**GRANT COORDINATOR MEETING 9/12/13**

**SPONSORED PROGRAMS ACCOUNTING (SPA)**

**RECEIVING DOCUMENTATION ON SPONSORED PROGRAMS**

It is the responsibility of the department to ensure the goods they ordered have been received or the services have been performed before payments are approved.  When charging goods or services to sponsored program accounts, the “received date” of the item must be within the period of performance of the grant or contract.

The receipt of goods and services can be documented by making a note on a packing slip, itemized receipt/order confirmation, or vendor/supplier invoice.  If departments do not want to keep paper copies of the receiving documentation, files can be attached to the VO at any time or attached to the CyBuy & Pcard systems. The documentation to support expenses should contain adequate information to identify what was purchased, where it was purchased, who purchased it, when it was purchased, and why it was purchased.

**BRIDGE FUNDING: ARRIVAL OF A NEW CHILD POLICY**

A new policy was implemented in July 2013 which provides short term funding for up to six weeks for all graduate assistants and post docs who will be the primary care-giver after the birth or adoption of a child. The bridge funding temporarily replaces the normal mission-oriented funding.

The bridge funding will be provided by an equal match from the Graduate College and the academic home college of the graduate assistant, or by an equal match from the Graduate College and home academic college/equivalent employing unit of the post doc. HR does not consider this funding a fringe benefit and therefore the academic home/employing unit portion should not be charged to a sponsored program.

For more information on the policy, please see: <http://www.gradcollege.iastate.edu/common/forms/student_forms.php>.

**ACCESS TO KFS & EDATA**

If someone needs access to KFS or eData, the request should be made by the person’s supervisor using the new on-line Administrative Systems Request form which can be found at <http://www.it.iastate.edu/howtos/adin> .

**UPDATING THE FISCAL OFFICER ON ACCOUNTS**

Departments may have more than one person who administers accounts within the department. If you would like to change the person listed as the fiscal officer, you can do so by editing the account edoc. This can be done by:

* Going into KFS and searching for the account number to edit (note the edoc will show the original account data on the left-hand side with fields to edit on the right-hand side)
* Click *Edit* next to the desired account number
* In the *Description* field, please enter the account number and “Fiscal Officer Update” (i.e.: 400-63-21 Fiscal Officer Update)
* Go to the *Account Responsibility* panel and enter the person’s net ID or click on the magnifying glass icon to look up the person’s net ID
* Go to the bottom of the form and click *Submit*
* The form will then route for approvals and will then be reviewed/approved by SPA

**ERROR CERTIFICATION ON THE GEC FOR SPONSORED PROGRAMS**

When using the GEC to move expenses onto a sponsored programs account, additional information will need to be entered in the Error Certification panel. Listed below are the required fields with a description of the information to be included.

* **Describe in detail the expenditures that are being transferred** – provide a brief description of the expenditures that are being transferred
* **How did this expenditure benefit the project**? –provide a brief description of how the expenditures benefited the project
* **How the error occurred**? – provide a brief description of the circumstances that led to the expense being charged to the wrong account
* **Why is the error correction late**?
  + If the transaction date is within the past 90 days, enter N/A
  + If the TO account is non-federal, enter N/A
  + If the TO account is federal, the transaction is unallowable and should not be processed
    - If there are extenuating circumstances which may warrant further consideration, please contact the SPA accountant prior to proceeding

**ACCOUNT VS. AWARD STATUS**

The Award Status is now shown on the SPA Financial Report. The table below is provided to help you understand how the Award Status relates to Account Status, and how those statuses relate to the prior legacy system statuses.

|  |  |  |  |
| --- | --- | --- | --- |
| Legacy Equivalency | Active | Temporary Closed | Historied |
| Award Status (KC) | Active | Final | Closed |
| Account Status (KFS) | Active | Active | Closed |

Please note that KFS does not have an equivalent to the Temporary Closed status formerly used in the legacy financial system. Therefore, SPA is unable to close an account to keep a PI from overspending or spending past the award end date.

**EDATA & KFS FAQ**

Here are some quick tips and answers to frequently asked questions received by SPA.

**EASE FORMS**

The 2013-06 EASE forms will be printed and distributed to EASE coordinators by September 16th. The Controller’s Department has requested that ALL of these forms be returned by Friday, October 4th, to Nichole Seedorf in SPA. We appreciate your efforts and assistance in getting these EASE forms returned to the Controller’s Department in a timely manner.

**FUTURE TRAINING & PROFESSIONAL DEVELOPMENT OPPORTUNITIES**

OSPA & SPA will once again offer the Sponsored Programs Education and Certification Sessions (SPECS) starting in Fall 2014! Troy Nichols will send out a notice to the grant coordinator email list once the registration has opened.

SPA plans to offer two eData training classes (basic & advanced) focused specifically on reports related to sponsored programs financial information in Spring 2014. The dates & times are still to be determined.

NCURA webinar – Embezzlement, False Claims, Theft & Bribery: NSF-OIG Investigated Cases Your Institution Needs to Know About

Oct. 4th from 10-11:30 a.m. in 1204 Kildee

This Webinar will look at several cases involving Universities and discuss how they occurred, how they were discovered and the difference between criminal vs. civil and personal fraud vs. institutional fraud. Senior Special Agent Paul Coleman will discuss several Fraud cases investigated by NSF-OIG that involved Financial Conflicts of Interest by Principal Investigators, and other grant personnel.

NCURA Conferences ([www.ncura.edu](file:///C:\Users\nseedorf\AppData\Local\Microsoft\Windows\Temporary%20Internet%20Files\Content.Outlook\KXMS7P9U\www.ncura.edu))

* Fundamentals of Sponsored Project Administration, December 9-11, 2013, Charleston, SC
* Sponsored Project Administration II, December 9-11, 2013 Charleston, SC
* Financial Research Administration Conference, March 15-17, 2014, San Francisco, CA
* Pre-award Research Administration Conference, March 18-20, 2014, San Francisco, CA
* NCURA Region IV Spring Meeting, April 27-30, 2014, Indianapolis, IN

SRA Conference ([www.srainternational.org](http://www.srainternational.org))

* SRA International 2014 Annual Meeting, October 26-30, 2013, New Orleans, LA
* Midwest/Northeast Section Meeting, April 27-30, 2014, Minneapolis, MN