

The Latest Buzz with G&C Accounting

Monday, November 27, 2023
1:00 – 2:30 PM



Agenda

Topic	Presenter(s)
Welcome, Post Award Research Updates	Josh Rosenberg
Commitment Accounting Updates	Jason Cole
Project Accounting Updates	Glenn Campopiano
Compliance Updates	Charles Derricotte III
F&A Reports Demo	Justin Yoo
Workday and Reporting Updates	Amy Zhang
Training Updates	Rob Roy
Closing	Josh Rosenberg

Post Award Research Updates

Josh Rosenberg

Exec. Director, Grants and Contracts

RI Sponsored Programs

AWARD DATA: FY20 – 24 (YTD through Period 4: October)

AWARDS: Cumulative Report thru: OCT.					
College/Unit	FY24		FY23		Award Dollar Variance
	Awarded Amount	Awards	Awarded Amount	Awards	
COMP	\$ 18,922,871	70	\$ 22,937,804	67	-17.5%
COS	\$ 32,744,725	125	\$ 23,094,439	125	41.8%
DSGN	\$ 3,801,606	225	\$ 4,357,029	184	-12.7%
ENGR	\$ 141,823,595	451	\$ 141,194,426	481	0.4%
GTRI	\$ 358,552,582	365	\$ 320,792,987	355	11.8%
IAC	\$ 4,302,476	23	\$ 4,986,191	30	-13.7%
OTHERS	\$ 43,087,024	153	\$ 54,657,561	126	-21.2%
SCB	\$ 480,966	3	\$ 638,207	5	0.0%
Total	\$ 603,715,847	1,415	\$ 572,658,645	1,373	5.4%
Resident Instruction and Other	\$ 245,163,264	1,050	\$ 251,865,657	1,018	-2.7%

Awards		
	YTD (Oct.)	Full Year
FY24	\$ 245,163,264	\$ 512,798,649
FY23	\$ 251,865,657	\$ 512,798,649
FY22	\$ 220,310,822	\$ 443,169,708
FY21	\$ 190,602,504	\$ 415,738,536
FY20	\$ 170,390,579	\$ 402,520,391

Key Takeaways:

- Awards for Georgia Tech totaled \$603.7 million.
- On the RI side, awards decreased 2.7% to \$245.2 million.
- The biggest difference year over year on the RI side was from the Department of Commerce, with approximately \$11 million more in funding in FY23 than in FY24.
- With 8 months to go in the fiscal year, I will project flat award growth on the RI side and will revisit in Q3.

RI Sponsored Programs

SPONSOR AWARD DATA: FY23 – 24 (YTD through Period 4: October)

RI NEW AWARDS (Through October)						
Federal Agency or Sponsor Type	FY24	% of RI Portfolio	FY23	24 v. 23 \$ Variance	24 v. 23 % Variance	5 Year Avg
NATIONAL SCIENCE FOUNDATION (NSF)	\$ 71,475,731	29%	\$ 70,337,584	\$ 1,138,147	2%	\$ 59,874,445
DHHS	\$ 38,597,514	16%	\$ 25,938,293	\$ 12,659,221	49%	\$ 26,948,025
US DEPT OF ENERGY	\$ 25,175,255	10%	\$ 17,968,437	\$ 7,206,818	40%	\$ 19,876,847
INDUSTRIAL SPONSORS	\$ 17,353,030	7%	\$ 25,561,173	\$ (8,208,143)	-32%	\$ 21,006,549
COLL/UNIV/RES INSTITUTES	\$ 15,970,828	7%	\$ 16,676,116	\$ (705,288)	-4%	\$ 17,009,245
US DEPT OF COMMERCE	\$ 14,671,594	6%	\$ 25,602,436	\$ (10,930,842)	-43%	\$ 11,454,543
NASA	\$ 11,265,143	5%	\$ 5,981,330	\$ 5,283,813	88%	\$ 7,826,068
INDUS RES INST/FDNS/SOC	\$ 8,998,641	4%	\$ 13,510,919	\$ (4,512,277)	-33%	\$ 11,793,895
ARMY	\$ 8,456,691	3%	\$ 9,379,296	\$ (922,605)	-10%	\$ 4,743,526
NAVY	\$ 8,249,072	3%	\$ 9,552,109	\$ (1,303,037)	-14%	\$ 6,092,525
AIR FORCE	\$ 6,222,568	3%	\$ 7,505,573	\$ (1,283,005)	-17%	\$ 4,532,739
US DEPT OF DEFENSE	\$ 3,752,298	2%	\$ 1,548,730	\$ 2,203,568	142%	\$ 3,561,677
GOVT-OWNED/CONTRACTOR OP	\$ 3,619,034	1%	\$ 2,977,218	\$ 641,816	22%	\$ 3,098,452
ENVIRONMENTAL PROTECTION AGENCY	\$ 2,123,000	1%	\$ 749,999	\$ 1,373,001	183%	\$ 930,745
STATE & LOCAL GOVERNMENT	\$ 1,686,883	1%	\$ 5,400,181	\$ (3,713,298)	-69%	\$ 3,993,970
Grand Total	\$ 245,163,265	100%	\$ 251,865,657	\$ (6,702,392)	-2.7%	\$ 218,087,426

