

# The Latest Buzz with G&C Accounting

Tuesday, December 12, 2023  
1:00 – 2:00 PM



# Agenda

Topic	Presenter(s)
Welcome, Post Award Research Updates	Josh Rosenberg
Commitment Accounting Updates	Jason Cole
Project Accounting Updates	Glenn Campopiano
Workday Budget Walkthrough-Where to Find (Demo)	Sarah Kelsey
Cost Accounting Updates	Jonathon Jeffries
Workday and Reporting Updates	Amy Zhang
Training Updates	Rob Roy
Closing	Josh Rosenberg

# Post Award Research Updates

**Josh Rosenberg**

Exec. Director, Grants and Contracts

# RI Sponsored Programs

*AWARD DATA: FY20 – 24 (YTD through Period 5: November)*

<b>AWARDS: Cumulative Report thru: NOV.</b>					
College/Unit	FY24		FY23		Award Dollar Variance
	Awarded Amount	Awards	Awarded Amount	Awards	
COMP	\$ 21,323,879	86	\$ 25,909,275	77	-17.7%
COS	\$ 35,923,020	153	\$ 26,781,755	144	34.1%
DSGN	\$ 4,747,548	258	\$ 7,116,330	231	-33.3%
ENGR	\$ 168,745,331	545	\$ 155,307,720	579	8.7%
GTRI	\$ 417,334,832	453	\$ 360,495,296	413	15.8%
IAC	\$ 4,423,945	27	\$ 5,285,363	35	-16.3%
OTHERS	\$ 44,334,769	173	\$ 57,336,184	148	-22.7%
SCB	\$ 540,974	5	\$ 638,207	5	-15.2%
<b>Total</b>	<b>\$ 697,374,298</b>	<b>1,700</b>	<b>\$ 638,870,129</b>	<b>1,632</b>	<b>9.2%</b>
<b>Resident Instruction and Other</b>	<b>\$ 280,039,466</b>	<b>1,247</b>	<b>\$ 278,374,834</b>	<b>1,219</b>	<b>0.6%</b>

## Key Takeaways:

- Awards for Georgia Tech totaled \$697.4 million.
- On the RI side, awards increased 0.6% to \$280.0 million.
- Increases in funding from DHHS (ARPA-H award) and colleges/universities helped to offset decreases in Department of Commerce and industry sponsor awards.
- With 7 months to go in the fiscal year, I continue to project flat award growth on the RI side and will revisit in Q3.

<b>Awards</b>		
	YTD (Nov.)	Full Year
FY24	\$ 280,039,466	\$ 512,798,649
FY23	\$ 278,374,834	\$ 512,798,649
FY22	\$ 248,616,643	\$ 443,169,708
FY21	\$ 209,532,905	\$ 415,738,536
FY20	\$ 188,221,144	\$ 402,520,391

# RI Sponsored Programs

## SPONSOR AWARD DATA: FY23 – 24 (YTD through Period 5: November)

RI NEW AWARDS (Through November)						
Federal Agency or Sponsor Type	FY24	% of RI Portfolio	FY23	24 v. 23 \$ Variance	24 v. 23 % Variance	5 Year Avg
NATIONAL SCIENCE FOUNDATION (NSF)	\$ 74,187,985	26%	\$ 72,963,743	\$ 1,224,242	2%	\$ 62,171,798
DHHS	\$ 40,675,542	15%	\$ 28,908,003	\$ 11,767,539	41%	\$ 28,660,362
COLL/UNIV/RES INSTITUTES	\$ 32,745,978	12%	\$ 20,756,848	\$ 11,989,129	58%	\$ 23,387,095
US DEPT OF ENERGY	\$ 25,385,785	9%	\$ 18,546,491	\$ 6,839,294	37%	\$ 21,154,222
INDUSTRIAL SPONSORS	\$ 20,619,516	7%	\$ 28,789,426	\$ (8,169,910)	-28%	\$ 24,655,529
US DEPT OF COMMERCE	\$ 14,671,594	5%	\$ 25,742,436	\$ (11,070,842)	-43%	\$ 11,482,543
INDUS RES INST/FDNS/SOC	\$ 13,461,768	5%	\$ 16,247,344	\$ (2,785,576)	-17%	\$ 15,678,674
NASA	\$ 12,020,612	4%	\$ 8,539,627	\$ 3,480,985	41%	\$ 8,979,455
ARMY	\$ 9,178,463	3%	\$ 9,560,933	\$ (382,470)	-4%	\$ 5,021,715
NAVY	\$ 8,574,572	3%	\$ 9,705,109	\$ (1,130,537)	-12%	\$ 6,407,062
AIR FORCE	\$ 6,786,326	2%	\$ 7,785,623	\$ (999,297)	-13%	\$ 5,046,039
GOVT-OWNED/CONTRACTOR OP	\$ 4,670,586	2%	\$ 4,037,264	\$ 633,322	16%	\$ 4,131,441
US DEPT OF DEFENSE	\$ 4,576,568	2%	\$ 4,001,133	\$ 575,435	14%	\$ 4,511,225
STATE & LOCAL GOVERNMENT	\$ 2,260,246	1%	\$ 5,867,321	\$ (3,607,075)	-61%	\$ 4,349,570
ENVIRONMENTAL PROTECTION AGENCY	\$ 2,123,000	1%	\$ 1,099,999	\$ 1,023,001	93%	\$ 866,141
<b>Grand Total</b>	<b>\$ 280,039,466</b>	<b>100%</b>	<b>\$ 278,374,834</b>	<b>\$ 1,664,632</b>	<b>0.6%</b>	<b>\$ 243,044,215</b>

