

# The Latest Buzz with G&C Accounting

Tuesday, June 23, 2026  
1:00 – 2:30 PM



# Agenda

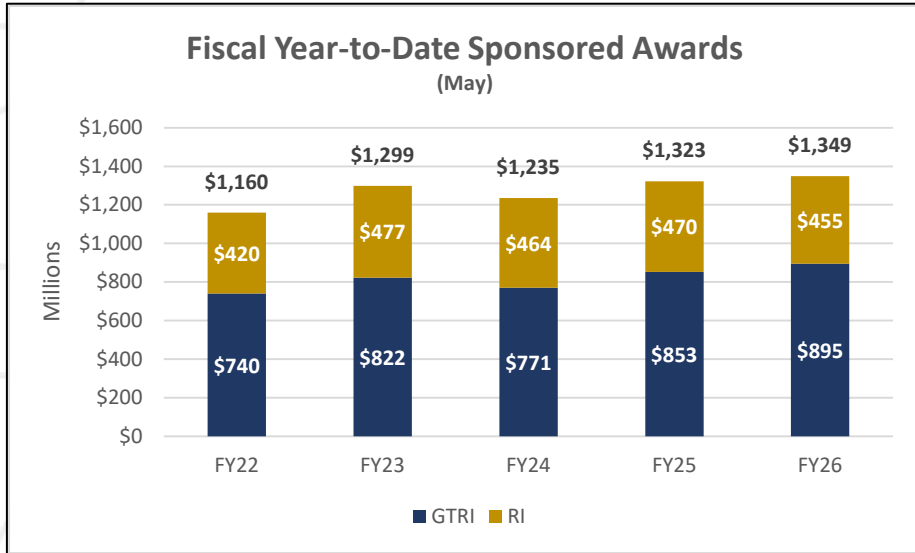
Topic	Presenter(s)
Research Updates	Josh Rosenberg
The Notorious ABG (All 'Bout Grants)	Chris Cho
Sponsored Research Accounting Updates	Glenn Campopiano
Award/Grant Exception Demo	Douglas Feller
Cost Accounting Updates	Jonathon Jeffries
Service Centers Part 3: Common Pitfalls to Avoid (and How to Fix Them)	Andrew Chung
How to Request a Mass Grant Manager Change via ServiceNow	Tony Wang
Training Updates	Lee Broxton
Closing	Josh Rosenberg

# Research Updates

**Josh Rosenberg**

Executive Director, Grants and Contracts

# Georgia Tech Research (RI and GTRI)

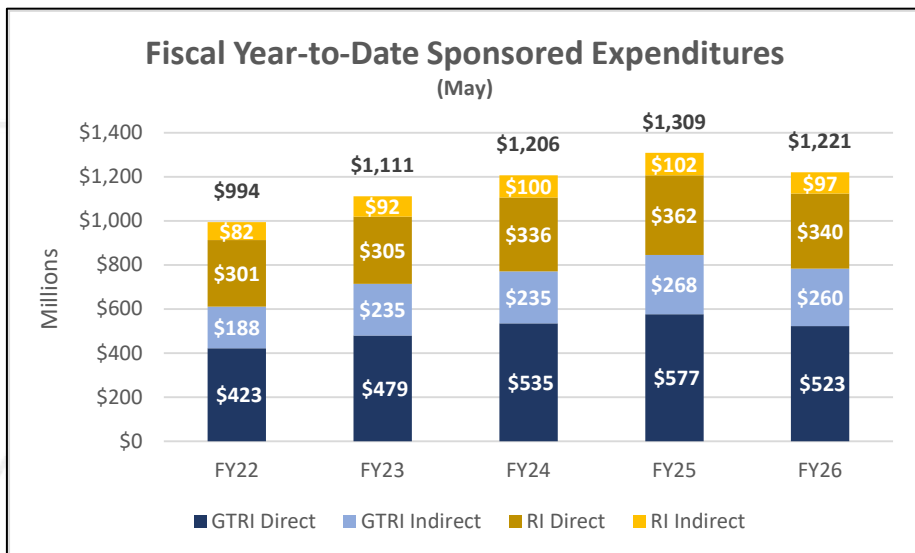


**Trends:**

**Actuals (AWARDS):**

- **FY26: \$1,349,238,159**
- GTRI: up 4.9%, and \$41.9 million (\$894.6 million in FY26 vs. \$852.7 million in FY25)
- RI: down 3.3% and \$15.4 million (\$454.7 million in FY26 vs. \$470.1 million in FY25)
- **GT Overall: up 2.0% and \$26.5 million (\$1.349 billion in FY26 vs. \$1.323 billion in FY25)**

*Note: For GTRI, we are projecting a 4% increase in awards. For RI, we are projecting a 3% decrease in awards.*



**Trends:**

**Actuals (EXPENDITURES):**

- **FY26: \$1,220,777,018**
- GTRI: down 7.4% and \$62.5 million (\$782.8 million in FY26 vs. \$845.3 million in FY25)
- RI: down 5.5% and \$25.4 million (\$437.9 million in FY26 vs. \$463.3 million in FY25)
- **GT Overall: down 6.7% and \$87.9 million (\$1.221 billion in FY26 vs. \$1.309 billion in FY25)**

*Note: For GTRI, we are projecting a 7% decrease in expenditures. For RI, we are projecting a 5% decrease in expenditures.*

# RI Sponsored Programs – Awards

YTD through Period 11: May

RI NEW AWARDS (Through May)						
Federal Agency or Sponsor Type	FY26	% of RI Portfolio	FY25	26 v. 25 \$ Variance	26 v. 25 % Variance	5 Year Avg
NATIONAL SCIENCE FOUNDATION (NSF)	101,722,914	22%	79,681,080	22,041,834	28%	89,094,174
DHHS	78,805,851	17%	57,164,503	21,641,347	38%	58,944,453
INDUSTRIAL SPONSORS	58,892,118	13%	68,178,000	(9,285,883)	-14%	62,472,573
INDUS RES INST/FDNS/SOC	51,847,470	11%	39,595,195	12,252,275	31%	44,828,717
COLL/UNIV/RES INSTITUTES	46,276,762	10%	60,766,652	(14,489,890)	-24%	51,343,819
US DEPT OF ENERGY	29,947,402	7%	52,196,000	(22,248,598)	-43%	33,343,844
NASA	17,817,515	4%	19,224,922	(1,407,407)	-7%	17,677,566
STATE & LOCAL GOVERNMENT	15,393,612	3%	8,245,293	7,148,319	87%	9,713,652
NAVY	13,351,930	3%	13,589,998	(238,068)	-2%	15,754,488
US DEPT OF DEFENSE	10,647,454	2%	18,916,748	(8,269,294)	-44%	12,708,012
GOVT-OWNED/CONTRACTOR OP	7,672,392	2%	9,560,644	(1,888,252)	-20%	9,109,714
AIR FORCE	5,722,711	1%	4,243,279	1,479,432	35%	8,077,732
ARMY	4,358,254	1%	10,937,998	(6,579,744)	-60%	9,711,540
US DEPT OF COMMERCE	3,499,406	1%	13,262,486	(9,763,080)	-74%	14,957,209
US DEPT OF LABOR	2,698,874	1%	1,567,719	1,131,155	72%	1,620,744
<b>Grand Total</b>	<b>454,681,373</b>	<b>100%</b>	<b>470,060,981</b>	<b>(15,379,608)</b>	<b>-3.3%</b>	<b>457,228,369</b>

AWARDS: Cumulative Report thru: MAY					
College/Unit	FY26		FY25		Award Dollar Variance
	Awarded Amount	Awards	Awarded Amount	Awards	
COMP	\$ 39,780,941	155	\$ 37,450,410	150	6.2%
COS	\$ 60,420,672	320	\$ 60,612,622	317	-0.3%
DSGN	\$ 8,253,940	54	\$ 7,755,894	125	6.4%
ENGR	\$ 247,856,863	1,104	\$ 286,589,976	1,294	-13.5%
GTRI	\$ 894,556,786	846	\$ 852,669,296	934	4.9%
IAC	\$ 2,193,934	33	\$ 5,844,902	54	-62.5%
OTHERS	\$ 95,023,509	317	\$ 71,148,624	319	33.6%
SCB	\$ 1,151,514	2	\$ 658,554	10	74.9%
<b>Total</b>	<b>\$ 1,349,238,159</b>	<b>2,831</b>	<b>\$ 1,322,730,278</b>	<b>3,203</b>	<b>2.0%</b>
<b>Resident Instruction and Other</b>	<b>\$ 454,681,373</b>	<b>1,985</b>	<b>\$ 470,060,981</b>	<b>2,269</b>	<b>-3.3%</b>

Awards		
	YTD (May)	Full Year
FY26	\$ 454,681,373	\$ 491,967,278
FY25	\$ 470,060,981	\$ 507,182,761
FY24	\$ 464,425,346	\$ 496,349,867
FY23	\$ 476,827,426	\$ 512,798,650
FY22	\$ 420,090,141	\$ 443,169,708

