

# Process: Post-Award Management

For Spalding University



# Agenda

- ▶ Important notes
- ▶ To Do List: Primary Investigator
  - ▶ Projects Accounting
- ▶ To Do List: OSPRe
- ▶ To Do List: Finance Office

# Important notes for Primary Investigators/Project Directors:

- ▶ All grant or contract funds must be spent by the end of the project period (preferably a month before the deadline); Funds must be spent only on expenses related to the project and outline in the submitted budget
- ▶ Mark all deadlines - spending deadline and report deadline(s)
- ▶ Track expenditures through Projects Accounting; All projects set up in Projects Accounting by Finance
  - ▶ Projects Accounting meetings may be needed for PI's with multiple grants or contracts

# To Do List: Primary Investigator/Project Director (PI/PD)

When paying current employees /faculty:

- ▶ If employee receives additional pay: Complete an Memorandum of Agreement (MOA) and submit to Finance Office
  - ▶ Use MOA template to draft agreements for all necessary parties
  - ▶ Submit all MOAs and related information to Finance Department
    - ▶ After Finance Department review, MOAs must be approved by Supervisor/Department Chair
  - ▶ Send final, signed MOAs to Finance department to set up in payroll
- ▶ If an employee's status changes (for example, moving from part-time to full-time employment or increasing contract from 36-weeks to 40-weeks): Complete a Personnel Action Form (PAF)
- ▶ If course release is included: Update Employee contract and/or revise Faculty Workplan with department chair

# To Do List: Primary Investigator/Project Director (PI/PD)

## When Hiring new employee:

- ▶ Notify HR System Analyst to begin hiring process
- ▶ Complete a PAF upon hiring new employee
- ▶ Language for job posting: “This position is grant/contract funded and is contingent upon funding availability. This position may be shortened or extended based on funding and/or availability of work.”

## For student payments/support:

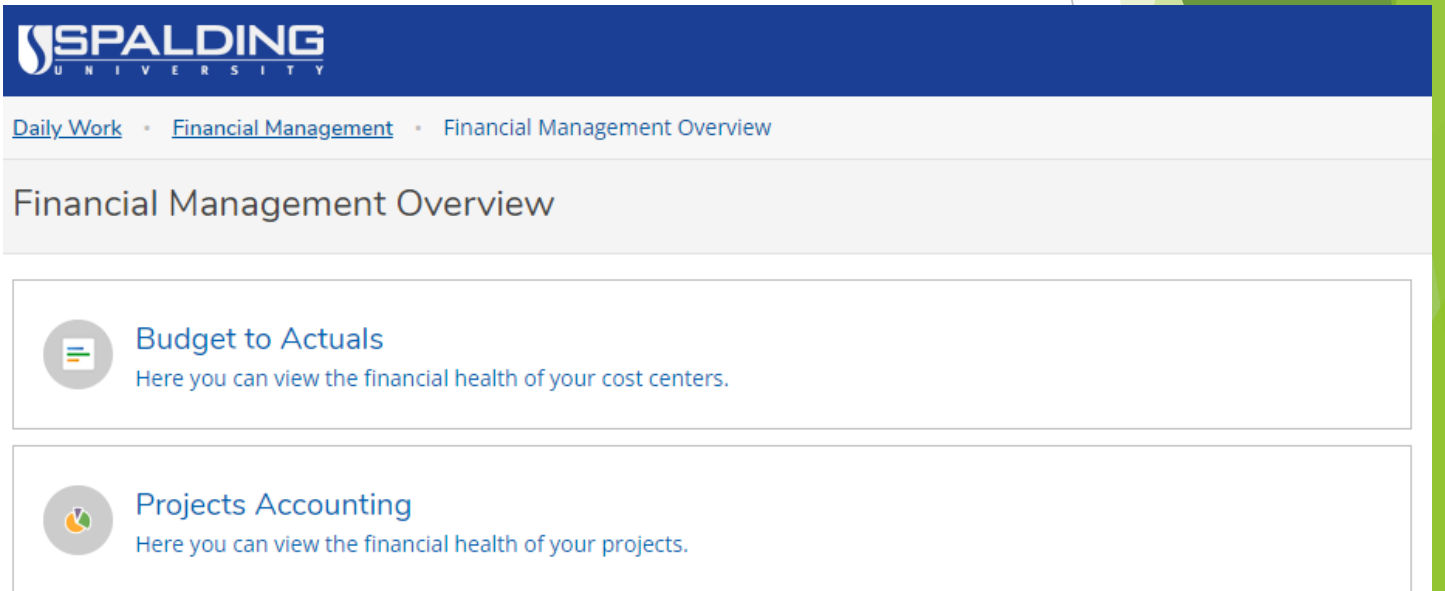
- ▶ Notify Financial Aid office of any student payments, tuition remission, or other support
- ▶ If a Graduate Assistant is paid by the grant: send information to Graduate Dean
- ▶ If students are paid a stipend by the grant: PI/PD creates MOA; Student completes W9 form and direct deposit set-up; All documents submitted to Finance office

# How to Use Projects Accounting

Datatel and Applications	Quicklinks
	OnBase
	Campus Labs
	Resource Scheduler
	Informer Reporting
	Issue a Student Retention Alert
	Anaplan
	Student Self-Service
	Syllabus Assistant
	Colleague UI
	<b>Budget Management</b>
	Paycom Employee
	Paycom Supervisor
	GoTo (Formerly Jive Phone)
	Ellucian CRM Advance
	Go To Meeting
	Microsoft Teams
	HD Meetings
	Slate
	Acadeum

## Projects Accounting:

<https://selfservice.spalding.edu/Student/ProjectsAccounting>



The screenshot shows the Spalding University logo at the top left. Below it is a breadcrumb trail: [Daily Work](#) · [Financial Management](#) · Financial Management Overview. The main heading is "Financial Management Overview". There are two main content boxes. The first box is titled "Budget to Actuals" and includes a small icon of a document with a bar chart. The text below the title says "Here you can view the financial health of your cost centers." The second box is titled "Projects Accounting" and includes a small icon of a pie chart. The text below the title says "Here you can view the financial health of your projects."

# To Do List: OSPRe

- ▶ Notify PI/PD (if award notification goes to Senior Grants Specialist)
- ▶ Notify President, Provost, and COO
- ▶ If grant agreement requires signature:
  - ▶ Grant agreement/Contract signature from University President
  - ▶ Return signed grant agreement to funder and request signed copy from funder
- ▶ Add reporting deadlines to master calendar
- ▶ Notify Marketing department if press release needed

# To Do List: Finance Office

- ▶ Create Project Account and send Project Accounting information to PI/PD
- ▶ Post-Award Budget Meeting
- ▶ Send MOA's to payroll





# Questions?