### Key Takeaways:

- Top 15 sponsor types/agencies by award dollars in FY24 listed above; totals at the bottom reflect awards from all sponsors.
- As noted earlier, the biggest decrease is from the Department of Commerce (\$25.7 million in awards in FY23 versus \$14.7 million in FY24). DHHS and Colleges/Universities/Research Institutes were the biggest areas of growth.

# RI Sponsored Programs

*EXPENSE DATA: FY20 – 24 (YTD through Period 5: November)*

<b>Expenditure Analysis: NOV.</b>	<b>FY24 YTD</b>	<b>FY23 YTD</b>	<b>Change</b>
Salaries and Wages	\$ 60,365,393	\$ 56,896,953	6.1%
Subcontracts	\$ 30,109,278	\$ 21,968,883	37.1%
Tuition Remission	\$ 13,840,395	\$ 13,599,233	1.8%
Other Direct Costs	\$ 16,570,866	\$ 13,270,052	24.9%
M&S	\$ 12,265,651	\$ 12,595,924	-2.6%
Fringe Benefits	\$ 12,069,457	\$ 11,017,415	9.5%
Equipment	\$ 6,093,764	\$ 5,397,561	12.9%
Domestic Travel	\$ 2,991,136	\$ 2,732,108	9.5%
Foreign Travel	\$ 863,701	\$ 742,147	16.4%
High Performance Computing	\$ 41,375	\$ 30,791	34.4%
Unallocated	\$ 138,822	\$ 6,229	2128.7%
<b>DIRECT</b>	<b>\$ 155,349,835</b>	<b>\$ 138,257,298</b>	<b>12.4%</b>
<b>IDC</b>	<b>\$ 46,948,861</b>	<b>\$ 42,748,028</b>	<b>9.8%</b>
<b>Total</b>	<b>\$ 202,298,695</b>	<b>\$ 181,005,325</b>	<b>11.8%</b>

<b>Expenditures - Direct</b>		
	YTD (Nov.)	Full Year
FY24	\$ 155,349,835	\$ 379,068,111
FY23	\$ 138,257,298	\$ 337,688,551
FY22	\$ 141,934,130	\$ 330,920,330
FY21	\$ 116,750,805	\$ 294,248,586
FY20	\$ 115,895,209	\$ 286,744,676
<b>Expenditures - Indirect</b>		
	YTD (Nov.)	Full Year
FY24	\$ 46,948,861	\$ 112,081,121
FY23	\$ 42,748,028	\$ 103,856,777
FY22	\$ 39,484,764	\$ 93,079,082
FY21	\$ 35,081,791	\$ 86,156,912
FY20	\$ 36,663,736	\$ 84,764,909

Key Takeaways:

- Direct expenditures were up 12.4% and indirect expenditures were up 9.8% YOY.
- Relative increases in all areas except M&S.

# RI Sponsored Programs

## Grants and Contracts *INVOICING* and *FINANCIAL REPORTING* FY23 – FY24 (YTD through Period 5: November)

<b>INVOICING</b>			
<b>Invoicing YTD FY2023 vs. FY2024 (thru Nov.)</b>			
Invoice Types	FY24 (Nov. YTD)	Monthly FY24 Average	FY23 (Nov. YTD)
G&C GIT Standard	\$ 10,000	\$ 2,000	\$ 391,076
G&C GIT Standard Certification Required	\$ 8,479,934	\$ 1,695,987	\$ 235,782
G&C GTRC Custom Certification Required	\$ 803,364	\$ 160,673	\$ 1,587,116
G&C GTRC Standard	\$ -	\$ -	\$ 11,514,663
G&C GTRC Standard Certification Required	\$ 59,347,198	\$ 11,869,440	\$ 35,568,473
G&C In House	\$ 12,680,940	\$ 2,536,188	\$ 21,972,740
G&C LOC Draw	\$ 80,832,560	\$ 16,166,512	\$ 75,282,100
G&C SF1034	\$ 8,993,747	\$ 1,798,749	\$ 4,882,351
G&C SF 270	\$ 24,219,236	\$ 4,843,847	\$ 23,033,472
<b>Grand Total</b>	<b>\$ 195,366,979</b>	<b>\$ 39,073,396</b>	<b>\$ 174,467,773</b>
<b>Raw Invoice Counts</b>	<b>6,806</b>	<b>1,361</b>	<b>5,432</b>
<b>Year over Year Invoicing Change</b>			
	<b>Dollars</b>	<b>Invoice Counts</b>	
YTD change in FY24 over FY23	<b>\$ 20,899,206</b>	<b>1,374</b>	
YTD percentage change	<b>12.0%</b>	<b>25.3%</b>	