# RI Sponsored Programs – Expenditures

YTD through Period 11: May

Expenditure Analysis: May	FY26 YTD	FY25 YTD	Change
Salaries and Wages	\$ 128,177,545	\$ 133,736,871	-4.2%
Subcontracts	\$ 68,025,454	\$ 73,687,571	-7.7%
Other Direct Costs	\$ 42,826,949	\$ 45,191,139	-5.2%
Tuition Remission	\$ 27,322,908	\$ 29,744,039	-8.1%
Fringe Benefits	\$ 26,203,014	\$ 26,883,622	-2.5%
M&S	\$ 24,504,507	\$ 26,673,711	-8.1%
Equipment	\$ 16,240,758	\$ 18,084,793	-10.2%
Domestic Travel	\$ 4,770,506	\$ 5,294,545	-9.9%
Foreign Travel	\$ 2,014,146	\$ 1,760,776	14.4%
High Performance Computing	\$ 262,519	\$ 177,475	47.9%
Unallocated/Blank Object Class	\$ 95,827	\$ 370,270	-74.1%
<b>DIRECT</b>	<b>\$ 340,444,132</b>	<b>\$ 361,604,812</b>	<b>-5.9%</b>
<b>INDIRECT (IDC)</b>	<b>\$ 97,487,190</b>	<b>\$ 101,698,984</b>	<b>-4.1%</b>
<b>Total</b>	<b>\$ 437,931,322</b>	<b>\$ 463,303,796</b>	<b>-5.5%</b>

EXPENDITURES: Cumulative Report thru: MAY			
College/Unit	Expenditures - FY26	Expenditures - FY25	Variance
COMP	\$ 36,321,094	\$ 34,950,255	3.9%
COS	\$ 58,398,680	\$ 57,101,845	2.3%
DSGN	\$ 7,461,045	\$ 8,542,139	-12.7%
ENGR	\$ 243,552,438	\$ 263,796,118	-7.7%
GTRI	\$ 782,845,696	\$ 845,353,453	-7.4%
IAC	\$ 5,549,360	\$ 6,507,952	-14.7%
OTHERS	\$ 86,114,844	\$ 91,452,661	-5.8%
SCB	\$ 533,861	\$ 952,826	-44.0%
<b>Total</b>	<b>\$ 1,220,777,018</b>	<b>\$ 1,308,657,250</b>	<b>-6.7%</b>
<b>Resident Instruction and Other</b>	<b>\$ 437,931,322</b>	<b>\$ 463,303,796</b>	<b>-5.5%</b>

Expenditures - Direct		
	YTD (May)	Full Year
FY26	\$ 340,444,132	\$ 375,194,301
FY25	\$ 361,604,812	\$ 394,941,370
FY24	\$ 335,930,298	\$ 371,624,622
FY23	\$ 304,880,469	\$ 337,688,551
FY22	\$ 301,418,861	\$ 330,920,330
Expenditures - Indirect		
	YTD (May)	Full Year
FY26	\$ 97,487,190	\$ 108,605,346
FY25	\$ 101,698,984	\$ 114,321,417
FY24	\$ 99,620,831	\$ 111,102,607
FY23	\$ 92,384,908	\$ 103,856,777
FY22	\$ 81,819,330	\$ 93,079,082

# Grants & Contracts Metrics

YTD through Period 11: May

INVOICING			
Invoicing YTD FY2025 vs. FY2026 (thru May)			
Invoice Types	FY26	Monthly FY26	FY25
G&C GIT Standard Certification Required	3,052,260	\$ 277,478	\$ 1,546,947
G&C GTRC Custom Certification Required	2,058,330	\$ 187,121	\$ 1,132,159
G&C GTRC Standard Certification Required	134,161,826	\$ 12,196,530	\$ 139,871,810
G&C In House	54,409,177	\$ 4,946,289	\$ 30,700,345
G&C LOC Draw	179,256,639	\$ 16,296,058	\$ 184,246,946
G&C SF1034	11,995,683	\$ 1,090,517	\$ 17,913,010
G&C SF270	46,682,633	\$ 4,243,876	\$ 56,029,139
Bursar Billed	23,299,185	\$ 2,118,108	\$ 23,775,522
<b>Grand Total</b>	<b>\$ 454,915,733</b>	<b>\$ 41,355,976</b>	<b>\$ 455,215,878</b>
<b>Raw Invoice Counts</b>	<b>13,859</b>	<b>1,260</b>	<b>15,131</b>
<b>Year over Year Invoicing Change</b>	<b>Dollars</b>	<b>Invoice Counts</b>	
YTD change in FY26 over FY25	\$ (300,145)	(1,272)	
YTD percentage change	-0.1%	-8.4%	

FINANCIAL REPORTS		
Financial Reports YTD FY2025 vs. FY2026 (thru May)		
Report Types	FY26	FY25
Annual Financial Report	81	75
Final Financial Report	191	184
Monthly Financial Report	19	85
Quarterly Financial Report	363	401
Milestone (Event Based)/Revised	-	4
Semi-Annual Financial Report	157	178
<b>TOTALS</b>	<b>811</b>	<b>927</b>
<b>Year over Year Reporting Change</b>	<b>Report Counts</b>	
YTD change in FY26 over FY25	(116)	
YTD percentage change	-12.5%	

Through May					
G&C ANALYST TEAM: JOURNALS					
Journals (Total)	FY26	% of Total	FY25	% of Total	% Chg FY
Appropriate Grants Management	1180	87%	1054	81%	
"Red Flag" Grants Management	182	13%	245	19%	

*Appropriate Grants Management: F&A adjustments, accounting adjustments, in-kind cost sharing, month-end entries, audit, blank object class, tuition correction, equipment entries.*

*"Red Flag" Grants Management: Primarily prior year Salary and Planning Distribution (SPD) transfers, past term/overages.*

## Other Stats:

- Independent of journal activity through May, the analyst team managed: 893 award initiations, 2,183 award modifications, 6,248 award corrections, 2,715 closeouts, and 212 service now tickets.

# RI Sponsored Programs – Award Exceptions by Department

## As of June 1, 2026

Award Exceptions (Overspent) as of June 1, 2026				Award ID Counts	
Departments	Past Term	In Performance	Available Balance	1-Jun	1-May
Center for Research into Novel Comping Hierarchies	(286,969)		(286,969)	1	0
Georgia Electronics Design Center	(164,466)		(164,466)	1	0
Electrical and Computer Engineering	(155,434)	(571,532)	(726,966)	39	4
GT/Emory Biomedical Engineering	(141,395)	(310,384)	(451,779)	14	0
Earth And Atmospheric Sciences	(119,102)	(29,148)	(148,250)	5	0
School of Public Policy	(106,432)		(106,432)	1	2
Chemistry and Biochemistry	(70,430)	(230,602)	(301,032)	9	11
Institute for Bioengineering & Bioscience	(57,073)	(12,825)	(69,898)	2	0
Mechanical Engineering	(44,996)	(577,971)	(622,967)	23	20
Physics	(43,437)	(2,245)	(45,682)	4	3
Materials Science and Engineering	(39,142)	(480,558)	(519,700)	10	0
EI2 Program Operations	(30,142)	(17,105)	(47,247)	3	1
Aerospace Engineering	(23,258)	(444,514)	(467,773)	8	11
Center for Education Integrating Science, Mathematics & Computing (CEISMC)	(17,932)		(17,932)	1	0
Biological Sciences	(8,762)	(29,599)	(38,360)	6	0
<b>Grand Total</b>	<b>(1,327,953)</b>	<b>(30,508,238)</b>	<b>(31,836,191)</b>	<b>183</b>	<b>182</b>

### The Exception Report Suite:

- Award Exception Report
- Grant Exception Report
- Cost Share Exception Report
- Awards and Grants Missing PIs
- Open Obligations on Grant Lines in Close Out Status
- Charges Past the Award End Date
- No Activity Awards – 90 Days Post Activation

# Grants & Contracts – Education and Outreach

<https://www.grants.gatech.edu/pi-articles>

<https://www.grants.gatech.edu/latest-buzz-gc-accounting>

## Featured PI Article



### PI ARTICLE: Roles on Sponsored Research Proposals and Awards

It is important to understand the different roles of individuals who contribute towards sponsored research. These are not only the key personnel who provide measurable effort and can be charged directly to grants, but also individuals that provide administrative support during the pre and post award process.

More PI articles are found in the [archive](#).

[Read the Article](#)

[MAY 2026  
ARTICLE](#)

## Upcoming Events

### The Latest Buzz with G&C Accounting

G&C hosts a monthly information session to provide post award research news and updates to the Georgia Tech research community.



**Next session (Virtual):**

on Tuesday, June 23 , 1:00 to 2:30 PM

[Register](#)

[View Past Session Recordings](#)

### G&C Office Hours

The Project Accounting Management Team hosts monthly, virtual “Office Hours” for campus. Anyone is welcome to join and ask questions on the last Monday of each month, between 10:00am and 11:00am.



**Next office hours:**

June 29, 2026 (Monday)

10 - 11 a.m.