Key Takeaways:

- Top 15 sponsor types/agencies by award dollars in FY24 listed above; totals at the bottom reflect awards from all sponsors.
- As noted earlier, the biggest decrease is from the Department of Commerce (\$25.6 million in awards in FY23 versus \$14.7 million in FY24). DHHS and the Department of Energy were the biggest areas of award growth.

RI Sponsored Programs

EXPENSE DATA: FY20 – 24 (YTD through Period 4: October)

Expenditure Analysis: OCT.	FY24 YTD	FY23 YTD	Change
Salaries and Wages	\$ 49,105,760	\$ 46,610,718	5.4%
Subcontracts	\$ 24,552,255	\$ 19,416,334	26.5%
Tuition Remission	\$ 10,759,690	\$ 10,573,078	1.8%
Other Direct Costs	\$ 14,672,937	\$ 12,205,384	20.2%
M&S	\$ 9,432,374	\$ 9,776,894	-3.5%
Fringe Benefits	\$ 10,011,902	\$ 9,256,356	8.2%
Equipment	\$ 3,551,437	\$ 3,230,056	9.9%
Domestic Travel	\$ 2,351,335	\$ 2,122,210	10.8%
Foreign Travel	\$ 746,444	\$ 643,240	16.0%
High Performance Computing	\$ 39,457	\$ 30,425	29.7%
Unallocated	\$ 151,573	\$ 1,582	9478.3%
DIRECT	\$ 125,375,166	\$ 113,866,278	10.1%
IDC	\$ 38,101,145	\$ 34,775,970	9.6%
Total	\$ 163,476,311	\$ 148,642,248	10.0%

Expenditures - Direct		
	YTD (Oct.)	Full Year
FY24	\$ 125,375,166	\$ 345,961,315
FY23	\$ 113,866,278	\$ 337,688,551
FY22	\$ 119,924,365	\$ 330,920,330
FY21	\$ 96,643,049	\$ 294,248,586
FY20	\$ 91,947,517	\$ 286,744,676
Expenditures - Indirect		
	YTD (Oct.)	Full Year
FY24	\$ 38,101,145	\$ 109,610,172
FY23	\$ 34,775,970	\$ 103,856,777
FY22	\$ 32,354,840	\$ 93,079,082
FY21	\$ 28,926,852	\$ 86,156,912
FY20	\$ 29,963,459	\$ 84,764,909

Key Takeaways:

- Direct expenditures were up 10.1% and indirect expenditures were up 9.6% YOY.
- Relative increases in all areas except M&S.