<b>FINANCIAL REPORTS</b>		
<b>Financial Reports YTD FY20223 vs. FY2024 (thru Nov.)</b>		
Report Types	FY24 (Nov. YTD)	FY23 (Nov. YTD)
Annual Financial Report	48	55
Final Financial Report	86	100
Monthly Financial Report	78	79
Quarterly Financial Report	279	255
Milestone (Event Based)	1	2
Semi-Annual Financial Report	16	25
<b>TOTALS</b>	<b>508</b>	<b>516</b>
<b>Year over Year Invoicing Change</b>		
	<b>Report Counts</b>	
YTD change in FY24 over FY23	<b>(8)</b>	
YTD percentage change	<b>-1.6%</b>	

### Notes:

- Invoiced dollars (and counts) up considerably over the prior year.
- RPA “bots” continue to function well on both the invoicing and reporting side.

# RI Sponsored Programs

## Grants and Contracts: FINANCIAL ANALYSIS: FY23 – FY24 (YTD through Period 5: November)

G&C ANALYST TEAM: JOURNALS	FY24	% of Total	FY23	% of Total	% Chg FY
<b>Journals (Total)</b>	552		640		-14%
Appropriate Grants Management	416	75%	498	78%	
"Red Flag" Grants Management	136	25%	142	22%	

*Appropriate Grants Management: F&A adjustments, accounting adjustments, in-kind cost sharing, month-end entries, audit, blank object class, tuition correction, equipment entries.*

*"Red Flag" Grants Management: Primarily prior year Salary and Planning Distribution (SPD) transfers, past term/overages.*

### Key Takeaways:

- The statistics on journals show an 14% decrease relative to last year, although there is a slight increase in “red flag” journals as a percentage of the total.
- Independent of journal activity through November, the analyst team managed:
  - 555 award initiations,
  - 1,147 award modifications,
  - 2,502 award corrections, and
  - 180 service now tickets.

# RI Sponsored Programs

## Award Dollars in Exception Status

<b>AWARD EXCEPTIONS (Overspent) - as of December 1</b>			
Row Labels	Past-term	In-Performance	Grand Total
Financial Aid	(1,479,804)	(23,214,113)	(24,693,917)
Electrical and Computer Engineering	(632,665)	(3,052,742)	(3,685,407)
General Institutional Expense	(467,191)	(324,278)	(791,469)
EI2 Safety, Health, Environmental Services	(343,555)		(343,555)
Center for Education Integrating Science, Mathematics & Computing (CEISMC)	(216,538)		(216,538)
Chemistry and Biochemistry	(170,611)	(510,893)	(681,504)
Mechanical Engineering	(98,961)	(2,806,484)	(2,905,446)
Institute for Bioengineering & Bioscience	(95,178)	(7,910)	(103,088)
School of Computer Science	(78,273)	(128,778)	(207,051)
Industrial And Systems Engineering	(73,847)	(260,436)	(334,282)
School of Interactive Computing	(65,859)	(367,887)	(433,746)
Chemical and Biomolecular Engineering	(52,443)	(1,125,165)	(1,177,608)
GT/Emory Biomedical Engineering	(38,487)	(1,677,763)	(1,716,251)
Aerospace Engineering	(33,786)	(2,217,006)	(2,250,792)
Materials Science and Engineering	(26,178)	(833,378)	(859,555)
<b>Grand Total</b>	<b>(3,983,840)</b>	<b>(41,808,852)</b>	<b>(45,792,692)</b>
<b>Non-Financial Aid</b>	<b>(2,504,036)</b>	<b>(18,594,739)</b>	<b>(21,098,775)</b>

### Key Takeaways:

- This data represents awards where actual spending plus obligations and commitments exceeds the current budget.
- The biggest risk area is dollars associated with “past-term” awards (the end date has passed).
- The three exception reports are for awards, grants, and cost sharing. This information is now being provided in three ways:
  - Each month at the beginning of the month, Grants and Contracts provides them to unit financial managers AND now to department chairs.
  - The reports are available on LITE.
  - Our Exception Report BOT is now in place, where PIs and grant administrators are automatically emailed twice a month to inform them about the exceptions and for them to review (and take action if needed).

