A Calculation

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Cost Accounting – HERD FY 19 Results

- Nationally, Georgia Tech ranked 21st in Research and Development expenditures in FY2019 at $960.17M, and is expected to increase in ranking for FY2020 with a record $1,048.99M in Research and Development expenditures reported for FY2020.

- For FY2019 Georgia Tech ranked 2nd among peer institutions in Department of Defense (DoD) funding for the third consecutive year. DoD funding has increased $56.85M to $580.25M. Nonfederal funding has increased by $14.51M, with steady year-over-year increases, with the exception of a small decrease in FY2017.

Source: IRP https://irp.gatech.edu/research-reports/rd-expenditures-analysis

Cost Accounting – HERD FY 19 Results

R&D ($) by Funding Source	R&D ($) by Funding Agency	R&D ($) by Discipline
• U.S. Federal Gov. ($716.21M) – 8th	• DoD ($523.40M) – 2nd	• Engineering ($664.70M) – 2nd
• State and Local Government ($92.59M) – 8th	• NASA ($39.94M) – 7th	• Computer & Info Sciences ($164.66M) – 3rd
• Business ($66.78M) – 20th	• NSF ($75.69M) – 16th	• Mathematics & Statistics ($8.06M) – 22nd
• Institutional Funds ($70.90M) – 92nd	• ENERGY ($16.08M) – 34th	• Geo, Atmos, and Ocean Sciences ($12.26M) – 59th
• Nonprofit Organizations ($13.39M) – 94th	• HHS ($41.45M) – 108th	• Physical Sciences ($38.23M) – 38th
• All Other Sources ($0.3M) – 233rd	• USDA ($1.06M) – 110th	• Non-S&E Fields ($29.09M) – 52nd
	• Other Federal Agencies ($18.59M) – 50th	• Life Sciences ($33.85M) – 158th
	• Nonfederal ($243.96M) – 53rd	• Social Sciences ($5.77M) – 101st
		• Psychology ($3.55M) – 104th

Source: IRP https://irp.gatech.edu/research-reports/rd-expenditures-analysis

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Cost Accounting – HERD FY 19 Results

- Notable increase in Computer & Information Sciences (61.51%), Engineering (24.53%), Geosciences, Atmospheric and Ocean Sciences (13.56%).
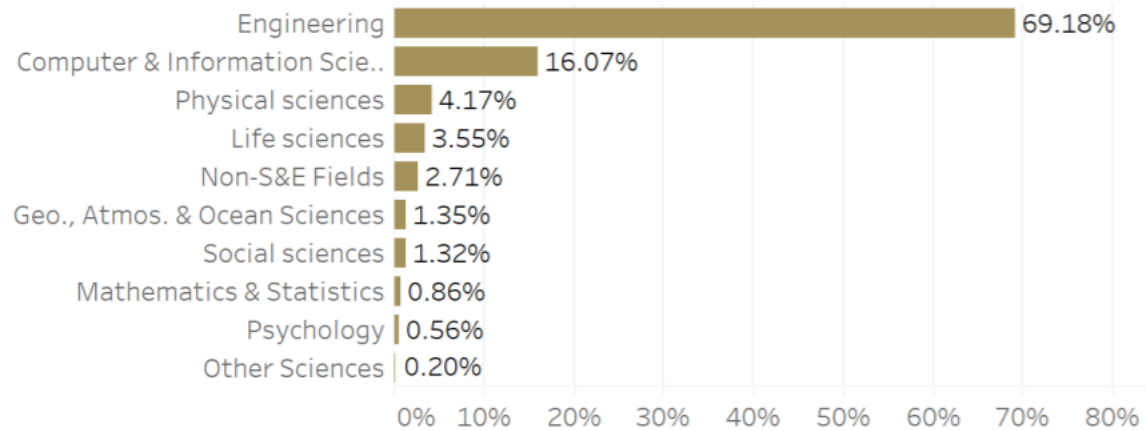
Figure 7: Distribution of Georgia Tech's R&D Expenditures by Discipline (FY2016-2020)

