CAMPUS INFORMATION SESSION: AWARD SETUP

Grant & Contract Accounting

July 17, 2024

INTRODUCTIONS

> **Lily Gebrenegus**
> **Session Presenter**
> **24 years with GCA**

> **Meg Russo**
> **Session Moderator**
> **17 years with GCA**

AGENDA

> **Award Setup Overview**

> **Common Reasons for Returns and Denials**

> **Reasons to Cancel an Award/Award Line**

> **Workday Reports and Resources**

> **Q&A**

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HOUSEKEEPING

> **Sessions are recorded and will be uploaded to the Campus Information Sessions webpage**

> **Please enter questions in the Zoom Q&A**
> - o **Some will be addressed live**
> - o **Some will be reserved for the Q&A section at the end**

> **We may ask you to unmute if clarification is needed**

> **Two polls!**

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AWARD SETUP OVERVIEW

"Award Setup" includes Advance Requests, Award Setup Requests, and Modification Requests

> **Advance Requests are for new awards and competing renewal awards before UW accepts award or award setup is delayed**

> **ASRs are for new awards and competing renewal awards once award is fully executed at UW**

> **MODs are for changes to an existing award**

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AWARD SETUP OVERVIEW

GCA's goal is to:

> **review and process each item or**

> **put the item on <u>Hold</u> if it can't be processed right away (e.g. Workday problem) or**

> **return the item to Campus or OSP for correction, clarification, confirmation or**

> **deny the request**

...within 5 business days accurately

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COMMON RETURN REASONS: ASRs

> **Dates on SAGE Budget don't match award**
  - o **Budget Period vs. Project Period**
  - o **Process change in SNAP, NSF, NASA, et al.**

> **SPA Type on ASR doesn't match SAGE Budget worksheet**

> **SAGE Budget total doesn't match award**
  - o **SAGE Budget must match award to the penny**
  - o **F&A amount must be calculated correctly**

> **Using old Cost Share Addendum instead of current version**

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COMMON RETURN REASONS: MODs

> **Missing SAGE Budget**
> o **Required if you select "Funding & budgeting changes" (except for cost share changes)**

> **SAGE Budget total does not match award**
> o **SAGE Budget must match award to the penny**
> o **F&A amount must be calculated correctly**

> **SAGE Budget doesn't tell the full story for rebudgeting requests**
> o **"Rebudgeting" includes: Rebudgeting within one award line; Restriction releases; Carryover; Transfers between award lines**

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PRE-SESSION QUESTION: DC/IDC

Q: Regarding NIH awards: does the SAGE budget need to match the direct and indirect amounts on the NOA exactly?

A: No, the SAGE Budget direct and indirect amounts don't need to match the NOA exactly. UW is allowed to rebudget, but GCA needs the indirect amount to be calculated correctly using the F&A Rate on the NOA.

PRE-SESSION QUESTION: ROUNDING

Q: Correcting dollars on SAGE budget to match the NoA when there is a rounding issue with the IDC: Instructions from the Shared Environment (UW Connect) stated to add $1 with description correcting dollar under 38-00 and custom rates to exclude from IDC. Lately, I got 2 feedback from GCA to not use custom IDC no further instructions. I used the $1 correcting under 03-04 which doesn't charge IDC. Should this become our new job aid on how to deal with it, using 03-04?

A: You should continue to select 38-00 and the Custom F&A Base as described in this SAGE job aid: Guidelines for a Budget Difference Between the SAGE Award Budget and the Sponsor Award

COMMON REASONS FOR DENIALS

> **Incorrect routing was selected on a MOD**
  - o **GCA Only vs. OSP/GCA**
  - o **OSP/GCA if sponsor approval is required, an authorized official signature, or OSP review is needed**

> **Wrong item type is submitted**
  - o **ASR vs. MOD**
  - o **Temporary Internal Extension vs. Advance Extension**

> **Duplicate request**

> **Request is no longer needed**
  - o **Submitted an Advance Request but the ASR is processed first**

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REASONS TO CANCEL AWARDS OR AWARD LINES

> **GCA cancels an <u>award</u> when:**
  - o **The wrong Sponsor was entered into Workday or**
  - o **Duplicate award**

> **GCA cancels an <u>award line</u> when:**
  - o **Change Line Type from Cost Reimbursable to Fixed Amount**
  - o **Company Change**
    - ▪ **Usually related to Cost Center change/correction**

WORKDAY REPORTS

> **Find Awards – Custom R1230**
>> o **Search by Grant PI, Cost Center, Cost Center hierarchy**

> **Find Award Tasks**
>> o **Check for tasks assigned to "Grant Manager"**

> **Find Suppliers and Find Subrecipients**
>> o **When requesting a subaward award line**

Poll: Would it be helpful to add these reports to the GCA Recommended Reports webpage?

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RESOURCES

> **GCA Award Setup**
  o **Recent changes to GCA Only MOD webpage**

o **Tips for Success-Award Setup and Modification Requests**

o **OSP Setup Financials**

o **OSP Award Changes**

o **SAGE Budget Resources**
  o How to Make a SAGE Budget Snapshot

o **ASR demos with Campus, OSP, and GCA (6/7, 6/14, 6/21)**

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FREQUENTLY ASKED QUESTIONS

> **How do I know if I should create an Award Setup Request or a Modification Request?**

> **How do I know which Modification Request type to choose?**

> **Is GCA notified when I add a comment to an ASR or MOD?**

Q&A

PRE-SESSION QUESTION: CHANGE GRANT NAME

Q: I have been trying to change the name of a grant in SAGE in the General Information section. Now,WD shows the grant title as "Primary Worksheet". I have tried to change this in a MOD Request in the award portal and keep running into a brick wall. Can you tell me how I would make the name change for GR#####?

A: Create a GCA Only MOD, mark "Other Changes, add the grant worktag ID and the title you want to the Comments and submit! Check out the Other Changes section of GCA's MOD webpage.

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LIVE QUESTIONS

Time to answer questions from the audience

WRAP UP

Session recording, slides, links will be posted within 2 business days on the Campus Information Sessions webpage

Please fill out our survey-link will be in Chat

> **Deadline: EOD Wednesday, July 24, 2024**

Next session is Wednesday, July 31 on Financial Reporting

> **Submit questions ahead of time using this form**

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