# Education

<https://www.grants.gatech.edu/pi-articles>

[PI ARTICLE: The PI “Must-Knows” of Post Award Financial Management.](#) (November, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Cost Principles – Research Administration’s Big Four.](#) (October, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Research Proposal Submissions – Don’t Needlessly Miss Your Flight.](#) (September, 2023) [\(PDF Download\)](#)

[PI ARTICLE: A Celebration of Georgia Tech Research.](#) (August, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Audits and Reviews.](#) (July, 2023) [\(PDF Download\)](#)

[PI ARTICLE: A Summer Salary Briefing.](#) (June, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Exception Reports and the Importance of Sponsored Budget Management.](#) (May, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Cost Transfers – Manageable Problems.](#) (April, 2023) [\(PDF Download\)](#)

[PI ARTICLE: The Craft of Carryover.](#) (March, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Participant Support Costs versus Participant Incentives.](#) (February, 2023) [\(PDF Download\)](#)

[PI ARTICLE: The Problems with Overspending on Sponsored Awards.](#) (January, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Popular Research Metrics.](#) (December, 2022) [\(PDF Download\)](#)

[PI ARTICLE: Cost Sharing – Nuts and Bolts.](#) (November, 2022) [\(PDF Download\)](#)

[PI ARTICLE: An Inventory of Sponsor Required Reports.](#) (October, 2022) [\(PDF Download\)](#)

[PI ARTICLE: How do Fringe Benefit Rates work at Georgia Tech?](#) (September, 2022) [\(PDF Download\)](#)

[PI ARTICLE: The Mysterious and Very Important F&A Cost Reimbursement Rate.](#) (August, 2022) [\(PDF Download\)](#)

[PI ARTICLE: Subrecipient Monitoring – Roles and Responsibilities.](#) (July, 2022) [\(PDF Download\)](#)

[PI ARTICLE: OSP and G&C – Who Does What?](#) (June, 2022) [\(PDF Download\)](#)

[PI ARTICLE: How Much Money Do I Have?](#) (May, 2022) [\(PDF Download\)](#)

[PI ARTICLE: Sponsored Award Management – Timeline and Tasks.](#) (Apr, 2022) [\(PDF Download\)](#)

[PI ARTICLE: My sponsor says they haven’t been invoiced.....so what do I do?](#) (Mar, 2022) [\(PDF Download\)](#)

<https://www.grants.gatech.edu/latest-buzz-gc-accounting>

## The Latest Buzz with G&C Accounting

### The Latest *Buzz* with G&C Accounting



Grants and Contracts (G&C) Accounting is hosting a monthly information session to provide post award research news and updates to the Georgia Tech research community. Our next session will be held virtually on December 12. Please register for the session [using the link below](#). If you would like to view our past session please navigate to our website: [grants.gatech.edu](https://www.grants.gatech.edu) -> Training -> The Latest Buzz with G&C Accounting. We look forward to seeing you!

[Link to Register.](#)

**November 27, 2023**

For [Presentation Slides \(PDE\)](#),

For [Recorded Session](#).

Topic	Presenter	Recording start
Research Stats, RI Sponsored Programs, PI Articles	Josh Rosenberg	0:00:31
Keys to Success: Change Position Funding, EDR Processing, EDR Justifications, > 90 Day EDR Justification	Jason Cole	0:07:28
Robotic Process Automations (RPA), Exception Reports in Relation to Close Out of Awards, Other issues delaying closeouts, Contract Information System (CIS), Monthly Office Hours	Glenn Campopiano	0:11:46

# Commitment Accounting Updates

**Jason Cole**

Interim Director - Commitment Accounting

## > 90 Day EDR Justification

- **Only applies to EDRs when moving salary on to 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?](#)

# Over 90 Day Transmittal Form

Georgia Institute of Technology  
OVER 90 DAYS LATE EXPRESS DIRECT RETRO (EDR) TRANSMITTAL FORM

Dept/Org Number  Dept / Org Name   
Employee Name  Employee ID #

### Contact/Approval Information

Requested By:	<input type="text"/>	Title:	<input type="text"/>
Date:	<input type="text"/>	Phone:	<input type="text"/>
	<input type="text"/>	Email:	<input type="text"/>
Approved By:	<input type="text"/>	Date:	<input type="text"/>
Approved By: (if shared)	<input type="text"/>	Date:	<input type="text"/>
		Dept ID	<input type="text"/>
Approved By: (if shared)	<input type="text"/>	Date:	<input type="text"/>
		Dept ID	<input type="text"/>
	<input type="checkbox"/> Current FY	<input type="checkbox"/> Prior FY	

### JUSTIFICATION DETAIL

*NOTE: For all changes made TO externally-funded sponsored projects\*\*, you must choose a justification reason. If "Other" is selected, enter detailed explanation.*

1. Correction of labor charges based on review by employee, PD/PI, or authorized delegate.
2. Correction of clerical error or data input identified by authorized unit financial personnel.
3. New Award costs incurred during the award period charged temporarily to other allowable funds pending establishment of a new award/fund.
4. Allowable pre-award costs (incurred prior to the award period) initially charged to other allowable funds.
5. Renewal award costs charged originally to prior sponsored increment or to other allowable funds.
6. Other: Please specify:

### JUSTIFICATION FOR LATE TRANSFER (Complete this section for requests over 90 days) \*\*

Pay Period End Date  Date of Request:  Days Late:

(a) Explain why the expense was not originally charged to the correct project.

(b) Explain how the expense benefits the scope of work on the "TO" project. What work did the employee perform?

(c) Explain why the error was not identified and corrected timely (within 90 days of the Pay Period End date).