RI Sponsored Programs

Grants and Contracts *INVOICING* and *FINANCIAL REPORTING* FY23 – FY24 (YTD through Period 4: October)

INVOICING			
Invoicing YTD FY2023 vs. FY2024 (thru Oct.)			
Invoice Types	FY24 (Oct. YTD)	Monthly FY24 Average	FY23 (Oct. YTD)
G&C GIT Standard	\$ 10,000	\$ 2,500	\$ 303,576
G&C GIT Standard Certification Required	\$ 8,435,848	\$ 2,108,962	\$ 177,179
G&C GTRC Custom Certification Required	\$ 719,402	\$ 179,850	\$ 1,411,180
G&C GTRC Standard	\$ -	\$ -	\$ 9,780,038
G&C GTRC Standard Certification Required	\$ 47,493,695	\$ 11,873,424	\$ 28,503,597
G&C In House	\$ 7,590,744	\$ 1,897,686	\$ 18,492,446
G&C LOC Draw	\$ 60,830,059	\$ 15,207,515	\$ 59,212,348
G&C SF1034	\$ 7,449,677	\$ 1,862,419	\$ 4,406,097
G&C SF 270	\$ 19,578,669	\$ 4,894,667	\$ 19,247,454
Unspecified	\$ -	\$ -	\$ 307,514
Grand Total	\$ 152,108,093	\$ 38,027,023	\$ 141,841,430
Raw Invoice Counts	5,280	1,320	4,203
Year over Year Invoicing Change	Dollars	Invoice Counts	
YTD change in FY24 over FY23	\$ 10,266,663	1,077	
YTD percentage change	7.2%	25.6%	

FINANCIAL REPORTS		
Financial Reports YTD FY20223 vs. FY2024 (thru Oct.)		
Report Types	FY24 (Oct. YTD)	FY23 (Oct. YTD)
Annual Financial Report	36	48
Final Financial Report	67	64
Monthly Financial Report	52	57
Quarterly Financial Report	265	211
Milestone (Event Based)	1	-
Semi-Annual Financial Report	13	18
TOTALS	434	398
Year over Year Invoicing Change	Report Counts	
YTD change in FY24 over FY23	36	
YTD percentage change	9.0%	

Notes:

- Invoicing and financial report submission trends following trends in spending.

RI Sponsored Programs

Grants and Contracts: FINANCIAL ANALYSIS: FY23 – FY24 (YTD through Period 4: October)

G&C ANALYST TEAM: JOURNALS	FY24	% of Total	FY23	% of Total	% Chg FY
Journals (Total)	428		462		-7%
Appropriate Grants Management	317	74%	377	82%	
"Red Flag" Grants Management	111	26%	85	18%	

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.

Key Takeaways:

- The statistics on journals show a 7% decrease relative to last year, although there is an increase in "red flag" journals as a percentage of the total.
- Independent of journal activity through October, the analyst team managed 461 award initiations, 918 award modifications, 2,074 award corrections, and 151 service now tickets.

RI Sponsored Programs

Award Dollars in Exception Status

AWARD EXCEPTIONS (Overspent) - as of November 1			
Row Labels	Past-term	In-Performance	Grand Total
Financial Aid	(1,479,804)	(23,192,239)	(24,672,043)
Electrical and Computer Engineering	(674,879)	(2,339,740)	(3,014,619)
General Institutional Expense	(467,191)	(282,785)	(749,977)
EI2 Safety, Health, Environmental Services	(369,627)		(369,627)
Mechanical Engineering	(265,400)	(2,921,925)	(3,187,325)
Aerospace Engineering	(261,901)	(998,030)	(1,259,931)
Center for Education Integrating Science, Mathematics & Computing (CEISMC)	(216,538)		(216,538)
Chemistry and Biochemistry	(140,736)	(655,641)	(796,376)
School of Computer Science	(114,006)	(203,349)	(317,354)
School of Interactive Computing	(101,441)	(418,243)	(519,684)
Institute for Bioengineering & Bioscience	(96,506)	(7,910)	(104,415)
Industrial And Systems Engineering	(73,847)	(244,235)	(318,082)
Materials Science and Engineering	(60,603)	(888,627)	(949,230)
GT/Emory Biomedical Engineering	(37,874)	(1,786,931)	(1,824,805)
Chemical and Biomolecular Engineering	(34,956)	(1,120,215)	(1,155,170)
Grand Total	(4,534,345)	(40,860,422)	(45,394,767)
Non-Financial Aid	(3,054,541)	(17,668,183)	(20,722,724)