Source: IRP https://irp.gatech.edu/research-reports/rd-expenditures-analysis

System Team Updates

Amy Zhang
Application Support Analyst Lead

Georgia Tech

Welcome to our new team members

Neli Tranakiev

ERP Appl Support Analyst II, Grants & Contracts Accounting

Tony Wang

Business Analyst I, Grants & Contracts Accounting

https://www.grants.gatech.edu/staff

Georgia Tech

VPRA Research Education & Outreach Team Update

Lee Broxton, M.Ed.

Training Specialist

December 15, 2021

Georgia Tech

Welcome to our new Team Member

Elizabeth Omiteru-Salami, Ed.D
Training Specialist
Research Education & Outreach Team

Georgia Tech

New Learning Management System (LMS): SABA Quest

Overview

- VPRA/OSP is no longer using the RosterTech learning management system at https://training.osp.gatech.edu
  - What Has Changed
    - Historical data access
    - How to access training that was hosted at that site
    - Internal training and events – still in transition
  - Introduction of Saba Quest LMS and it's Features
    - Browse / Search function
    - Live Training Calendar (Catalog Calendar / My Events)
    - Learning Catalog
    - Certification Tracking
    - Saba Quest LMS Help – 3 Manuals with Job Aids
    - Additional Features / functionality
    - Initial Checks / Tasks
  - Communications and Updates

Upcoming Spring Semester Classes

Training

Events

Saba Quest LMS– **Sign in with GT credentials and register!**

Offered Virtually, via BlueJeans, unless otherwise noted

January 10th
Basic Certification Workshop,
9:00am - 1:30pm **(Virtual)**

January 11th
Cayuse Proposal System,
9:00am – 10:30am **(Virtual)**

January 13th
eRouting Proposal Module,
2:00pm – 3:30pm **(Virtual)**

February 1st
Pre-Award Part 1,
12:30pm – 3:00pm **(Virtual)**

February 3rd
Pre-Award Part 2,
9:30am – 12:00pm **(Virtual)**

February 8th
eRouting Proposal Module,
9:00am – 10:30am **(Virtual)**

February 10th
Basic Certification Workshop,
9:00am - 1:30pm **(Virtual)**

Cayuse Proposal System,
2:00pm – 3:30pm **(Virtual)**

February 15th
Post-Award & Compliance Part 1,
12:30pm – 3:00pm **(Virtual)**

February 17th
Post-Award & Compliance Part 2,
9:30am – 12:00pm **(Virtual)**

March 8th
Cayuse Proposal System,
9:00am – 10:30am **(Virtual)**

March 10th
Basic Certification Workshop,
9:00am - 1:30pm **(Virtual)**

eRouting Proposal Module,
2:00pm – 3:30pm **(Virtual)**

March 22nd
2 CFR 200 Workshop,
9:00am – 4:00pm **(Virtual)**

March 29th
Internal Controls Workshop,
9:00am – 3:00pm **(Virtual)**

GT Georgia Tech

Sponsor System Updates

eRA Commons: Log-in Using the Federated Account (GT SSO) Option

Steps

- **Step 1:** Head to the main eRA Commons login page at: https://public.era.nih.gov/commonsplus/public/login.era

- **Step 2:** Using the Option **Login with Federated Account** (as seen below), begin searching for the Georgia Institute of Technology.
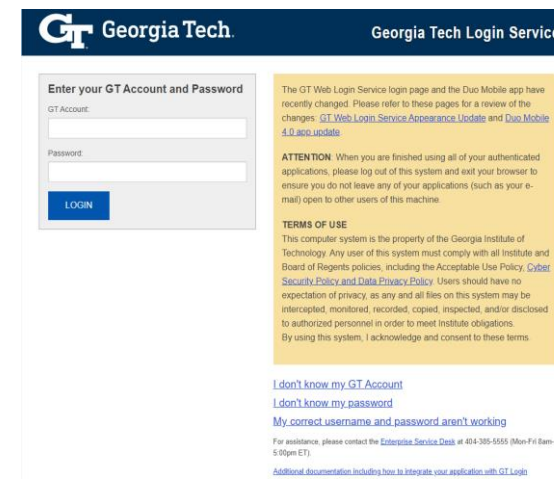
Steps