(d) Explain what steps are in place to prevent the need for a late cost transfer going forward. Include people/groups involved and frequency

# Project Accounting Updates

**Glenn Campopiano**

Director, Project Accounting

# Project Accounting Updates

## Award closeout timeline

- 90 days before end date- review for cost share, overruns, future obligations that need adjustment, get any expenses posted, fabrications to equipment should be completed or in process.
- 1 to 30 days after end date – Unit should be making final adjustments like EDR or posting any expenses that were incurred during POP but not yet booked. Clear open obligations. All travel should be posted.
- 31-60 days after end date – time allowed for final subaward invoices to be processed. All obligations should be closed.
- 61-120 days after end date – G&C issues final invoice and submits financial reports and inactivates award in WD. Unit should insure all deliverables and programmatic reports have been submitted.

# Project Accounting Updates

## Equipment defined-

- Equipment means tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by the non-Federal entity for financial statement purposes, or \$5,000.
- Be sure to use correct spend codes when buying equipment.
- Who holds title to equipment? GIT or sponsor. Check T&Cs in CIS.
- Be sure to have it tagged and inventoried (Property Control Dept)
- If it belongs to sponsor – what is disposition at end of award?
- Are you fabricating equipment? Be sure to convert M&S to Equipment as required. A separate grant can help segregate costs.

# Project Accounting Updates

- OSP budget requests to Departments
- G&C cannot invoice over the current funded value in CIS.
- If you are getting more funds and OSP asks for a budget please provide timely as it hold up invoicing for any expenses posted in excess of the current funded amount.
- All mods with funding increases need budgets. Delays in providing hold up the contracting process and the invoicing.

# Project Accounting Updates

Merry Christmas  
and  
Happy New Year!

# Workday Budget Walkthrough- Where to Find (Demo)

**Sarah Kelsey**

Financial Analyst II

# Workday Budget Walkthrough-Where to Find (Demo) Video Link

- [https://mediaspace.gatech.edu/media/Workday+Budget+Walkthrough-Where+to+Find+%28Demo%29+-+December+2023+Buzz/1\\_ol4efdy2](https://mediaspace.gatech.edu/media/Workday+Budget+Walkthrough-Where+to+Find+%28Demo%29+-+December+2023+Buzz/1_ol4efdy2)

# Cost Accounting Updates

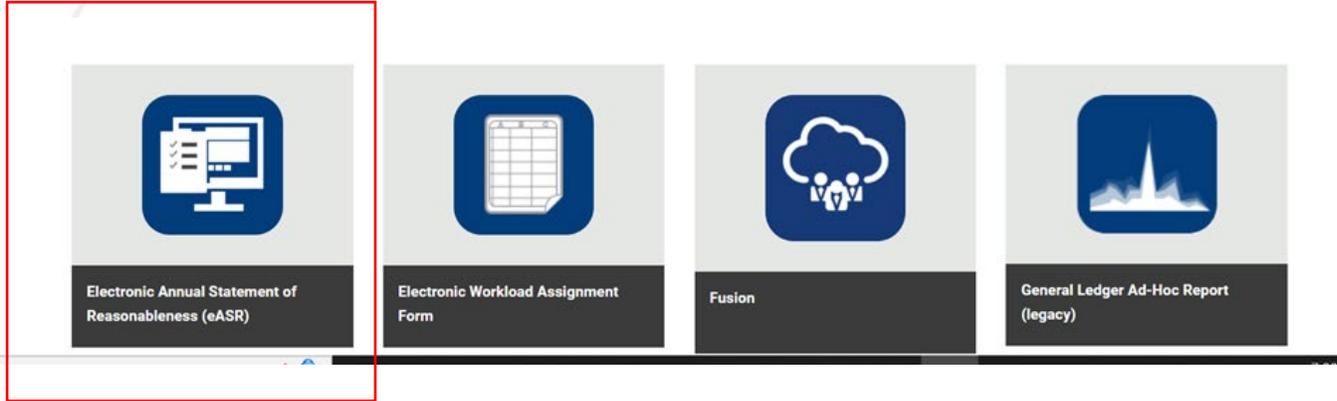
**Jonathon Jeffries**

Director - Cost Accounting

# Annual Statement of Reasonableness

- 651 (10%) FY23 ASRs still need employee confirmation as of Friday, December 8<sup>th</sup>
- 82 ASRs approved by employee still require Unit Financial Manager approval
- Hourly employees working on Grants require an annual ASR
- Reports on WAF page can produce a list of outstanding employees by either metric
- Questions on process or reports please call me or email [ear.ask@office365.gatech.edu](mailto:ear.ask@office365.gatech.edu)
- Manager

# ASRs – UFM Approvers and Reports via TechWorks



eASR Menu Date/Time: 12/08/2023 07:09:53 AM Database: Production User: jj186

GEORGIA Institute of TECHNOLOGY

## electronic Annual Statement of Reasonableness (eASR)

eASR Confirmation by Employee
eASR Certification by UFM
eASR Status Report
Manual ASR Form
eASR Confirmation by Employee - View Only
eASR Manual Deptid Entry
eASR Administration