Key Takeaways:

- This data represents awards where actual spending plus obligations and commitments exceeds the current budget.
- The biggest risk area is dollars associated with “past-term” awards (the end date has passed).
- The three exception reports are for awards, grants, and cost sharing. This information is now being provided in three ways:
 - Each month at the beginning of the month, Grants and Contracts provides them to unit financial managers AND now to department chairs.
 - The reports are available on LITE.
 - [Our Exception Report BOT is now in place, where PIs and grant administrators are automatically emailed twice a month to inform them about the exceptions and for them to review \(and take action if needed\).](#)

PI Articles

[PI ARTICLE: Research Proposal Submissions – Don't Needlessly Miss Your Flight.](#) (September, 2023) [\(PDF Download\)](#)

[PI ARTICLE: A Celebration of Georgia Tech Research.](#) (August, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Audits and Reviews.](#) (July, 2023) [\(PDF Download\)](#)

[PI ARTICLE: A Summer Salary Briefing.](#) (June, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Exception Reports and the Importance of Sponsored Budget Management.](#) (May, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Cost Transfers – Manageable Problems.](#) (April, 2023) [\(PDF Download\)](#)

[PI ARTICLE: The Craft of Carryover.](#) (March, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Participant Support Costs versus Participant Incentives.](#) (February, 2023) [\(PDF Download\)](#)

[PI ARTICLE: The Problems with Overspending on Sponsored Awards.](#) (January, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Popular Research Metrics.](#) (December, 2022) [\(PDF Download\)](#)

[PI ARTICLE: Cost Sharing – Nuts and Bolts.](#) (November, 2022) [\(PDF Download\)](#)

[PI ARTICLE: An Inventory of Sponsor Required Reports.](#) (October, 2022) [\(PDF Download\)](#)

[PI ARTICLE: How do Fringe Benefit Rates work at Georgia Tech?](#) (September, 2022) [\(PDF Download\)](#)

[PI ARTICLE: The Mysterious and Very Important F&A Cost Reimbursement Rate.](#) (August, 2022) [\(PDF Download\)](#)

[PI ARTICLE: Subrecipient Monitoring – Roles and Responsibilities.](#) (July, 2022) [\(PDF Download\)](#)

[PI ARTICLE: OSP and G&C – Who Does What?](#) (June, 2022) [\(PDF Download\)](#)

[PI ARTICLE: How Much Money Do I Have?](#) (May, 2022) [\(PDF Download\)](#)

[PI ARTICLE: Sponsored Award Management – Timeline and Tasks.](#) (Apr, 2022) [\(PDF Download\)](#)

Notes:

- PI Articles that I will be writing and issuing each month for research faculty and unit financial staff are available on our grants and contracts website

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

- The latest articles:

[PI ARTICLE: The PI "Must-Knows" of Post Award Financial Management.](#) (November, 2023) [\(PDF Download\)](#)

[PI ARTICLE: Cost Principles – Research Administration's Big Four.](#) (October, 2023) [\(PDF Download\)](#)

Commitment Accounting Updates

Jason Cole

Interim Director - Commitment Accounting

Keys to Success: Change Position Funding

A Change Position Funding (CPF) transaction is needed to change the distribution of future (unprocessed) payroll expenditures from one funding source to another by effective date and percent.

- The home department that owns the position must initiate the transaction. The transaction will automatically route to Level 1 approvers within the department.
- **Be sure to compile all the necessary information BEFORE trying to submit the transaction. Necessary information includes:**
 - Position Number
 - Combo Codes/Worktags for the new funding distribution
 - Effective Date/s
 - Percent of distribution for each effective date, in case multiple effective dates are applicable
 - Any additional approvers who will need to be inserted in the approval workflow, as applicable
<https://www.budgets.gatech.edu/rCmtAcctg/CAApproverList>
- **The effective date on a CPF transaction must be:**
 - **The beginning of the current or a future pay period (not the employee start date or semester start date).** For monthly positions, this is the first of the month. For bi-weekly positions, please refer to the bi-weekly calendar, and note the bi-weekly pay periods begin on a **Sunday**.
To lookup as to whether a position is monthly or bi-weekly, please use the Empl Position Search tab from Quick Links on the Budget Office website.