- **Step 3:** Once the entire name of Georgia Institute of Technology populates, click Login

- **Step 4:** After clicking Login, you will be directed to the Georgia Tech Login Service (SSO) page that you are familiar with seeing (unless you are already signed in via SSO).

Log in using your GT credentials.

Success!

- After verifying your eRA Commons Credentials, you should then be taken directly into eRA Commons upon successful login.

- For additional assistance:

See [eRA Commons: Federated Institutions/Organizations](#)

or

Contact training@osp.gatech.edu

ProposalCentral Updates

ProposalCentral

- We purchased Proposal Central Plus for institutional grants management, allowing for additional features for institution officials, including:

  - Early access to proposals

  - Alerts for new applications

  - Greater visibility and control

- Required us to clean-up system profiles:

  - Appropriate roles/access

  - Removing unaffiliated individuals
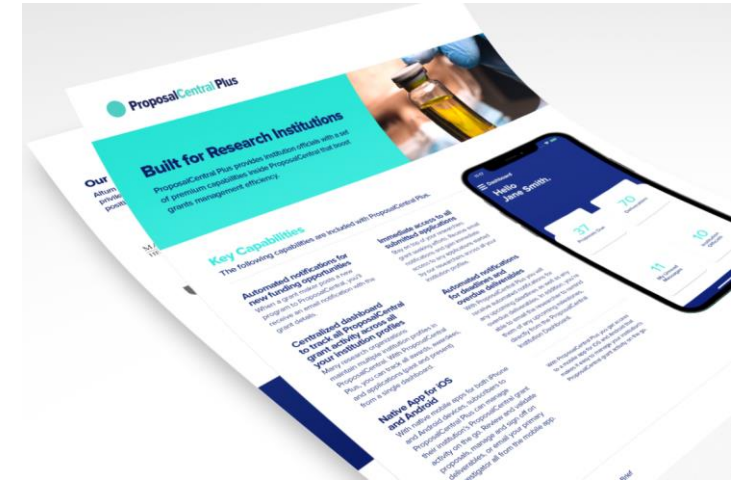
Key Capabilities

The following capabilities are included with ProposalCentral Plus.

Automated notifications for new funding opportunities

When a grant maker posts a new program to ProposalCentral, you'll receive an email notification with the grant details.

Centralized dashboard to track all ProposalCentral grant activity across all your institution profiles

Many research organizations maintain multiple institution profiles in ProposalCentral. With ProposalCentral Plus, you can track all awards, awardees, and applications (past and present) from a single dashboard.

Native App for iOS and Android

With native mobile apps for both iPhone and Android devices, subscribers to ProposalCentral Plus can manage their institution's ProposalCentral grant activity on the go. Review and validate proposals, manage and sign off on deliverables, or email your primary investigator all from the mobile app.

Immediate access to all submitted applications

Stay on top of your researchers grant seeking efforts. Receive email notifications and gain immediate access to any applications started by our researchers across all your institution profiles.

Automated notifications for deadlines and overdue deliverables

With ProposalCentral Plus you will receive automated notifications for any upcoming deadlines as well as any overdue deliverables. In addition, you're able to email the researcher to remind them of any upcoming milestones, directly from the ProposalCentral Institution Dashboard.

With ProposalCentral Plus you get access to a mobile app for iOS and Android that makes it easy to manage your institution's ProposalCentral grant activity on the go.