Logout

If you have any questions or comments about this site, please email [eamr.ask@business.gatech.edu](mailto:eamr.ask@business.gatech.edu)

# ASRs – UFM Approvers and Reports via TechWorks

GEORGIA Institute of TECHNOLOGY

## eASR Status Report

Please enter one or more of the following:

Fiscal Year:

DeptID:

Employee ID:

Employee Confirmation Status:  All  Confirmed  Awaiting Confirmation

UFM Certification Status:  All  Certified  Awaiting Certification

# FY24 ASRs for Employees Terminating

- <https://lite.gatech.edu/> -> HCM -> Terminating Employee ASR
- Allows completion of ASR after termination has been entered into OneUSG and final payroll has posted
- Valid if no future changes to salary distribution prior to final ASRs being produced at year end
- Access questions [earr.ask@office365.gatech.edu](mailto:earr.ask@office365.gatech.edu)

The screenshot shows the 'Georgia Tech Enterprise Reporting' interface for 'Terminating Employee ASR'. The page title is 'Annual Statement of Reasonableness for Salary Charges'. The interface includes a search bar, a navigation menu, and a main content area with three search filters: 'Fiscal Year', 'Employee Name', and 'EMPLID'. Each filter has a search input field and a search button. The 'Fiscal Year' filter is currently set to '2024'. The 'Employee Name' and 'EMPLID' filters show 'No Results'.

Georgia Tech Enterprise Reporting | Terminating Employee ASR

1/2 Alerts | Maintenance: Note: No Maintenance Scheduled

Annual Statement of Reasonableness for Salary Charges

Fiscal Year

2020  
2021  
2022  
2023  
2024

Employee Name

Keywords: Input keywords here

No Results

EMPLID

Keywords: Input keywords here

No Results

# The Monthly WAF and Grant Management

- All Employees including GRAs and Student Assistants paid on sponsored funding (Grant Worktags) will receive a Workload Assignment Form (WAF) monthly via email. The WAF shows effort by worktag for the entire fiscal year both past and future pay periods.
- It is very important and a GT policy that employees review their WAF monthly
- Employees **must** report errors in their salary distribution to their Financial Staff and an EDR should be performed ASAP
- Please assist us by educating and informing employees including Faculty to review their WAF (effort) monthly, this could be part of your monthly grant management meetings
- Grant Administrators may find the Ad Hoc Salary report on LITE a useful tool to review salary information and avoid salary errors that require an EDR from happening and being discovered in the Electronic Workload Assignment Form (WAF)
- Improved salary management reduces audit risk, improves billing and financial reports, and avoid Cost Transfers

# Effort Reporting – Electronic Workload Assignment

Georgia Institute of Technology		Workload Assignment Report												
Home Dept: Name:	210-Electrical & Computer Engr Doe,John	Employee ID:	515151	Work Department: Title:	210-Electrical & Computer Engr Temp Research Engineer II	Fiscal Year: Month:	2010 August							
<b>INSTRUCTIONS:</b>														
This Workload Assignment Report has been provided for review, confirmation, and/or correction in accordance to Plan Confirmation System requirements.														
1. <b>REVIEW</b> the distribution of your salary to projects to determine if it accurately reflects your current and planned activities.														
2. <b>ERRORS.</b> Contact your departmental Financial Manager or click "Report A Change Or Issue" button at the bottom of this page if: <ul style="list-style-type: none"> <li>a. This workload distribution is not correct (deviates 5% or more from your actual effort).</li> <li>b. You are not familiar with one or more of the projects being charged for your effort.</li> </ul>														
3. <b>NO ERRORS.</b> Retain a printed or electronic copy of this Workload Assignment Report and any modifications.														
4. <b>QUESTIONS.</b> Contact Robert Ellington (894-3488), Grants and Contracts Accounting, if you need information about your responsibilities under the Georgia Tech Plan Confirmation System Requirements.														
<b>IMMEDIATELY CONTACT THE SPD CENTER AT <a href="mailto:SPD.ASK@BUSINESS.GATECH.EDU">SPD.ASK@BUSINESS.GATECH.EDU</a> OR (404) 894-3488 IF ERRORS THAT YOU REPORTED IN A PREVIOUS MONTH HAVE NOT BEEN CORRECTED.</b>														
Project	Sponsor	Project Title	Project Dates											
			Start	Term										
21003123		GRA.VL10.B12-Tepty/G-K Chang	07/01/09	06/30/10										
21065CA	GTF	EMINENT SCHOLAR CHAIR	08/21/87	06/30/09										
2106680	UNDESIGNATED	ELEC ENG UNDESIGNATED SPONSORED RESEARCH	07/01/98	06/30/20										
<b>ALERT: YOUR PERSONAL SERVICES DISTRIBUTION WAS UPDATED DURING THIS REPORT PERIOD. LAST UPDATE: 08-20-2009.</b>														
<b>Current Personal Services Distribution:</b>														
Project	Percent	Total	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
21003123	12.50	6,229.38	2,076.46	2,076.46	2,076.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
21065CA	37.50	18,688.14	2,076.46	2,076.46	2,076.46	4,152.92	4,152.92	4,152.92	0.00	0.00	0.00	0.00	0.00	0.00
2106680	50.00	24,917.52	0.00	0.00	0.00	0.00	0.00	0.00	4,152.92	4,152.92	4,152.92	4,152.92	4,152.92	4,152.92
<b>Total</b>	<b>100.00</b>	<b>49,835.04</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>	<b>4,152.92</b>
Report Run on 10/12/2009 at 02:32:30 PM														