[Learn More](#)

# The Notorious ABG (All 'Bout Grants)

**Chris Cho**

Technology Strategist - OIT

# The Notorious ABG (All 'Bout Grants)

<b>What?</b>	Workday Worksheets Template for Grant Reporting
<b>When?</b>	July 2026
<b>Why?</b>	<p>Streamlined process to capture and forecast available balance for award portfolios</p> <ul style="list-style-type: none"><li>• Dynamic aggregation by Grant, Object Class, PI</li><li>• Budget and expense projections</li><li>• Year over year comparisons</li><li>• Burn reporting</li></ul>

# SABER – ABG Version

## The Notorious ABG (All 'Bout Grants) - Template V1.0 (DEMO)

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summaryGroup... fx Grant

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Group By:	Award PI														
2	Then Group By:	Award														
3	Then Group By:	Grant	Grant													
4	Then Group By:															
5																
6																
7	Award PI	Award	Sponsor	Award End Date	Grant	Original Budget	Amendments	Current Budget	Actuals	Obligations	Commitments	Available Balance	Percent Remaining	Projected Budget	Projected Expenses	Projected Balance
8			NATI	Object Class	/30/2026	8,076,251.00	(819,465.00)	7,256,786.00	7,160,169.21	51,175.62	2,615.05	42,826.12	0.01	0.00	0.00	42,826.12
9			NATI		/30/2026	0.00	357,421.00	357,421.00	343,346.18	14,074.82	0.00	0.00	0.00	0.00	0.00	0.00
10			NATI	Grant PI	/30/2026	0.00	384,872.00	384,872.00	384,871.99	0.00	0.00	0.01	0.00	0.00	0.00	0.01
11			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	383,611.00	383,611.00	383,611.01	0.00	0.00	(0.01)	0.00	0.00	0.00	(0.01)
12			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	372,831.00	372,831.00	330,028.82	42,802.18	0.00	0.00	0.00	0.00	0.00	0.00
13			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	142,560.00	142,560.00	140,676.07	1,883.93	0.00	0.00	0.00	0.00	0.00	0.00
14			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	286,972.00	286,972.00	280,193.18	6,778.82	0.00	0.00	0.00	0.00	0.00	0.00
15			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	344,092.00	344,092.00	344,091.72	0.28	0.00	0.00	0.00	0.00	0.00	0.00
16			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	367,051.00	367,051.00	367,050.00	0.00	0.00	1.00	0.00	0.00	0.00	1.00
17			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	341,050.00	341,050.00	341,047.96	2.04	0.00	0.00	0.00	0.00	0.00	0.00
18			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	332,066.00	332,066.00	330,481.07	1,583.92	0.00	1.01	0.00	0.00	0.00	1.01
19			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	866,393.00	866,393.00	863,598.40	2,794.60	0.00	0.00	0.00	0.00	0.00	0.00
20			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	402,339.00	402,339.00	402,266.37	73.64	0.00	(1.01)	0.00	0.00	0.00	(1.01)
21			NATIONAL SCIENCE FOUNI		09/30/2026	0.00	298,188.00	298,188.00	282,713.92	15,474.09	0.00	(0.01)	0.00	0.00	0.00	(0.01)
22			CARBON CAPTURE INC/AT		09/01/2026	539,688.00	476,842.00	1,016,530.00	1,002,218.28	2,835.41	0.00	11,476.31	0.01	0.00	0.00	11,476.31
23			US DEPT OF ENERGY/DOE		08/31/2025	1,326,312.00	(575,807.65)	750,504.35	750,504.36	0.00	0.00	(0.01)	0.00	0.00	0.00	(0.01)
24			US DEPT OF ENERGY/DOE		08/31/2025	332,105.00	0.00	332,105.00	332,105.15	0.00	0.00	(0.15)	0.00	0.00	0.00	(0.15)
25			US DEPT OF ENERGY/DOE		08/31/2025	0.00	361,139.00	361,139.00	189,544.24	171,594.76	0.00	0.00	0.00	0.00	0.00	0.00
26			US DEPT OF ENERGY/DOE		08/31/2025	0.00	214,668.65	214,668.65	214,668.54	0.00	0.00	0.11	0.00	0.00	0.00	0.11
27			ECOVYST/MALVERN, PA		01/15/2027	310,000.00	0.00	310,000.00	161,208.39	22,261.12	0.00	126,530.49	0.41	0.00	0.00	126,530.49

# Projections

The Notorious ABG (All 'Bout Grants) - Template V1.0 (DEMO)

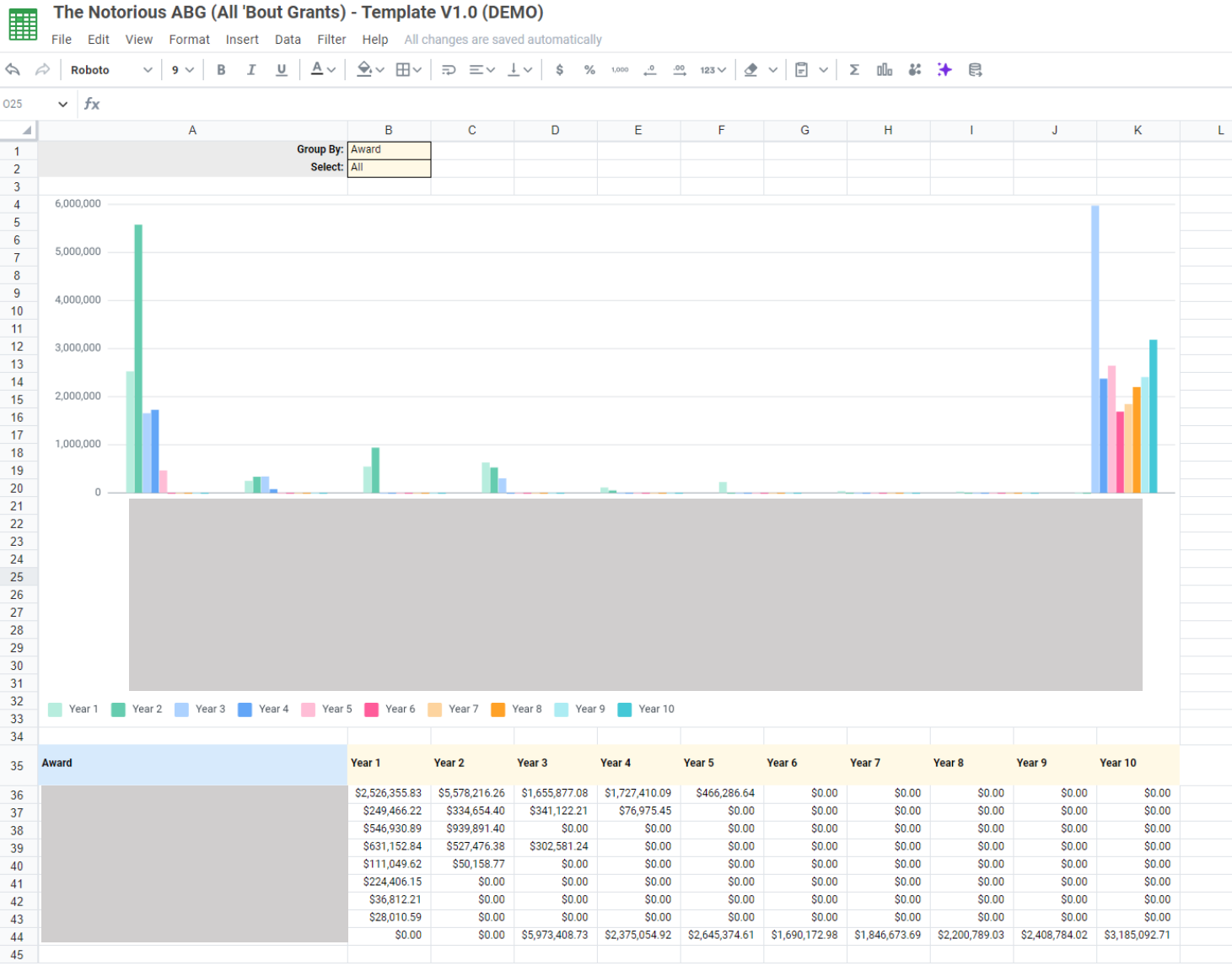
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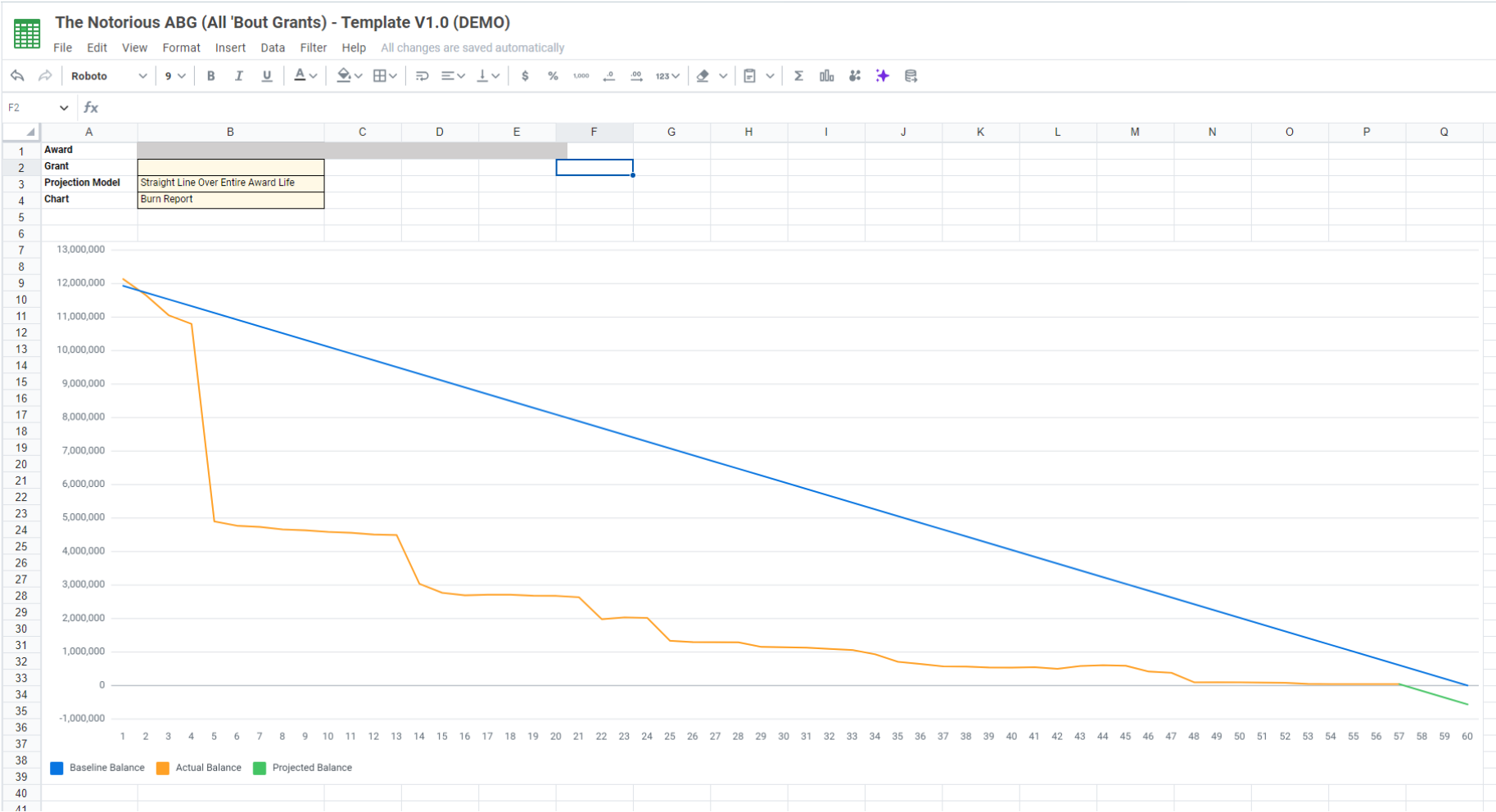
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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Grant	Object Class	Entry Type	Fixed Amount - NPS Only	Title	Pay Group	Benefits	FTE	Monthly Rate	Hourly Wage	Start Date	End Date	Projection Status	Memo	
1		Georgia Tech: 4000 Materials and Supplies	Expense	4000							3/1/26	3/1/26	Project		
2		Georgia Tech: 4000 Materials and Supplies	Expense			03A Salaried	Full		1.00	\$5,000.00	7/1/26	9/30/26	Project		
3															
4															
5															
6															
7															
8															
9															
10															
11															