Georgia Tech
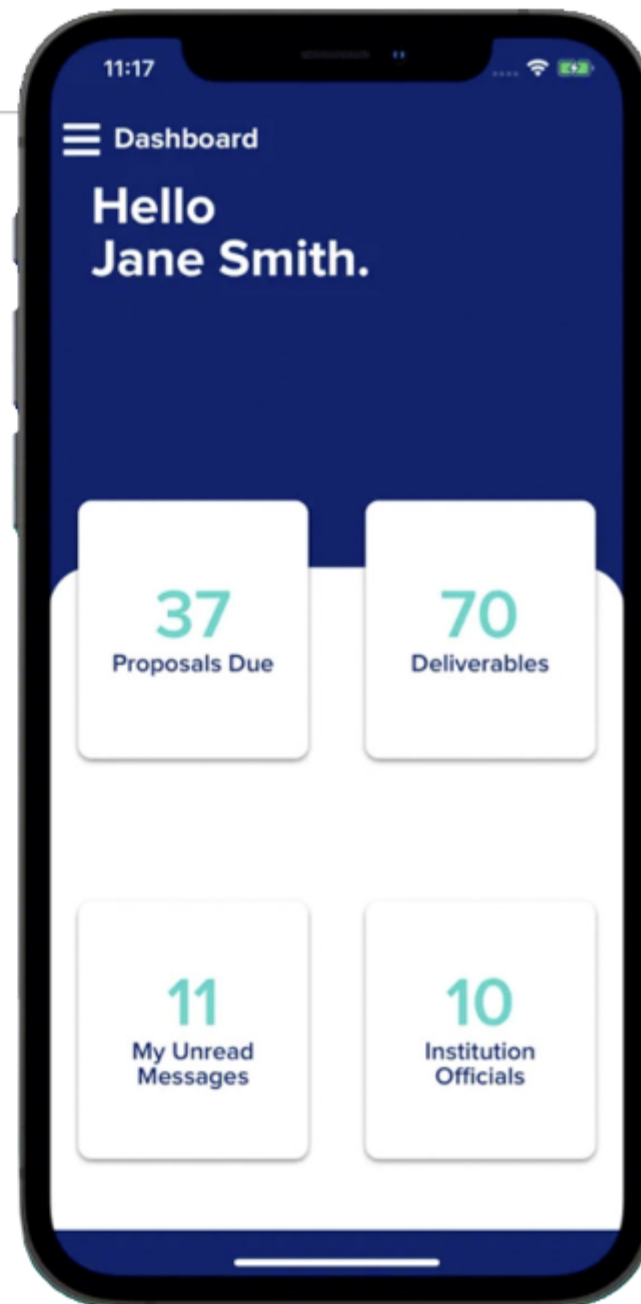
ProposalCentral Institution Official Roles

- PI – approved researcher able to create application and submit to sponsor after approval received by Signing Official

- Signing Official - who reviews your researchers application and is your Institution signature to allow your researcher to submit

- **Financial Officers** - submit any financial documentation once the researcher has been awarded and financial reports are due

- Grant Officer - typically the Grants Officer manages the award, making sure the PI submits all requested deliverables.

  - Their access to submit deliverables is usually restricted to the Progress Report, and any other administrative deliverables like Pre-Award documents.

Save-the-Date

Research Administration Buzz – Quarterly Meetings
11:00am – 1:00pm

January 19th

Special Speaker: Dr. Abdallah, EVPR
Agency and policy updates from all central units

You were sent a calendar invitation so it will be

on your calendar if you choose to accept.

Georgia Tech

QUESTIONS?

Email us at

training@osp.gatech.edu

Deanna Hendrickson, CRA

Research Education & Outreach Manager

Lee Broxton, M.Ed.

Training Specialist

Elizabeth Omiteru, MCSE, Ed.D

Training Specialist

Georgia Tech

THANK YOU!

GRANTS.GATECH.EDU

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