# 2022 Higher Education Research and Development (HERD) Survey

- The FY 2022 data tables, including the FY 2022 rankings for all institutions, are available at <https://nces.nsf.gov/pubs/nsf24308>

## Higher education R&D expenditures, ranked by FY 2022 R&D expenditures: FYs 2010–22

(Dollars in thousands)

Institution	Rank	#	2018	2019	2020	2021	2022
Georgia Institute of Technology	17		891,728	960,167	1,048,988	1,114,481	1,231,485

## Higher education R&D expenditures, ranked by FY 2021 R&D expenditures: FYs 2010–21

(Dollars in thousands)

Institution	Rank	#	2017	2018	2019	2020	2021
Georgia Institute of Technology	20		804,301	891,728	960,167	1,048,988	1,114,481



Ángel Cabrera • 2nd

President at Georgia Institute of Technology

2d •

+ Follow ...

I'm very proud to report that [Georgia Institute of Technology](#) was once again listed as #1 research university in the nation among those w/o medical school (the third consecutive year) and #17 overall (our highest ever). This reflects the confidence of public and private sponsors in the caliber of our faculty, students, and staff to deliver results, advance science and technology, and improve the human condition [#ProgressAndService](#)

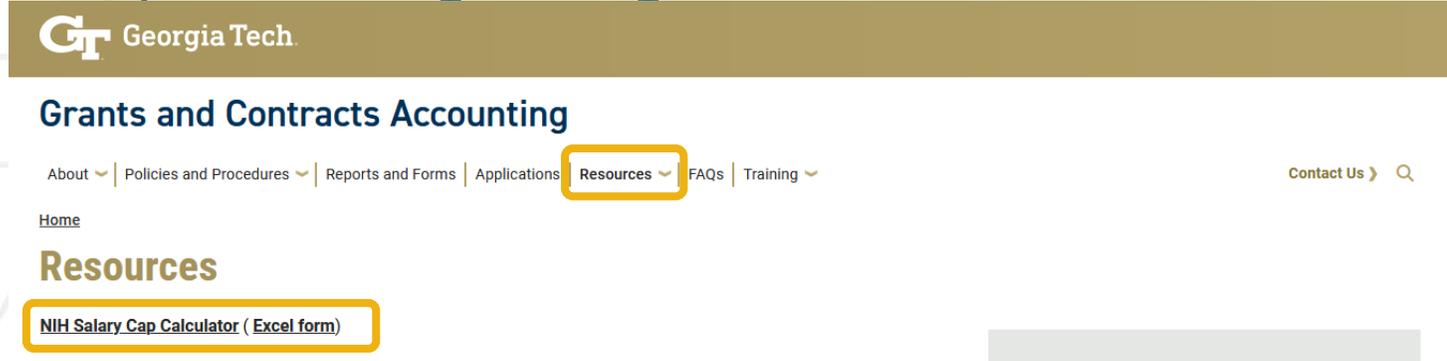
# Workday Reporting Updates

**Amy Zhang**

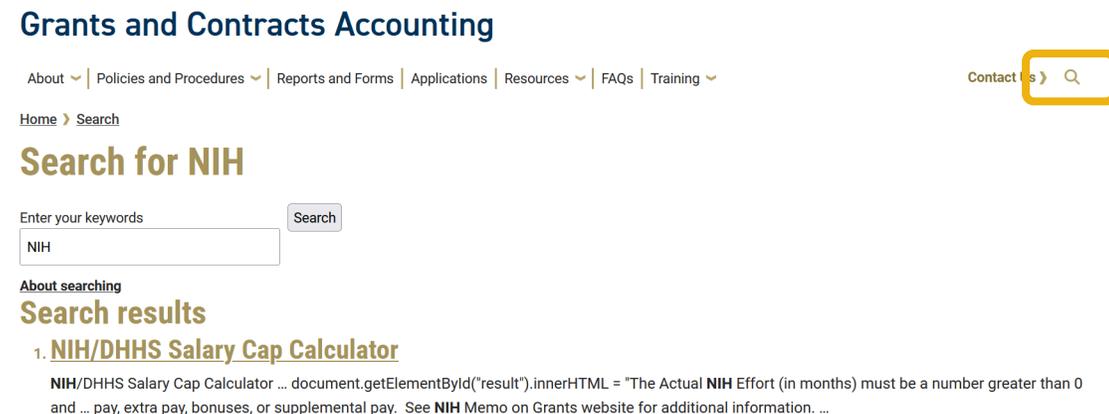
Application Support Analyst Lead

# NIH/DHHS Salary Cap Calculator (New)

- We have designed and created a web version NIH/DHHS Salary Cap Calculator
- <https://www.grants.gatech.edu/resources>