# Year Over Year



# Burn Report



# Upcoming Lunch and Learns

- August 5, 12-1 PM (Workday Wednesday)
- August 12, 12-1 PM
- August 19, 12-1 PM
- August 26, 12-1 PM

Join the **Workday Financials User Group** Teams channel  
[General | Workday Financials User Group](#)

# Sponsored Research Accounting Updates

**Glenn Campopiano**

Director, Sponsored Research Accounting

# Sponsored Research Accounting Updates

## Managing Sub-awards in Workday –Creating and Maintaining Grant Lines.

When a new award is created and CIS/Budget indicates a subaward our analyst team will create a grant line for each sub-award.

Each grant line will contain the budget amount for the sub-award and the correct IDC for the expense. Currently IDC is capped on the first \$25,000 of the sub-award expense. ( that will be revised around FY28 to \$50k.

For example, the grant line budget for a \$100k sub-award on a Federal award would be  $\$100k + (57.4\% \times \$25k = \$14,350 \text{ IDC})$  so total for that grant line is \$114,350.

# Sponsored Research Accounting Updates

## Managing Sub-awards in Workday –Creating and Maintaining Grant Lines.

If unit is creating a new sub-award grant line on an existing award it is incumbent on the unit to request the new grant and provide the correct budget that includes the direct cost to sub and the IDC to be applied.

Revisions to sub-award grant line budgets must include revisions to the IDC if the direct cost falls below the \$25k threshold. Remember all budget for a new grant line transfers from the prime grant line (usually – there can be other situations)

If cost share is required of subs a separate grant line for their cost share should be created for each sub. Be sure to report CS with each invoice so not to get behind. Also withhold payments if CS not provided with invoice.

# Sponsored Research Accounting Updates

## Proposed Changes to 2CFR200 Uniform Guidance

<https://www.wiley.law/alert-OMB-Proposes-Sweeping-Overhaul-of-Federal-Assistance-Regulations>

- **OMB Proposes Sweeping Overhaul of Federal Assistance Regulations**

- May 29, 2026

- **WHAT:** The Office of Management and Budget (OMB) issued a [proposed rule](#) that would revise the government-wide regulations for the management of federal grants, cooperative agreements, and other forms of federal financial assistance under 2 CFR, subtitle A. According to OMB, the proposed revisions are intended to improve transparency, accountability, and oversight for awards across the federal government, while also reducing the burden on recipients. Notable key provisions include:
  - Rebranding the existing “Uniform Guidance” at 2 CFR Part 200 as the “Uniform Grants Regulation” (UGR) and clarifying that the regulatory text of 2 CFR, subtitle A is “an OMB regulation” that carries “regulatory effect in [its] own right”;
  - Elimination of fixed-amount awards and fixed-amount subawards, which OMB found “can limit transparency and hinder effective oversight”;
  - New prohibitions on using federal awards to “fund, promote, encourage, subsidize, or facilitate” DEI policies;
  - A new prohibition on “discriminatory event services” by public entities receiving federal awards;
  - A new prohibition on “covered foreign collaborations” involving “covered foreign countries or covered foreign entities,” which extends the long-standing “Wolf Amendment” restrictions on collaboration with China across all federal financial assistance programs;
  - Expanded authority for “discretionary termination” of federal awards that “no longer effectuate program goals, Federal agency priorities, or the national interest” modeled on the FAR’s long-standing termination for convenience framework, as well as a new temporary suspension authority;

20

# Sponsored Research Accounting Updates

- Mandatory pre-issuance review of all discretionary awards by “senior appointees” (i.e., political appointees) who must apply specific principles including ensuring awards advance the President’s policy priorities;
- Mandatory participation in DHS’s E-Verify program and use of Treasury’s “Do Not Pay” system for recipient employees;
- Streamlined notices of funding opportunities, including mandatory posting on Grants.gov, a 500-word cap on executive summaries, and use of “Statements of Interest” to reduce applicant burden;
- Encouragement of multi-year awards to reduce the frequency of applications and individual awards generated each year; and
- New restrictions on allowable costs, including advertising and public relations, publication costs, conferences, and lobbying.

# Sponsored Research Accounting Updates

- **WHAT IT MEANS FOR RECIPIENTS:** OMB's proposed rule is issued pursuant to Executive Order 14332, "Improving Oversight of Federal Grantmaking" and a series of related Executive Orders. Consistent with that direction, OMB has organized the proposed revisions around three objectives: "(1) improving transparency, accountability, and oversight for use of Federal funds; (2) clarifying the status of the 2 CFR regulatory text as an OMB regulation; and (3) reducing recipient burden."
- OMB's proposed rule would impose significant new compliance obligations on recipients and subrecipients of federal financial assistance and would alter the legal status of the government-wide grant management system. Recipients that hold federal awards or anticipate applying for federal financial assistance should thus review the proposed rule carefully and consider submitting comments before the close of the comment period.

# Happy New Fiscal Year

We had another big year in G&C Accounting – although expenditures were about the same as last year, we are billing about half a billion dollars each year.

We have inactivated about 3,000 closed awards this year cleaning up our backlog from prior years.

Our new ChatBot on Financials and our Chatbot on Policy are in testing and late development. We will have them ready for campus soon. These are game changers for grant and policy inquires providing accurate and up to date answers without having to send emails.

Thank you all for supporting the mission of Georgia Tech!

# Award/Grant Exception Demo

**Douglas Feller**

Financial Manager - Sponsored Research Accounting


# Award/Grant Exception Reassign



Created: 06/03/2026 | Due: 06/10/2026 | Updated: 06/03/2026

**Print Generated Document** Review Documents for Request Process: Award/Grant Exception: Jamya S Amosun

## Documents

Document  [Award/Grant Exceptions 2026-06-03.pdf](#)

Instructions Grants & Contracts has found issues preventing the inactivation of an award. Please act on the information provided in the above document. Failure to act in a timely manner on the information provided could result in G&C moving expense off the award and onto cost share or cost overrun departmental accounts.

When all issues have been resolved, please select Submit to confirm action has been taken.

To access attachments associated with this request please follow these steps:

- Navigate to the Gear Icon (Task Actions) in the upper left hand corner of this window
- Select "View Details"
- Navigate to the "Details" tab next to the "My Actions" tab
- Scroll down and find the Attachments at the bottom of the table


Comment

# Award/Grant Exception Reassign

enter your comment



**View Comments (2)**

-  **David Lyons**  
Please clear overrun 2 weeks ago
-  **Douglas E Feller**  
Reassign to Douglas Feller Just now

**Process History**

-  **David Lyons**  
says, "Please clear overrun"  
Request- Step Completed 2 weeks ago
-  **Douglas E Feller**  
says, "Reassign to Douglas Feller"  
Review Documents- Step Completed Due 06/10/2026
-  **Douglas E Feller**  
Close Request- Awaiting Action

**Attachments**

Drop files here  
or

- 
- 
- 
-

# Award/Grant Exception Reassign

**All Items** 19 items

Search: All Items

[Advanced Search](#)

- Request Process: Award/Grant Exception: Jamya S Amosun** 06/22/2026 ☆  
Sent Back by Douglas E Feller
- Request Process: Change Grant Attributes: Amy Denelle Duke 06/18/2026 ☆  
Due: 06/22/2026
- Request Process: Request New Award Line/Grant: April A McCruel 06/18/2026 ☆  
Due: 06/22/2026

☆ ⚙️ 🗨️ Created: 06/22/2026

### Revise Request

Request Process: Award/Grant Exception: Jamya S Amosun

Grants & Contracts has found issue(s) preventing the inactivation of an award. Please take action on the information provided.

