RE: DGA Roundtable Agenda

November 2, 2020 1:30- 2:30 pm via zoom

Call-in number: Zoom Join form PC, Mac Linux. iOS or Android <https://uidaho.zoom.us/j/803432660>.

**See calendar invite for additional details on zoom access.**

**Resources:**

DGA Mentor List: <https://www.uidaho.edu/research/faculty/dga#accordion-row-179357d9-8e0e-4cd4-94a5-1d3017d84286->

DGA Minutes and past handouts: <https://www.uidaho.edu/research/faculty/dga#accordion-row-4a8789b0-2d5b-426d-9175-eb516e227425->

DGA resource page on OSP site (helpful for PIs too): <https://www.uidaho.edu/research/faculty/dga>

***Zoom meeting protocol –***

*Please keep your microphones muted during the presentation and wait until the end for questions.*

*During the DGA Roundtable Discussion portion of the meeting, please wait for the person currently speaking to finish before asking any questions or you may also put your questions on chat and we will address your questions.*

*Thank you all for all that you do!*

1. Introduction/Fellowships Process for Tuition and Fees -Lauren Perkinson

Lauren to provide a handout to distribute to the DGA’s

1. Tips and Tricks for BANNER – Heather Nelson

To about looking at an org as a whole, revenue, expenditures – BDST

**Announcements –**

All prior approvals go through Office of Sponsored Programs, Post Award

Differences between Early setup & Advanced funding

**Early Setup:**

When a new agreement (project) has not yet been received, or an agreement has been received but not yet executed. Early setup procedure is to be initiated by the PI, college or unit (department) by submitted the required form. Which is found on OSP’s website.

**Advanced funding:**

The advance funding procedure is to be initiated by the PI, college, or unit (department) when a modification to an existing agreement (project) has not yet been received to extend and/or add additional funding to an established grant code (and index or indexes), or a modification has been received but not yet executed, to allow for expenditures in support of the next phase of the project. An authorized designee of the unit, per [APM 45.05](https://www.uidaho.edu/governance/policy/policies/apm/45), must provide authorization for advance funding, to OSP Post Award, to allow for work to proceed for the next phase of the project in advance of the end-date or deficit spending. This process reduces the number of cost transfers, prevents disruptions in on-going project work, and helps to ensure that expenses are attributed to the project that they support. Advance funding differs from an early (preliminary) setup. Advance funding is for existing agreements as opposed to a new agreement. If a new agreement requires a project budget before the new agreement is received and executed, please see the [early (preliminary) setup procedure](https://www.uidaho.edu/-/media/UIdaho-Responsive/Files/research/Faculty/resources/forms/setup-request-forms/early-budget-setup-request-form-pdf.pdf?la=en&hash=8031A56C2BE648AD4147B1138631C70635CBF981) for the relevant process and policy information.

**Process**: The unit Dean or institute equivalent, or designee, should submit an Advance Funding authorization email, utilizing the template below, via email to the Post Award unit of OSP.

*Links to OSP’s website for information regarding Advanced funding & Early setup*

https://www.uidaho.edu/research/faculty/dga

https://www.uidaho.edu/research/faculty/resources/forms