

# DGA Roundtable

Tuesday, November 09, 2010  
8:54 AM

Open Forum day!

Handout= OSP Account List (attached)

Please let OSP know if any changes or additions need to be made to the account list.

Q: Returned checks came back on closed grants; now closed grants have a payment. How is the DGA supposed to handle that?

A: Probably need to do a revised final close.

A(1): Response after the meeting from Heather Nelson:

The OSP Financial Unit will handle any cancelled checks on closed accounts. If appropriate (e.g. if all funds were used) OSP will ask the DGA to check whether additional expenses were unable to post to the award originally and if so, allow a transfer on of those expenses. If not all funds were originally used then OSP will refund the amounts to the sponsors and send a revised financial report. Federal refunds that are very old (e.g. more than 5 years) will be returned to the US Treasury without any revised reporting.

Q: is there a place in Banner to see if a grant will be renewed/extended?

A: Check FOATEXT in Banner for notes; can access this by typing FOATEXT or through options while in FRAGRNT. Post award makes notes in FOATEXT for many items, including extensions. Another way is to look through the proposal to check to see what the PI requested. The award document also should contain information about the possibility of future funding or an extension.

Q: Can we go through FRAGRNT sometime/Banner walkthrough?

A: Next roundtable Kelly will bring projector and laptop to go through the screens. Also go through FTMFUND and FRMFUND to show how to find F&A rate.

Q: Can we see an FAQ about equation for finding out F&A rate (dollar amt/1.434 etc) and how to calculate a direct cost.

A: We'll send the equation out as an attachment and see about posting it as an FAQ.

Q: PI's argued about whether the letter of intent needs to go through OSP at pre-proposal stage. Is there anything in writing about this?

A: Yes, on the website. Rule= if you are soliciting external funding it must come through OSP. Send the PI to their SPA if they argue about it. This is a common issue/misconception. Cathy puts a comment in external comments to let PI know that pre-proposal/LOI must come through OSP for review PRIOR to submission to sponsor. LOI=letter of intent. This is ADMINISTRATIVE POLICY at University of Idaho. If you are encountering problems at the LOI/pre-proposal stage call your SPA.

Q: Has an instance currently where program people talked to re-arrange the budget and Ann gets an email that says "we have an approved change in budget, how to we get this through OSP?". How should she handle this?

A: Come to OSP and ask us to initiate the process of FORMALLY requesting a rebudget to the AUTHORIZED OFFICIAL. Ask the question "is this a change in the scope?" A change in 25% or more of the budget is definitely a change in scope. Also ask: "who gave you permission?" If this was a discussion between PI and Program Manager, it probably does not constitute a formal rebudget request.

Q: When proposal is submitted and done and an award comes a year later EIPRS is not showing how cost share is committed; this presents a problem for PARS.

A: For the time being there is a "budget by category" document that can be used for this. Heather/Lindy are working on another solution for future in EIPRS to show detail view of cost share after proposal submission.

Q: Should PIs use Cayuse first or EIPRS?

A: EIPRS can talk to Banner but Cayuse cannot. If you are submitting using Cayuse, it should go Cayuse then EIPRS. **The best way to do it is to NOT use transfer feature. The easiest thing to do is to start Cayuse and EIPRS independently and make a copy of Cayuse file to upload to EIPRS. EIPRS routes the proposal through UI; Cayuse submits to agency.**

Q: How long does everything stay in EIPRS? She used to print all proposal docs but does not now.

A: EIPRS will stay FOREVER and there is a search feature to find the proposal. Long-term storage is in Stellent and all files are going DIGITAL. Proposal to award stage will all be in Stellent.

A(2): Rule of thumb at OSP is keep the FINAL VERSION only (the one that went to agency b/c that is what we committed to with agency). The comments come in here to show Auditors the changes without keeping all of the revised budgets, etc. The comments create a track just as well as 10 copies of a budget would. Cathy copies and pastes emails to EIPRS to make those emails part of the file of record.

Sunil Ramalingam (OSP Contract Review Officer) will be invited to next roundtable.