Request Request: Award/Grant Exception: Jamya S Amosun

Request Type Award/Grant Exception

Request ID (empty)

On Behalf Of ✕ Douglas E Feller ⋮


Description \* AWD-001536 Closeout

# Award/Grant Exception Reassign

☆ ⚙️ 📄 Created: 06/03/2026 | Due: 06/10/2026 | Updated: 06/03/2026

**Priority** **Document** Review Documents for Request Process: Award/Grant Exception: Daryll Whitehead

- Reassign
- View Details

**Document**  [Award/Grant Exceptions 2026-06-03.pdf](#)

**Instructions** Grants & Contracts has found issues preventing the inactivation of an award. Please act on the information provided in the above document. Failure to act in a timely manner on the information provided could result in G&C moving expense off the award and onto cost share or cost overrun departmental accounts.

When all issues have been resolved, please select Submit to confirm action has been taken.

To access attachments associated with this request please follow these steps:

- Navigate to the Gear Icon (Task Actions) in the upper left hand corner of this window
- Select "View Details"
- Navigate to the "Details" tab next to the "My Actions" tab
- Scroll down and find the Attachments at the bottom of the table

Comment

# Award/Grant Exception Reassign

☆ ⚙️ 📄 Created: 06/03/2026 | Due: 06/10/2026 | Updated: 06/03/2026

## Reassign This Task

To reassign a step, you must enter a reason in the Reassignment Reason field.

Business Process \* Review Documents for Request Process: Award/Grant Exception: Daryll Whitehead

My Tasks 1 item

Step	Business Process	Subject	Due Date	Proposed Person	Reassignment Reason
Review Documents	Review Documents for Request Process: Award/Grant Exception: Daryll Whitehead	Request Process: Award/Grant Exception: Daryll Whitehead	06/10/2026	[Redacted]	[Redacted]

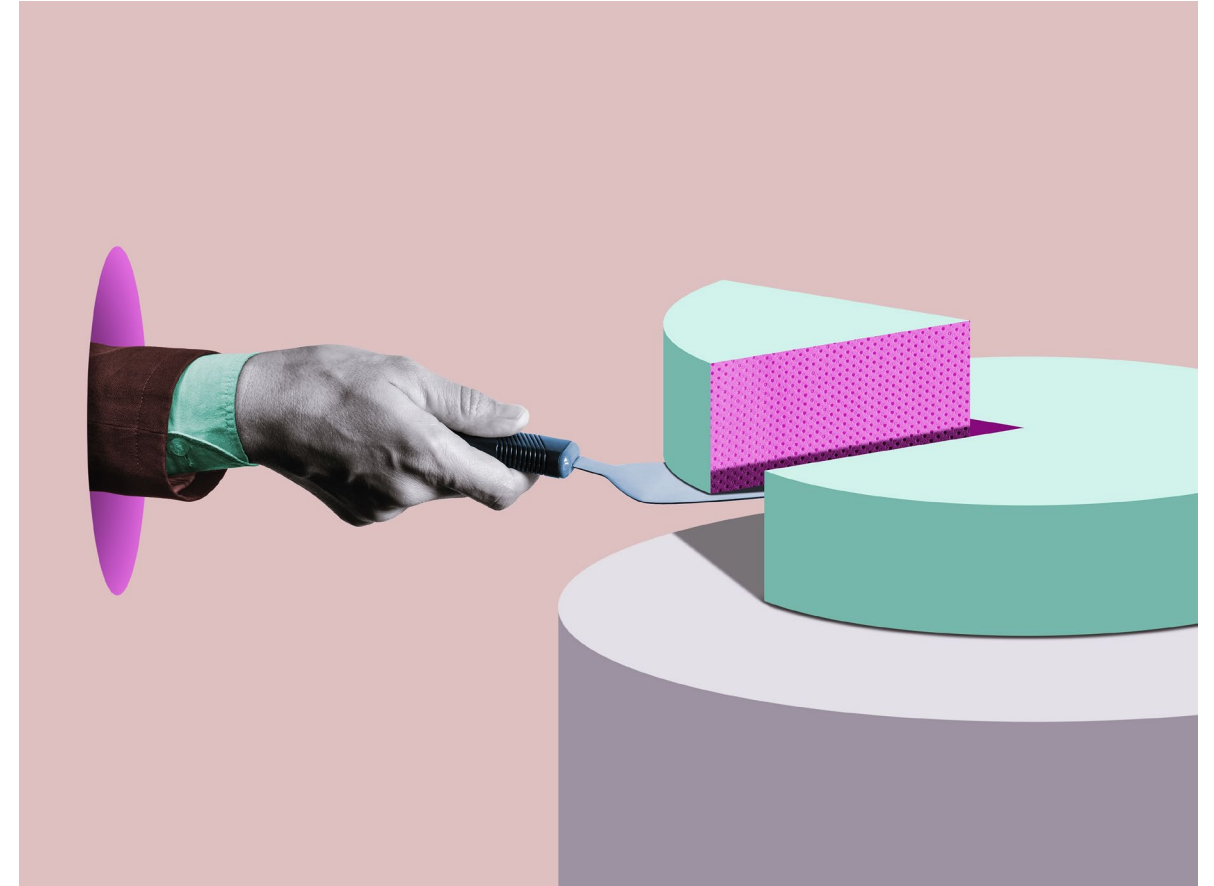
# Cost Accounting Updates

**Jonathon Jeffries**

Director - Cost Accounting

# FY25 Single Audit Corrective Action Plan – Maximum 98% Effort

- Employees charging salary to RI sponsored award are capped at 98% effort for FY26
- Exempted job titles: student employees, tech temps, post docs
- Final adjustment will be posted before year end and posted to department worktags
- An updated procedure document was posted to the G&C website under resources (<https://grants.gatech.edu/resources>)



# FY25 Single Audit Corrective Action Plan – Effort and Travel

- Best Practice is to align effort with travel on sponsored awards, exceptions require additional documentation.
- A report with expense reports charged to grants without effort has been distributed to impacted Grant Manager, PIs, and Deans during Q3.
- Responses are required for all and should either
  - Confirm an EDR to move a reasonable percentage of salary to the award, or move the travel costs off the award.
  - Prepare documentation to support why it is acceptable for there to be travel costs on an award with no salary/effort reflected.
- Exception documentation must be stored in department and provided to audit upon request.



# Year End Effort Compliance - NIH

- A final email was sent out for employees requiring an adjustment (EDR) based YTD
- Adjustments MUST be completed by the department by Year End Close
- Additional year end adjustment will be processed with a manual Prior Year JE
- Please reach out if you have an employee that may be in violation and requires an analysis due to Summer Pay
- Question – [jonathon.Jeffries@business.gatech.edu](mailto:jonathon.Jeffries@business.gatech.edu)



# ASRs (Annual Statement of Reasonableness)

- Available for online certification by noon on July 17<sup>th</sup>
- Employees should certify electronically if currently employed
- If you have a question or a concern regarding your ASR (such as incorrect effort charged to a sponsored grant), please reach out to your Unit Financial Manager
- Federal Work Study students will not receive ASRs
- Initial ASR deadline is August 28<sup>th</sup>
- Manual ASRs for corrections or termed employees will be available as needed
- Lots of new resources available, please partner with us to get this done
- If you have any questions or issues regarding ASRs, please reach out to the helpdesk email ([asr.ask@office365.gatech.edu](mailto:asr.ask@office365.gatech.edu))



# FY27 Rates (F&A, Fringe, GSTRP)

Activity (1)	FY 2018 Rates	FY 2019 Rates	FY 2020 Rates	FY 2021 Rates	FY 2022 Rates	FY 2023 Rates	FY 2024 Rates	FY 2025 Rates	FY 2026 (3)(4) Rates	FY 2027 (3)(4) Rates
<b>Facilities &amp; Administrative Rates:</b>										
<b>Research - On Campus</b>										
Capped	57.8%	57.8%	57.8%	58.2%	58.2%	58.2%	57.4%	57.4%	57.4%	57.4%
Uncapped (DoD Contracts)	62.0%	62.0%	62.0%	64.6%	64.6%	64.6%	66.5%	66.5%	66.5%	66.5%
<b>Research - Off Campus</b>										
Capped	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%
Uncapped (DoD Contracts)	30.2%	30.2%	30.2%	32.4%	32.4%	32.4%	35.2%	35.2%	35.2%	35.2%
<b>Other Sponsored</b>										
	34.82%	34.82%	34.82%	35.90%	35.90%	35.90%	36.70%	36.70%	36.7%	36.7%
<b>Instruction</b>										
	53.92%	53.92%	53.40%	53.40%	53.40%	53.40%	52.80%	52.80%	52.80%	52.80%
<b>Industrial (Non-Government) (2)</b>										
	63.8%	63.80%	63.80%	64.60%	64.60%	64.60%	66.50%	66.50%	66.50%	66.50%
<b>Graduate Student Tuition Remission:</b>										
GSTRP (Monthly)	\$ 1,526	\$ 1,526	\$ 1,557	\$ 1,557	\$ 1,557	\$ 1,557	\$ 1,557	\$ 1,596	\$ 1,596	\$ 1,612
<b>Fringe Benefits Rates:</b>										
Graduate Student Health Insurance	6.5%	6.5%	6.2%	6.1%	5.4%	5.7%	7.3%	7.9%	7.3%	6.8%
Full Benefits	29.8%	31.9%	31.9%	32.3%	32.6%	31.7%	31.7%	31.7%	33.4%	34.1%
Limited Benefits	20.8%	23.1%	23.3%	23.4%	23.5%	23.1%	23.8%	23.9%	24.5%	24.2%
Partial Benefits	1.4%	1.4%	1.5%	1.5%	1.4%	1.4%	1.5%	1.5%	1.4%	1.4%

# Service Centers

## Part 3: Common Pitfalls to Avoid (and How to Fix Them)

**Andrew Chung**

Cost Accountant II

*Office of Grants & Contracts Accounting*

# What Each Part Covers

Each part builds on the last — understanding the model and the math makes the pitfalls easier to spot