- You can search “NIH” or “Calculator” in any page of G&C website



# NIH/DHHS Salary Cap Calculator (New)

- The Calculator page features anchors that directly link to either the 9-month or 12-month calculator, as well as the Excel version



## Grants and Contracts Accounting

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### NIH/DHHS Salary Cap Calculator

[12 Month Salary](#) | [9 Month Salary](#) | [Download an Excel form](#)

#### 12 Month Salary

Enter the following data in a numeric form and press the button to calculate the Budget and Cost Share.

- 12 Month Salary should be the employee's 12 Month Institutional Base Salary. IBS does NOT include additional pay, extra pay, bonuses, or supplemental pay. See NIH Memo on Grants website for additional information.
- NIH Applicable Salary Cap should be the applicable NIH Salary Cap for the period. A historical list of the salary cap can be found [here](#).
- Actual NIH Effort (in months) should be the month(s) of effort that the employee works on a NIH Grant/Award during the Fiscal Year.

12 Month Salary \$:

NIH Applicable Salary Cap:

Actual NIH Effort (in months):

CALCULATE

12 Month Salary	\$
Monthly Rate	\$
NIH Applicable Salary Cap	\$
Actual NIH Effort (in months)	
Actual NIH Effort %	%
NIH Max Budget	\$ Maximum Monthly Amount on NIH awards
Effort Allocation on NIH Grant	% Effort charged to NIH awards
Required Effort on Cost Share Grant	% Over-the-cap effort charged to NIH Cost Share Grant
Amount Budgeted to NIH Cost Share	\$ Must be to Linked Cost Share Linked to NIH Award

The **Amount Budgeted to NIH Cost Share** represents the amount that must be Cost Shared to a linked NIH Cost Share Grant during the Fiscal Year and covered by the Department.



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- Actual NIH Effort (in months) should be the month(s) of effort that the employee works on a NIH Grant/Award during the Fiscal Year.

12 Month Salary \$:

NIH Applicable Salary Cap:

Actual NIH Effort (in months):

CALCULATE

12 Month Salary	\$ 250000
Monthly Rate	\$ 20833
NIH Applicable Salary Cap	\$ 199300
Actual NIH Effort (in months)	2
Actual NIH Effort %	16.7%
NIH Max Budget	\$ 33217 Maximum Monthly Amount on NIH awards
Effort Allocation on NIH Grant	13.3% Effort charged to NIH awards
Required Effort on Cost Share Grant	3.4% Over-the-cap effort charged to NIH Cost Share Grant
Amount Budgeted to NIH Cost Share	\$ 8450 Must be to Linked Cost Share Linked to NIH Award

The **Amount Budgeted to NIH Cost Share** represents the amount that must be Cost Shared to a linked NIH Cost Share Grant during the Fiscal Year and covered by the Department.

# Training Updates

**Rob Roy**

Director of BOR Sponsored Programs

# Current Professional Development Opportunities

[Saba Quest LMS](#) – Sign in with GT credentials and register!

Offered virtually, via Zoom, unless otherwise noted

Spring courses have been published to the LMS – Check out the Calendar & Learning Catalog!

## SELF-PACED / ON-DEMAND COURSES

- *Introduction to the Research Enterprise at GT*
- *What are GTRC and GTARC?*
- *Fun with the FAR*
- *DFUN with the DFARS*
- *NCURA: AI in Research Administration: Unlocking Efficiency and Innovation*
- *NCURA: NIH Data Management & Sharing Policy – Budgeting/Application Tips & Tricks (or Treat?)*
- *NCURA: Managing SBIR/STTR Projects*
- *NIH Proposal Preparation & Review Tips*
- *NIH F Series--Fellowship Programs*
- *NIH Fundamentals (NCURA)*
- *NSF Proposal Preparation & Review Tips*
- *Advanced Research Projects Agency for Health (ARPA-H):*
  - *Introduction and Q&A*
  - *Budget Workshop*
  - *Terms & Conditions Workshop*
- *Service Centers and Best Practices*
- *Specialized Service Agreements*
- *Subawards - Request, Monitor, Risk*
- *Effort Reporting*
- *Contract Information Systems (CIS)*
- *Cost Share*
- *Cost Transfers*
- *Pivot: Finding Funding*
- *ORCID iD*

RESEARCH ADMINISTRATION BUZZ

# RAB MEETING

January 8, 2024

Dalney 180 & Virtual

Lunch: 11:30am - 12:00pm

Event: 12:00pm - 2:00pm

[Saba Quest LMS](#) – Sign in with GT credentials and register!



# GT Certification Contact Hours & CEU credit



Approved by RACC  
to use for your  
CRA, CPRA, CFRA  
recertification  
hours!



# THANK YOU!



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