EDR Processing

- Any EDRs that are saved but not submitted post GL-processing will be deleted overnight.
- Once an EDR is approved by all level approvers, it is ready to be processed.
- BORDBEUPD (EDR update process) process posts funding changes to the Department Budget Table and Job Data and releases the lock on the record.
- Process runs in batch daily during the following times:
 - 5:00 a.m.
 - 9:00 a.m.
 - 1:00 p.m.
 - 5:00 p.m.

EDR Justifications

New Distribution

A screenshot of a software interface showing a dropdown menu titled "New Distribution". The menu is open, displaying a list of options: Clerical, DistPerct, EndGrant, FYE Adjust, FringeTax, FundingSrc, GrantLate, Other, Overspent, and PositionFu. The top of the menu is highlighted in blue. A small downward arrow is visible at the bottom of the menu.

Option Name	Description
Clerical	Clerical/Accounting Error
DistPerct	Distribution Percent Changes Between Funding Sources
EndGrant	End of Grant Reached
FYE Adjust	Year End Adjustment
Fringe Tax	Grant Doesn't Allow Fringes
FundingSrc	Employee Changes Funding Sources
GrantLate	Grant Funding Late
Other	Other (User enters detailed justification)
Overspent	Grant Overspent
PositionFu	Position Not Funded

Please carefully select the applicable EDR justification option. This is important for auditing purposes.

FundingSrc: EDRs that correct a recent position funding change should have a matching CPF submitted as well.

Other: Requires detail. "To correct an error" or "To transfer to correct project" or "Per PI" are not sufficient and will result in the transaction being denied.

> 90 Day EDR Justification

- **Only applies to EDRs when moving salary on to a grant (e.g. 03GR00000000)**
- **Complete transmittal form with detail explanations**
 - Found on [Budget Office Website](#)
- **Common reasons to exceptions**
 - Initial or continuing sponsor funding delayed beyond 90 days.
 - Specific approval received by sponsored agency
 - Transfers to cost share or between grants within the same award
- Job Aid: [How Do I Submit A Current Fiscal Year Late Express Direct Retro \(over 90 days\) Request?](#)

Project Accounting Updates

Glenn Campopiano

Director, Project Accounting

Project Accounting Updates

Robotic Process Automations (RPA)

- Invoices
- Cost Share Reports
- Sponsor Financial Reports
- Federal SF-425 Financial Reports
- Back up documentation for sponsor

Future RPA process?

- Close out
- Award setup, Mods, NCE

Project Accounting Updates

Exception Reports in Relation to Close Out of Awards

- G&C has greater than 1,000 awards in closeout status that need to be inactivated.
- Roughly 466 Grant lines are in exception status on closed awards that need to be cleared before G&C can inactivate awards to finalize the close out process.
- Possible large one-time journal to move unallowable, past term and overruns to unit overrun worktags to clean up any award 120+ past term.
- Please address exception reports issues timely.

Project Accounting Updates

Other issues delaying closeouts

- As Josh reported “red flag” JE are 25% of all JE coming into G&C, these take up more time and effort from the analyst team.
- Open obligations for both purchases and sub awards –purchase obligations should be closed by the end date of award, sub-awards no later than 60 days after end date or per T&C’s.
- Awards receiving no cost extensions after term date. Best practice is to ask for NCE as soon as possible so that it comes in before original POP ends. This keeps award in active status and not have to deal with it going into closeout status.
- Remember – Manage awards during the POP not after they end.

Project Accounting Updates

Contract Information System (CIS)

- OSP announced CIS will be replaced by E-Routing
- G&C is involved providing input on the requirements it needs from E-routing as it is expanded to serve as the CIS replacement.
- We are hoping for some WD integrations that will eliminate double entry of info into WD – like budgets.