## ✓ Part 1 — Choosing the Model

- ▶ Choosing the right model
- ▶ Purpose test & utilization test
- ▶ Alternatives to a service center
- ▶ Mixed-purpose separation requirements

## 🔧 Part 2 — Building the Rate

- ▶ Rate construction mechanics
- ▶ Allowable vs. unallowable costs
- ▶ Usage tracking & annual rate validation
- ▶ Billing methods by user type

## ⚠️ Part 3 — Pitfalls to Avoid

- ▶ Four cost-principles pitfalls: allowability, allocability, reasonableness, consistency
- ▶ F&A budgeting, external billing & free-usage pitfalls
- ▶ Audit findings, uniform pricing & key takeaways

💡 **Parts 1 & 2 are complete** — *today we apply those foundations to the common pitfalls that cause audit findings*

🔑 **Key takeaway:** *You know the model and the math — now see where things go wrong and how to fix them*

# Pitfall #1 — Charging Unallowable Costs in the Rate

A rate holds only allowable, allocable, and reasonable costs — burying an unallowable one doesn't make it allowable


## The Mistake


*"Just include everything — we'll sort it out later"*


- ▶ Putting entertainment, alcohol, hospitality, or other unallowable costs in the rate
- ▶ Putting equipment in the rate at full purchase price, not depreciation
- ▶ Embedding F&A-type overhead in the rate — costs not allowable as direct service charges
- ▶ **Result: these costs inflate the rate's cost base, so the rate comes out too high — overcharged users and audit exposure**
  - Every paying user is charged the inflated amount
  - Auditors disallow the cost and claw back funds

## The Fix

- ▶ **Screen every cost in the rate against 2 CFR §200, Subpart E**
- ▶ Keep these unallowable costs out of the rate:
  - Entertainment, alcohol, fines, lobbying, fundraising
- ▶ **Charge equipment to the rate by depreciation — not purchase price**
- ▶ Keep F&A-type costs out of the rate — charge only direct service costs
- ▶ Pay unallowable costs from departmental funds, not the rate
- ▶ *When in doubt, consult G&C Cost Accounting before finalizing the rate*

 **Example:** A lab builds a \$500K instrument at full purchase price and \$3K in conference catering into the service center rate → auditor flags both: the instrument must be depreciated, the catering is unallowable.

 **Key terms:** **Allowable cost** — permitted under 2 CFR §200, Subpart E. · **Unallowable cost** — expressly barred (entertainment, alcohol, fines, lobbying). · **Depreciation** — spreading an asset's cost over its useful life, not expensing it at purchase. · **F&A** — Facilities & Administrative (indirect) overhead, recovered separately from the rate.

 **Principle: Allowability (2 CFR §200.403)** — A cost is allowable only if the federal cost principles and your grant's terms permit it — and it isn't on the unallowable list.

 **Key takeaway:** *If a cost is unallowable, hiding it in the rate only inflates the rate and invites an audit finding*

# Pitfall #2 — Misallocating Shared Costs Across Projects

A shared cost belongs to every project it benefits — spread it across all users, not loaded onto one grant


## The Mistake


*"Just charge it to whichever grant has budget left"*


- ▶ Charging a shared, multi-user cost to one grant instead of spreading it across users
- ▶ Choosing that grant by convenience, not by which project actually benefits
- ▶ Splitting the cost evenly instead of by each project's actual benefit
- ▶ Spreading the cost with no documented method for how it was split
- ▶ **Result: one grant is overcharged — compliance exposure for all**
  - Undercharged grants don't pay their fair share
  - One bad split casts doubt on the allocation method, exposing the whole portfolio

## The Fix

- ▶ **Quick test: "Does this benefit more than one user?"**
  - If YES → spread it across users — via the rate or a documented allocation
  - If NO → direct charge to the specific project
- ▶ Service center rate spreads ongoing shared costs fairly:
  - Recurring calibration and maintenance time
  - Equipment readiness and quality assurance
- ▶ Document the allocation method and rationale — keep it on file
- ▶ Re-check the original split when a project's share shifts meaningfully
- ▶ *Service centers are for ongoing, shared use — a single project should be direct-charged, not run through a rate*

 **Example:** Technician spends 2 hours setting up equipment used by 5 labs → cannot charge all 2 hours to one grant → it must be spread across all 5 labs — through a service center rate or a documented manual allocation. A one-time setup is non-recurring, so manual allocation fits better.

 **Key terms:** **Service center rate** — an approved rate charged to users to recoup operating costs. · **Direct charge** — charge a cost directly to the benefiting project, rather than bundling it into a shared or indirect rate.

 **Principle: Allocability (2 CFR §200.405)** — A cost is allocable to a project in proportion to how much that project benefits.

 **Key takeaway:** Spread a shared cost across all users — via a rate or documented allocation, never loaded onto a single grant

# Pitfall #3 — Using Assumptions You Can't Defend in the Rate

A rate must be reasonable — defensible amounts, realistic assumptions, and no inflated costs


## The Mistake


*"The rate looks about right — good enough"*


- ▶ Budgeting labor into the rate with no effort data or rationale
- ▶ Paying above-market prices for cost inputs — then carrying that inflated cost in the rate
- ▶ Projecting usage behind the rate with no documented rationale or supporting data
- ▶ Setting the rate to hit a recovery target instead of to actual cost
- ▶ Choosing a higher-priced supplier with no justification on file
- ▶ **Result: rate doesn't reflect reality — fails the prudent person test**
  - Auditors challenge the rate as unsupported
  - Indefensible amounts get disallowed and clawed back


## The Fix

- ▶ **Apply the prudent person test (2 CFR §200.404):**
  - Would a prudent person pay this amount?
  - Is the cost consistent with market rates?
  - Does sound business practice support how the figure was set?
- ▶ **Use actual costs if you have history; estimate if you don't:**
  - New center? Build projected usage from equipment capacity and committed demand — not a guess
  - Benchmark cost inputs against vendor quotes and market prices
  - Established rate? Base it on actual spending and usage
- ▶ Document why a supplier was chosen if priced above market
- ▶ *Run the SCARV each year — reconcile the provisional rate to actual costs and lower any rate that persistently over-recovers*

 **Example:** Lab builds reagent costs into the rate at \$150/unit instead of the \$80 market price → no prudent person would pay nearly double → auditor flags the rate as unreasonable.

 **Key terms:** **Prudent person test** — the reasonableness yardstick: market-aligned pricing and sound business practice. · **Service Center Annual Rate Validation (SCARV)** — the annual check of over- or under-recovery. · **Provisional rate** — a starting rate set on estimates, reconciled via the SCARV once actuals exist.

 **Principle: Reasonableness (2 CFR §200.404)** — A cost is reasonable if a prudent person, following sound business practice, would pay that amount.

 **Key takeaway:** Every cost in your rate must pass the prudent person test — defensible amounts backed by actual costs or benchmarks



## Pitfall #4 — Treating the Same Cost as Both Direct and F&A Under Like Circumstances

**A cost is either direct (in the rate) or F&A — classify it the same way every time it serves the same purpose**


### ✗ The Mistake


*"Last time we took it as F&A — this time just put it in the rate"*

- ▶ Charging an admin cost direct in the rate for one user, but as F&A for another with no real change in circumstances
- ▶ Shifting it to F&A for a user who won't pay the higher direct rate — just to maximize recovery
- ▶ **Result: the same cost treated two ways — a consistency violation**
  - Auditors flag the inconsistent treatment as a finding
  - Disallowed costs get clawed back from the grant

### ✓ The Fix

- ▶ **Decide once — direct (in the rate) or F&A? — then apply that treatment consistently**
- ▶ Classify by the cost's purpose — not by which user will pay the higher rate
- ▶ Different treatment is fine only when circumstances truly differ — e.g., dedicated project work (direct) vs. routine office admin (F&A)
- ▶ *When a cost's treatment is unclear, confirm direct vs. F&A with G&C before it goes in the rate*

 **Example:** An admin coordinator's time is charged direct in the rate for one user but recovered as F&A for another in the same situation → the same cost treated differently (a consistency violation). Treating it differently is only acceptable when the circumstances genuinely differ — e.g., dedicated project work vs. routine office admin.

 **Key terms:** **Direct cost** — charged to the benefiting project, recovered in the rate. · **F&A** — Facilities & Administrative (indirect) overhead, recovered separately from the rate. · **Purpose** — the kind of work a cost serves, not why you spend the money: dedicated project work → direct; routine operations → F&A. · **Like circumstances** — the cost serves the same purpose under comparable conditions — e.g., an admin coordinator's routine time, whether for Lab A or Lab B.



**Principle: Consistency (2 CFR §200.403(d))** — In like circumstances, the same cost is direct or F&A — never both, unless they truly differ.



