DGA Roundtable – September 10, 2018

**1:30 – 2:30 pm, IRIC 305 (above the Atrium)**

Call-in Number: Zoom Join from PC, Mac, Linux, iOS or Android: <https://uidaho.zoom.us/j/9971473726>

– See Calendar Invite for additional details on zoom access.

Zoom: Please remember to mute your zoom microphone unless you are speaking.

IRIC participants: Please remember that side conversations during the discussions make it difficult for our off-campus and other zoom participants to hear and participate.

1. G**reetings and sign-in sheet**. Please sign in as you arrive or announce your arrival on Zoom!

* 1. Thank you all for attending!

1. October Meeting – cancelled. NCURA Regional Conference in Billings, MT.
   1. Joe C could co-host a pivot training in October but would prefer to wait until the OSP staff return from the research administration conference to be best prepared and present the relevant information with the OSP team. Would October 22nd work?

b. Kenwyn will re-send the library pivot training too.

1. **Chart V Discussion**
   1. Award Face Sheets: What do DGAs and PIs need to see?
      1. Currently – FOATEXT summary and screenshot of FRIGITD index(es).
      2. Asking for grant code, fund code, and index.
      3. Heather has added a note to ask for a constant cross-walk update into Banner 9 for reporting purposes to make pulling information easier.
      4. Subawards listing and amounts, and to whom.
      5. Cost share is on there, but need to add CS account code.
      6. Need to ensure that the budget screenshot and face-sheet are going together. Heather to speak with financial unit.
      7. Add PIs receiving funding as a listing on the award face-sheet. This is currently in the personnel tab in FRAGRNT.
   2. Multi-departmental grants: Single grant code (prefix will be main department), with indexes that roll to each department (if setup is requested in this manner or submitted via EIPRS in this manner). Financial Unit will work with primary departmental contact on closeouts.
   3. FWRITEM reports – by grant code only right now, but ‘by index’ is in the reports list for Argos.
      1. Argos = Transaction Detail Report (not by index yet either), but you can query by fund or ORGN and use a pivot table to sort data.
      2. Joe will share his pivot table for us to share to the DGA list.
   4. Budget roll – DONE! If you see errors or have questions, please contact OSP (Heather specifically). GL hasn’t rolled yet, but hopefully it will happen soon.
   5. New subawards in Chart V – new index with subaward dollars in 31 (and UI F&A in 60) for NEW subawards = no PO/req. In FRIGITD, remove ‘account’ before paging down to see dollars budgeted/expensed. Each subaward will have an account code, for expenses such as ES001 (= first subaward).
      1. **DGA is still responsible for ensuring that a GID exists with a valid W-9 (work with AP if a GID needs setup).**
      2. Existing subawards (continuations) will still expense to E7152 from category 30.
   6. Chart V- How to check deficits by line and index, and budget transfers– Kris. See PDFs. Cost Accounting uses FRIGITD (see pdfs) not BAVL.
   7. Multiple indexes for each fund (to add activity codes): This was brought up at the Chart V for Non-Finance Users training session(s). OSP is not currently doing this but we are open to explore this idea with you moving forward, if it will be useful. At setup, we establish a single index to each fund.
   8. Cost Share changes: we are working through this process and welcome your questions and suggestions. We will have more updates and instructions soon.
   9. Other: NSF check in documents (JV) points to BAVL but BAVL primary expense code changes make it useless. Can this be changed? Heather suggests using two banner screens and having FRIGITD open during the transactions.
   10. Kris is going to re-look at participant support and move the remainder of PS to 32. If you see issues, please let Cost Accounting know.
2. **Post Award Updates** – Sarah
   * 1. DGAs suggested an auto-response to sponsors and emails? Letting them know that we have it and are behind in processing.
3. **Pre Award Updates** – Ann-Marie
   * 1. OSPPI member list update.

If you are able, please attend the next faculty meeting for your department and ask your faculty to ensure that they are on the list to receive updates, funding opportunities, and the tip of the week. Email Ann-Marie or Heather to add them please.