Monthly Office Hours

- Be sure to visit Doug, Mary or Me on the last Monday of month at 10AM for any questions or conversation you may have. (TEAMS)

Compliance Updates

Charles H. Derricotte III

Financial Compliance Program Manager

What have we done? – Sponsor & Other

- Marcus Foundation Sponsor Audit
- Annual Single Audit FY23
- Annual Sandia Cost Claim (Component of future audits)
- Department of Education Monitoring Review
- Bill and Melinda Gates Sponsor Audit (Possible Uptick in Private Sponsored Audits)

What are we doing? – Proactive Reviews

- Cost Transfers Review Quarterly
- Supplemental Pay Review Quarterly
- Participant Support Transactions Review Quarterly
- Semi-Annual Sub-Recipient Review (Risk Based)
- Ledger Analysis as needed (Mod. Risk spend codes on sponsored awards)
- OPEN to INTERNAL REVIEWS on awards where there is RISK

Overview of Sub-Recipient Monitoring: What is a subaward?

- A subaward According to OMB Uniform Requirements (2 CFR 200), a subaward is defined as "an award of financial assistance in the form of money, or property in lieu of money, made under an award by a recipient to an eligible subrecipient or by a subrecipient to a lower tier subrecipient."
- A subrecipient means the legal entity to which a subaward is made and which is accountable to the recipient for the use of the funds provided.
- A subaward may be required if part of the research effort under a sponsored project is to be performed by an outside organization or institution.

Overview of Sub-Recipient Monitoring: What is a subaward?

- Under **a subaward**, a subrecipient generally performs tasks that are considered substantive programmatic work and is responsible for programmatic decision making.

Defining“ substantive programmatic work”

- The collaboration is substantial enough that the collaborating **individual** or **organization** will participate in preparation of results, publications, presentations or other collaborative participation beyond routine analytical work. Note: Includes fellowships and other agreement contracted as a subaward through the office of sponsored programs.

Overview of Sub-Recipient Monitoring: Roles and Responsibilities: Office of Sponsored Programs

- OSP is responsible for the oversight of subrecipient monitoring and ensuring that the Institute's subrecipient monitoring procedures are compliant with federal and other applicable regulations.
- Identifying the federal award information (e.g., Assistance Listing number, award name, name of federal agency) and applicable compliance requirements, including any appropriate flow-down provisions from the prime agreement.
- Annually reviewing all active subawards for which monitoring is mandated

Overview of Sub-Recipient Monitoring: Roles and Responsibilities: Principal Investigators (PI)

- Monitor/Review of subrecipient's technical and programmatic activities related to the subaward.
- Verifying that the subrecipient work is conducted in a timely manner and that the results delivered are in line with the proposed statement of work.
- Reviewing and approving subrecipient invoices, including expenditures to ensure the charges are allowable, allocable, reasonable, and within the period of performance.
- **Maintain regular contact with the subrecipient – Frequency is dependent on program deliverables yet should be at a minimal annually every fiscal year. This component is regularly tested by external auditors.**

Overview of Sub-Recipient Monitoring: Roles and Responsibilities: Financial Departmental Administrators

- Reviewing invoices from subrecipients to ensure invoices are within the parameters of the subaward budget and questioning expenditures if necessary*
- Requesting clarification from the subrecipient regarding any unusual or excessive charges invoiced by the subrecipient*
- Maintaining copies of all invoices that provide evidence of the regular review of invoices by the PI*
 - “Evidence” can be in the form of authorized signature by the PI or his/her designee, PI’s initials, e-mail communications, or notes of meeting between the PI with the department administrator.
- **Maintaining documentation of monitoring efforts (copies of e-mails, phone log, etc.)**

*Tested by Grants & Contracts Compliance Group Semi-Annually

Example 1 – Summarization & Slides

Hello Charles,

The [redacted] team is supervising two students on this project. The team has participated in about six teleconferences, contributed to two reports, and participated in the two-day in-person review meeting. The students also participated in a monthly student-led seminar series, giving one of the seminars in Spring 2023. In