**Key takeaway:** Treat each cost the same way in like circumstances — direct (in the rate) or F&A, never both, unless they truly differ

# \$ Three Operational Gaps — Budgeting, Billing & Free Usage

Beyond the four cost principles — F&A budgeting, external billing, and free usage quietly distort cost recovery

## ✗ The Mistake

### \$ F&A Budgeting — forfeits F&A recovery

- ▶ "F&A's already baked into the rate" — so it's left off the proposal, and the award can't cover the F&A charged on top

### External Billing — forfeits F&A recovery

- ▶ "Bursar adds F&A automatically" — it doesn't: that way recovers no F&A, and no contract protects the unit if they don't pay

### FREE Free Usage — overcharges paying users

- ▶ "It's free, so it doesn't count" — leaving free usage out spreads the cost over fewer units and inflates the rate for paying users

## ✓ The Fix

### \$ F&A Budgeting → Cost Segregation

- ▶ Budget F&A as a separate line on top of the service center rate, so the award covers both — at the correct sponsor F&A rate (federal cap vs. industry vs. state)

### External Billing → Cost Segregation

- ▶ Build the rate first (documented, G&C-validated), then apply it through an SSA, which adds F&A and contract protection. With Bursar, add F&A yourself

### FREE Free Usage → Allocability

- ▶ Bill every paying user at the approved rate, and count all usage — including free — when you set the rate

**Bottom line:** *The first two forfeit F&A the Institute is legally owed, while free usage inflates rates for paying users — budget for F&A, bill through an SSA when you can, and count all usage in the rate. Exception: an F&A waiver approved up front — like the one on PACE services — is deliberate, not an accidental loss.*

**Key terms:** **F&A** — Facilities & Administrative (indirect) overhead, recovered separately from the rate. · **Specialized Service Agreement (SSA)** — the legal contract with an external customer. · **Free usage** — use of a service center at no charge. · **PACE** (Partnership for Advanced Computing Environment) — compute and storage for faculty and students.

**Principles: Cost Segregation & Allocability (2 CFR §200.412, .405)** — Costs are classified as direct or indirect (F&A), and each cost is allocated to the activities that benefit from it.

**Key takeaway:** *Past the cost principles, the real risk is F&A and usage gaps — not the rate math itself*



# What Actually Causes Audit Findings

Most findings aren't complex — they're recurring red flags that trace back to the four cost principles — plus uniform pricing

## ✘ Execution Failures

- ▶ **Unallowable costs in the rate** → **Allowability**
  - Entertainment, alcohol, or hospitality in the rate
  - Equipment at full cost instead of depreciation
- ▶ **Costs charged to the wrong project or category** → **Allocability**
  - Shared costs loaded onto one grant instead of spread through the service center rate, or sponsored costs on the wrong project
- ▶ **Same cost treated as both direct and F&A** → **Consistency**
  - Direct for one user, F&A for another in like circumstances

## 📄 Documentation Failures

- ▶ **No documentation behind the rate** → **Reasonableness**
  - Cannot show how the rate was built or last validated
  - Persistent over-recovery signals the rate is too high
- ▶ **Weak or missing usage records** → **Allocability**
  - No audit trail for free usage
- ▶ **No billing records tied to the approved rate** → **Uniform Pricing**
  - Cannot show each user was charged the correct published rate
  - Users may have been charged a "rogue," unapproved rate

📖 **Key term: Uniform Pricing** — an additional principle beyond the four cost principles: the consistent, published rate a service center charges for a given service. It's non-discriminatory — federal users are never charged more than others, though external customers may be charged more.

📄 **Example:** *A service center cannot explain how the rate was built, has no backup documentation → fails audit even if the rate itself was reasonable.*

✅ **What good looks like:** *a rate you can reconstruct on demand — documented build, consistent treatment, and billing tied to the published rate.*

🔑 **Key takeaway:** *The rate doesn't have to be perfect — but it must be documented, consistent, and explainable*



# Keep It Simple — Final Takeaways

Master these three habits — apply the cost principles, budget for F&A, and document your basis — and you stay clear of every pitfall below

## Cost Principles · Pitfalls #1–4


- ▶ Keep unallowable costs out of the rate → **Allowability**
- ▶ Spread shared costs across benefiting projects → **Allocability**
- ▶ Use actual costs; benchmark new ones → **Reasonableness**
- ▶ Treat each cost the same way in like circumstances → **Consistency**
- ▶ Document the basis (the reasoning and data behind a figure) for every assumption → **all of them**

## Billing & Operations · Three Operational Gaps

- ▶ Build rates from direct costs only — no F&A embedded
- ▶ Budget for F&A on top of every service center charge
- ▶ Use a Specialized Service Agreement (SSA) for external customers when you can
- ▶ If using Bursar, manually calculate and include F&A
- ▶ Validate rates each year — adjustments need G&C approval

 **Want to go deeper?** Join our Advanced Service Center class — covers all three parts in detail with applied scenarios to solidify your understanding.

 **Questions on service center matters?** Contact the EASR Helpdesk: [easr.ask@office365.gatech.edu](mailto:easr.ask@office365.gatech.edu)

 **Key takeaway:** *Get the cost principles right, budget for F&A, and use an SSA — your rates and billing will hold up under audit*

# How to Request a Mass Grant Manager Change via ServiceNow

**Tony Wang**

Business Analyst

# Change Grant Attributes Limitation

- We have identified a limitation in the **Change Grant Attributes** system in Workday regarding the number of grants that can be processed in a single request, and we are actively working on a solution.
- Until a permanent fix is implemented, please submit a **ServiceNow Mass Grant Manager Change Request** ticket for any updates involving **more than 10 grants**, as shown in this presentation.
- For instructions on requesting a Grant Manager update in Workday using the Change Grant Attributes system (which is automatically updated by the system), please refer to my Latest Buzz presentation from **September 18, 2025**.
- Reference Link: <https://grants.gatech.edu/latest-buzz-gc-accounting>

**Change Grant Attributes**

Request to update attributes related to the grant, including: grant name, grant status, grant cost center.

Describe the Request \* change grant manager

Please provide information related to the grant attribute updates.

What existing Grant ID does this relate to?  
Example: GR12345678

For multiple grants, separate each ID with a comma (,) and do not use spaces.  
Example: GR12345678,GR87654321  
(Required)

GR12345678,GR87654321 (No more than 10 grants)

Would you like to change the grant name?

Yes  
 No

Would you like to change the grant status?

Yes  
 No

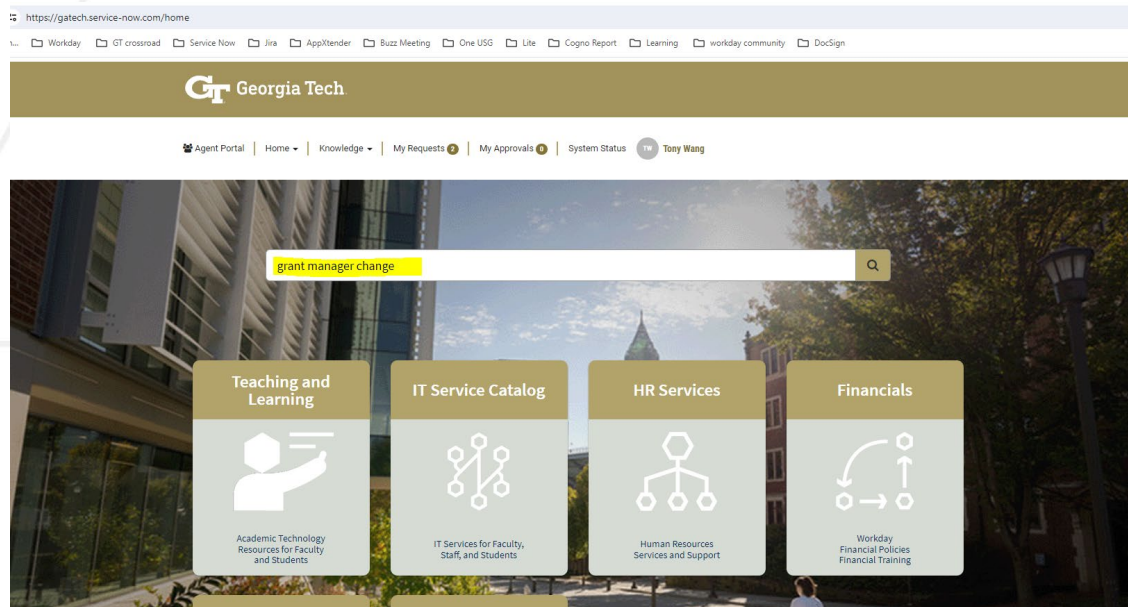
Would you like to change the cost center?

Yes  
 No

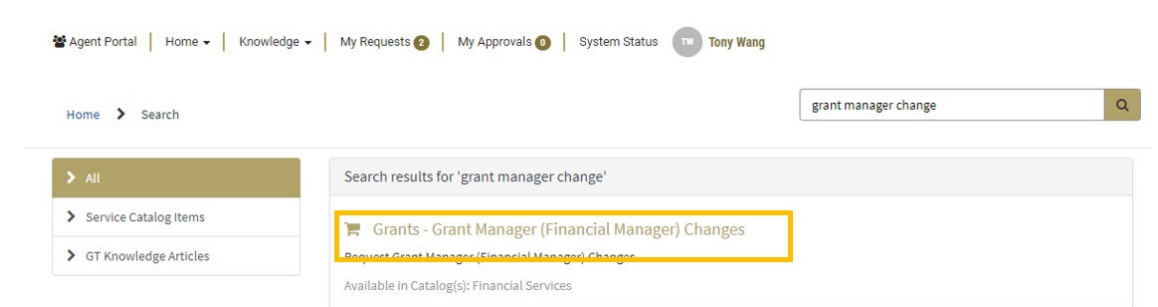
Submit Save for Later Cancel

# Steps for Requesting a Mass Grant Manager Change via ServiceNow

1. Go to <https://gatech.service-now.com/home>, type Grant Manager Change in the search bar



2. Click on Grants - Grant Manager (Financial Manager) Changes



# Steps for Requesting a Mass Grant Manager Change via ServiceNow

3. Fill out all the required fields, select Grant Number(s) to Person in the type of grant manager change field.

Grants - Grant Manager (Financial Manager) Changes

Request Grant Manager (Financial Manager) Changes

\* Indicates required

\* Preferred Contact Method

Email

\* Requested By

Tony Wang (Grants & Contracts Accounting)

Finance Director for your organization

Select one

Person to Person

Cost Center to Person

**Grant Number(s) to Person**

Award Number(s) to Person

Principal Investigator (PI) to Person

Select one

Justification

\* Justification for this request

Please describe the justification for this request

# Steps for Requesting a Mass Grant Manager Change via ServiceNow

4. In the Grant Number to transfer field, select any one grant from your file list and assign the new Grant Manager.
5. In the Justification field, indicate that this is a mass Grant Manager change and that the file is attached (see example).
6. Click Add Attachment to upload the Excel file containing the full list of Grant IDs and the new Grant Manager name.
7. Click Submit Request to submit the ticket.

