

DGA Round Table 8-10

Tuesday, August 10, 2010
8:58 AM

1. Training update:
 - a. **PI training** in final format; but still putting it together. Will be series of videos no more than 10 minutes long each. Goal: when to ask the question and who to ask. This is intended to be a starting point; not a detailed class on OMB Circulars, etc.
 - b. **Dean and Dept. chair**: should be ready by the end of the semester; very brief overview of what to watch for when approving proposal; may have live presentations but we want to be conscious of schedules. This will more than likely be in a web-based format.
 - c. **DGA training modules**: This is still a priority for OSP, but is still in development.

2. Cayuse:
 - a. Software update this weekend (Saturday, 21st) down from 8am to 10am; updates will be mostly functionality and behind the scenes compatibility fixes
 - b. NASA, National Endowment for the Arts and National Endowment for the Humanities will now be supported
 - c. Can now set F&A rate from main screen to default for entire proposal rather than setting the F&A rate for each line item.

3. Questions for FIG list, send to Kelly.
 - a. We plan to bring a list of questions to FIG rather than bring FIG members here to this meeting. If you have questions about hiring, compensation etc, email them to kmorgan@uidaho.edu so that we can present them to FIG

4. Lorraine McConnell: Director of Research Assurances (IRB, IBC and IACUC)
 - a. If you have Research assurances questions contact her.
 - b. Info: 208-885-6340; lmconnell@uidaho.edu.

5. From last meeting: Support for DGA where PI and DGA do not agree on what is/is not allowable: contact Kris Freitag:
 - a. 885-8994, kfreitag@uidaho.edu
 - b. She is a great resource for understanding allowability or even just where to find information

6. Use text to support use of e-codes etc (printing and binding, supplies)
 - a. Question from DGA: PI has workshop, can refreshments be charged to grant or do they have to put on Y account?
 - i. With all the possible scenarios, agency exclusions or other qualifiers that may be going on with the particular project, it's difficult to give a one-size-fits-all answer. The best course of action is to call Kris Freitag before the expense is put on the grant.
 - b. **Use expense justification tool to find out what to put into text to support purchase on grant.**

Search Go

Main Menu

Welcome, Kelly A. McDowell, to the University of Idaho VandalWeb System! Last web access on Aug 11, 2010 at 08:51 am

- Student Account Information**
- Student Information / Registration Menu**
Register, Apply for Degree, View your Transcript and Financial Aid, Obtain your Enrollment Verification
- Student Financial Aid & Scholarships**
- Student Housing Information**
University Housing Options
- Employee Information**
- Personal Information / Address Menu**
- Financial Information Menu**
Query Budget & Encumbrance data; Approve Financial Documents; View financial document details or their approval history.
- Finance Query for Non-Banner Users**
Budget Query, Encumbrance Query, View Document and Budget Availability
- Office of Sponsored Programs**
PAR Reports; Expense Justification
- Emergency Notification System**
Registration for Emergency Notification System
- Argos Reporting**
Argos Data Dictionary (datablocks, common names & reports)

c.

RELEASE: 8.3

pow

Search Go

d.

- OSP Personnel Activity Reporting (PAR)**
University of Idaho Employee Personnel Activity Reporting.
- NEW OSP Expense Justification**

RELEASE: 8.2.0.3

pow
SUI



Expense Justification for Grant Administrators

To filter list, enter all or part of expense code and/or description and press Submit Query (or use Ctrl F to search the list below).

Expense Code: Expense Description:

Select the expense code of interest to see the full description and justification.

e.

Expense Code	Description
E4105	Salaries
E4110	IH-Non Student
E4135	IH-Student
E4205	Life Insurance
E4210	Health Insurance
E4211	Flex Benefit Admin Fees
E4215	Workers Compensation
E4225	Retirement Contribution
E4230	Sick Leave Reserve
E4245	FICA Medicare
E4255	Unemployment Insurance
E4260	FICA

f. When providing text for expenses, think: "Could an independent, third party (auditor) view this

and know how it benefits the project and why it should be allocated to this project?"

- i. Ex: text could say "bought 10 pounds of flour at WinCo" Should say "purchased flour for use in experiments for research to test elasticity of components of commercial flour . . . "

7. If you have an FAQ you would like to see on the OSP website, email hnelson@uidaho.edu
8. Record retention at dept level: What is staying at the department? For how long?
 - a. Declined Proposals:
 - i. Make sure PI has copy before you discard
 - ii. OSP typically keeps a declined proposal for 1 year from the date of notification from agency. No regulations govern keeping rejected proposals
 - b. Closed out projects:
 - i. OSP retains their records for 3 years after the termination date of the grant unless specified otherwise. Other agency or policy guidelines could warrant keeping certain projects for longer, but 3 years is the minimum.
 - ii. Progress and tech reports, receipts should be kept at the department for 3 years following end-date of grant
 - 1) Agency guidelines may dictate keeping the records for longer than three years or may require that records are kept for a period of time after the final report rather than the termination date of the grant
 - 2) Financial records can go after 3 years. Ensure PI has copy if they want them
 - iii. What about reoccurring projects: Bean commission, etc?
 - 1) It depends. Bean Commission (and most of the other commissions) are stand alone projects each year; keep those records 3 years after each project ends
 - 2) If this project is a continuation (a five year project where we are awarded funds a year at a time), keep all the records for three years after the termination date of the final year of the award
 - 3) Remember that the budget number is just internal. In the case of the commissions, we are choosing to use budget numbers in a manner that makes it seem like continuing work but still stand-alone projects
 - iv. **Does the info have to be shredded? OSP to research and address at the next meeting.**
 - v. Export controls mandate keeping records for longer (5 years). **There will be better guidelines coming.**
 - c. What if you are unsure if you should destroy some records?
 - i. Email osp@uidaho.edu and Sarah/Whitney will research and get back with you. Give us a list of the budget numbers in question and we will look into whether they can be tossed
9. Meeting schedule and location:
 - a. 2nd Tuesday of every month, 9am to 10am; in Crest Room.
 - b. Same call-in number and participant code - 1-888-706-6468 code - 550-1280
 - c. **Will be posting minutes on site to eliminate missing a DGA that couldn't attend, etc.**
10. Open floor:
 - a. Possible to use webinar for DGA round table so call-in people can see what is happening?
 - i. We aren't able to do a video link at this time. Webinar software is free. Skype?
 - ii. DGA's off-campus having problems hearing; need to devise a way to mute background noise for off-campus participants
 - b. DGA 101
 - i. Coming up in the near future.
 - ii. Would focusing on post award be better than previous DGA training focused on pre-award?
 - 1) DGA's want to know what to look out for prior to making mistakes/problems. Ex) foreign travel.
 - c. **Kris will be at next meeting; possibly create a list identifying huge problems, reoccurring problems, etc.**

- i. The Cost Accounting unit performs an expenditure review based upon transaction risk associated with the expense code (low, medium, high) and will also look at trends across expenses on an annual basis..
- d. OSP would like to do some sort of outreach where we can communicate not just about problems but about the good stuff. Would like to be thought of as a team member, not as "oh no OSP is calling me". Questioning items is something OSP has to do in order to have good audits; not just to pester/create more work. We try to be cordial and concise; have to ask the question to track/justify expenses for auditing.