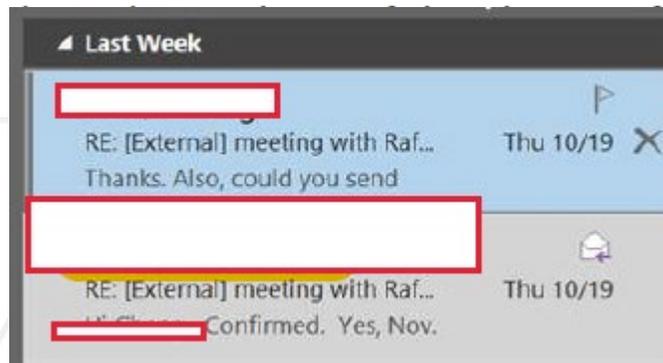
A link to their slides from the review meeting is here: [https://www.dropbox.com/\[redacted\]](https://www.dropbox.com/[redacted])

The annual report is attached.

Example 2 – Summarization & Email Discussions

Hello Charles,

I have pasted 11 screen shots of my email box for this project under Research Discussion, showing the frequent email communications among people who have been working on this project: myself, my admin [redacted], my lab manager [redacted], Research Scientist II [redacted] postdoc [redacted], PhD student [redacted], and the [redacted] Sub PI [redacted] his admin [redacted], and his postdocs [redacted] covering the period from Jan 20 2023 to Oct 19 2023. I have also attached three attachments of some of these emails, including a meeting summary and two data pptx presentations.



Best Practice – Keep confirmations of meeting invite by the Sub-Recipients and respond via email after the meeting has taken place. Response can be a quick summarization of meeting or add other details based of discussions. **Make sure appropriate senior personnel are cc'd on all emails (P.I, Senior Researcher, other).** **Both GIT and Sub-Recipient.**

Example 3 – In Person Meeting Agenda & Attendee Listing

Day 1 -Georgia Tech		
Start time	Duration	What
8:15 AM	30 minutes	Visitors staying in midtown, meet at Georgia Tech Hotel for transportation to GT CoVE
8:45 AM	45 minutes	Arrive at GT CoVE for breakfast and networking
9:30 AM	30 minutes	Welcome, introductions, review of project goals and structure
10:00 AM	10 minutes	Opening remarks from NASA (if any)
10:10 AM	20 minutes	Student training overview
10:30 AM	15 minutes	Break

Attendee List

- PI
- Deputy Project Manager
- Undergraduate
- Research Faculty
- Co-PI
- EARB
- Graduate Student
- Co-PI
- Graduate Student

Example 4 – Weekly Meeting via TEAMS

The screenshot shows a Microsoft Teams meeting invitation for a recurring meeting titled "Weekly Sync". The meeting is scheduled for Monday, August 15, 2022, from 1:00 PM to 2:00 PM Eastern Time (US and Canada). The invitation includes a "Join meeting" button and a list of dates for the next 50 occurrences of the meeting, starting from August 15, 2022, and ending on July 24, 2023. The meeting is organized by a person whose name is redacted with a white box. The right-hand side of the screenshot shows the "Tracking" pane, which is currently empty, with sections for "Organizer" and "Attendees".

Weekly Sync

Mon 5/15/2023 1:00 PM - 2:00 PM View series Show all instances

Join meeting

[Redacted] is inviting you to a scheduled Zoom meeting.

Topic: Weekly Sync

Time: Aug 15, 2022 13:00 Eastern Time (US and Canada)

Every week on Mon, until Jul 24, 2023, 50 occurrence(s)

- Aug 15, 2022 13:00
- Aug 22, 2022 13:00
- Aug 29, 2022 13:00
- Sep 5, 2022 13:00
- Sep 12, 2022 13:00
- Sep 19, 2022 13:00
- Sep 26, 2022 13:00
- Oct 3, 2022 13:00
- Oct 10, 2022 13:00
- Oct 17, 2022 13:00
- Oct 24, 2022 13:00
- Oct 31, 2022 13:00
- Nov 7, 2022 13:00
- Nov 14, 2022 13:00
- Nov 21, 2022 13:00
- Nov 28, 2022 13:00

Tracking

Organizer

Attendees

Best Practice – Create a standing meeting with the sub-recipient to show regular communications through the fiscal year. Keep a meeting agenda and consider a follow-up email to summarize discussions from the meeting. **Make sure all appropriate senior personnel are included on meeting invite and on all monitoring emails (P.I, Senior Researcher, other). Both GIT and Sub-Recipient.**

Example 5 – Phone Calls

- Can be used to show appropriate sub-recipient monitoring if:
 - P.I or responsible party sends an email to sub-recipient detailing the discussions and the sub-recipient confirms discussion details.
 - Discussion **must** involve award deliverables, invoicing, or other key information related to the award/grant.