\* Preferred Contact Method  
Email

\* Requested By  
Tony Wang (Grants & Contracts Accounting)

\* Contact Information  
tony.wang@business.gatech.edu

Financial Director

\* Are you the Financial Director for your organization?  
No

\* Finance Director for your organization

Grant Change Information

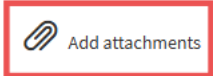
\* What type of Grant Manager change is required?  
Grant Number(s) to Person

\* Grant Number(s) to transfer **Just pick one grant**  
You can add multiple Grant numbers

\* New Grant Manager

Justification

\* Justification for this request  
Please see the attachment for a mass grant manager change

 Add attachments

# Reminder

- To avoid delays, please use the instructions in the slides for mass Grant Manager changes (more than 10 grants). This is the fastest way to ensure the ticket is routed directly to me. These requests will be completed within 2 business days.
- Please note that G&C does not process DE and GTF worktag changes. For these requests, please use the appropriate ServiceNow forms below:
- **DE worktag changes:** [https://gatech.servicenow.com/home?id=sc\\_cat\\_item&sys\\_id=c5dcddd7dbf17300391b9837db96199d](https://gatech.servicenow.com/home?id=sc_cat_item&sys_id=c5dcddd7dbf17300391b9837db96199d)
- **GTF worktag changes:** [https://gatech.servicenow.com/financials?id=sc\\_cat\\_item&sys\\_id=e43ddb33dbb13700fc9efe8d0f96197e&sysparm\\_category=d92cb59bdba9bb00fc9efe8d0f96192f](https://gatech.servicenow.com/financials?id=sc_cat_item&sys_id=e43ddb33dbb13700fc9efe8d0f96197e&sysparm_category=d92cb59bdba9bb00fc9efe8d0f96192f)

# Training Updates

**Lee Broxton, M.Ed., CRA**

Associate Director – Research Education

Research Education & Support Services Directorate

Office of Research Operations & Infrastructure (ROI)

# WHAT'S THE BUZZ IN RESEARCH ADMINISTRATION



**JULY 29, 2026**  
**DALNEY 180 & VIRTUAL**

**LUNCH: 11:15AM - 11:30AM**  
**EVENT: 11:30AM - 2:00PM**

**CLICK [HERE](#) TO REGISTER**

Live Classes Done until the Fall!



# Overview of GT Internal Certification Programs

## • Basic Certification

- Introduction to the Research Enterprise at Georgia Tech
- What are GTRC & GTARC?
- Mentor Panel Discussion and Networking

## • Intermediate Certification

- Pre-Award Proposal Preparation and Submission
- Pre-Award Budgeting, IDC, & Cost Principles
- Pre-Award Activities
- Post-Award Management & Financial Compliance
- Post-Award Management & Research Compliance
- Post-Award Activities
- Internal Controls Workshop
- 2 CFR 200 Workshop (or) FAR Webinar Series
- How To Courses (topic-specific)
- Georgia Tech Systems Courses
- Sponsor-Specific Courses



## • Advanced Certification

- Advanced Budgeting
- Allowable & Allocable Costs
- Assimilating New Compliance Requirements
- Audit Findings – Effort & Compensation
- Costing
- Non-Compliance
- Membership Agreements \*coming soon
- Service Centers

## • Graduate / Postdoc / Early Career Development Series

- Proposal Preparation & Submission Process
- Budget Preparation
- Post-Award Management

# Current Professional Development Opportunities

[Saba Quest LMS](#) – Sign in with GT credentials and register!

Other courses have been published to the LMS – Check out the Calendar & Learning Catalog!

## SELF-PACED / ON-DEMAND COURSES

- *Introduction to the Research Enterprise at GT*
- *What are GTRC and GTARC?*
- *Fun with the FAR*
- *Dfun with the DFARS*
- *NCURA: AI in Research Administration: Unlocking Efficiency and Innovation*
- *NCURA: Avoid “Returned without Review....” An In-depth Look at Agency RFPs*
- *NIH Data Management & Sharing Policy – Budgeting/Application Tips (NCURA)*
- *Managing SBIR/STTR Projects (NCURA)*
- *NIH Proposal Preparation & Review Tips*
- *NIH F Series--Fellowship Programs*
- *NIH Fundamentals (NCURA)*
- *NSF Fundamentals (NCURA)*
- *NSF Proposal Preparation & Review Tips*
- *NSPM-33 Compliance (NCURA)*
- *Advanced Research Projects Agency for Health (ARPA-H):*
  - *Introduction and Q&A*
  - *Budget Workshop*
  - *Terms & Conditions Workshop*
- *Service Centers and Best Practices*
- *Service and Recharge Center Costing Strategies Amidst Evolving Federal Funding Policies*
- *Specialized Service Agreements*
- *Subawards - Request, Monitor, Risk*
- *Effort Reporting*
- *Contract Information Systems (CIS)*
- *Cost Share*
- *Cost Transfers*
- *Pivot: Finding Funding*
- *ORCID iD*
- *How Funding Decisions Really Work*

# GT Certification Contact Hours & CEU credit



Approved by RACC to use for your CRA, CPRA, and CFRA recertification hours!



## Georgia Tech's Certified Research Administrator (CRA) Study Group

[Welcome!](#) | [General Information](#) | [Modules](#) | [Discussion Forum](#) | [Live Virtual Sessions](#)



### Welcome to Georgia Tech's Certified Research Administrator (CRA) Study Group!

Our Certified Research Administrator (CRA) Study Group will help to prepare you to sit for the upcoming certification exam, offered by the [Research Administrators Certification Council \(RACC\)](#).

Our content is set-up in **11 modules**, with additional helpful resources throughout. Most of it is available asynchronously/on-demand (videos, presentation slides, quizzes). Some may prefer to take each of these on a weekly basis, leading up to the upcoming exam window.

With fun-filled topics ranging from the Uniform Guidance (2 CFR 200) to Effort Reporting and Subawards – and almost everything in between, there will surely be something for everyone.

There are also **three live/virtual sessions** to debrief and discuss the modules:

- **Modules 1-4:** March 20, 12:30pm-2:00pm ET
- **Modules 5-8:** April 10, 12:30pm-2:00pm ET
- **Modules 9-11, Final Discussion:** May 1, 12:30pm-2:00pm ET

**Note:** The Research Administrators Certification Council (RACC) is actively updating all its materials in accordance with changes to the Uniform Guidance (2 CFR 200) announced in April 2024 and effective beginning October 1, 2024.

As of **July 1, 2025**, references to the Uniform Guidance in all RACC exams (CRA, CFRA, and CPRA) and practice exams **reflect the revised guidance**.

**Note:** Completing these 11 modules will not guarantee a passing score on the exam. Individuals should expect to spend additional time preparing for the exam. Special focus and additional time should be allotted in subject areas and concepts where you are less familiar.

CRA, Certified Research Administrator certification is copyrighted by the Research Administrators Certification Council (RACC). These materials are intended to provide resources for those preparing to take the CRA exam and for those wanting to learn more about research administration. These materials are not endorsed by RACC. There is no guarantee that using these materials will help you pass the exam. These materials do not contain any inside information on the content of the exam beyond what is available on the RACC website.



# CRA Study Group at Georgia Tech

<https://sites.gatech.edu/gtcra/>

**Your future in research administration starts here.**

Click below to jump into **General Information** tab to begin to prepare for the CRA exam.

You can also use the navigational headers at the top of the page, noting that the quizzes within the modules are password protected for tracking purposes. Reach out to [training@osp.gatech.edu](mailto:training@osp.gatech.edu) with any questions!

**LET'S JUMP IN!**

# NYU's Research Administration Demonstration (RAD) Series



## Recent and Upcoming topics include:

Leadership Roles In Research Administration

Post Award Issues For The Departmental Administrator

Recruiting And Identifying New Research Administrators

Running Your Own Institutional Self-Assessment For Research Administration

The Importance Of Storytelling In Making A Business Case For Compliance

Research Award Terms And Conditions – From Negotiation To Adherence And Compliance

Welcome To Our World Of Infinite Possibilities

Post Award Costing And Operations From Project Setup To Closeout

Artificial Intelligence In Higher Education: Legal Framework, Governance, And Use Cases In Research Administration

Breaking Down Silos: Creating Collaborations On Your Campus

Demystifying The Role Of The Institutional Official, Including Mechanisms For Managing Up

Measuring The Impact Of Research – Beyond Citations

Post Award Impacts For The 2024 UG Changes

Developing A Career In Research Administration By Using Your Transferable Skills

F&A Primer

COGR Update & Your Response/Action Items

<https://wp.nyu.edu/nyuresearchrad/>

**CEU Hours Available!**

**RSVP for upcoming RAD sessions via their [online registration](#).**



# THANK YOU!

Any additional questions or other  
course recommendations,  
please let us know.

[ResearchTraining@gatech.edu](mailto:ResearchTraining@gatech.edu)

**NOTE: New Email Box Address**

THANK YOU!



GRANTS.GATECH.EDU