Sub-Recipient Resources

- <https://osp.gatech.edu/subawards>
 - Overview of the Subaward cycle
 - Meet OSP Subaward team
- <https://osp.gatech.edu/subaward-support-workday/>
 - Training links for Workday
 - Frequently Asked Questions
 - Video Support
- <https://www.grants.gatech.edu/pi-articles>
 - ***PI ARTICLE: Sponsored Award Management – Timeline and Tasks. (April 2022)***
 - ***PI ARTICLE: Subrecipient Monitoring – Roles and Responsibilities. (July 2022)***

Note: P.I Articles are available via pdf download to print personal copy

F&A Reports

Justin Yoo

Cost Accountant II

F&A Reports Video link

https://mediaspace.gatech.edu/media/F%26A+Reports+Demo+-+November+2023+Buzz/1_63mwr47m

Workday Reporting Updates

Amy Zhang

Application Support Analyst Lead

SABER 90 days prompt

- We have added two prompts to Saber reports.
- 90 days and Exclude inactive awards prompts.
- We recommend that when you check the 90-day prompt, please input another parameter, such as cost center or grant manager, so you are able to see all awards that are ending within the next 90 days within the specific cost center or under the responsibility of the designated grant manager.
- These two prompts are available in SABER, SABER by Object Class and Saber-Subaward reports.

SABER - Sponsored Award Budget Expense Report ...

Instructions The following prompts can not be used concurrently: Award PI, Grant PI, Grant Manager, Award G&C Sponsored Accountant, Award G&C Financial Analyst or Grant G&C Financial Analyst

Period * X FY24 - Nov

Award

Grant

Cost Center

Grant Hierarchy

Sponsor

Award PI

Grant PI

Grant Manager

Award G&C Sponsored Accountant

Award G&C Financial Analyst

Grant G&C Financial Analyst

Budgets & Actuals On or After MM/DD/YYYY

Budgets & Actuals On or Before MM/DD/YYYY

Only Include Awards Ending in 90 Days

Exclude Inactive Awards

OK Cancel

Award History tab under Award Overview

- Award history tab is now available under Award Overview.

AWD-000019:

Sponsor Award Reference Number #141956 Sponsor Direct Cost / Sponsor Facilities And Administration 9,938.58 / 0.00 Award Contract Dates 01/01/2019 - 04/30/2019

Sponsor [EMORY UNIVERSITY/ATLANTA, GA](#)

Overview Award Lines Budget Award Tasks Billing & Receivables Additional Data Additional Reports Amendments Set Up & History

Summary Sponsor Funding Details SABER - PEB **Award History - GTCR** Notes

129 items

Timestamp	Task	Version	Updated By	Business Object	What Changed	Changed Field	New Value	Previous Value	Amendment Date	Amendment/Correction Reason	Correction Comment	Amendment Description
11/07/2019 03:59:15 PM	Put Related Worktags for Worktag (Web Service)	1		Grant	GR10029896 PRIME AYSE CAKMAK (BIO-E PILOT PROGRAM)- PROBING THE OVERLAP BETWEEN	Related Worktags	Magnus Egerstedt - me70	CL64000 Sponsored Operations - Private FN12100 Individual or Project Research				

- Special thanks to our OIT-Enterprise App and Data team, especially Chris Cho; without their help, we wouldn't have these cool features.

Training Updates

Rob Roy

Director of BOR Sponsored Programs

2023 Upcoming Fall Semester Classes

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

Offered virtually, via Zoom, unless otherwise noted

November & December 2023

November 28th

Pre-Award Activities

10:00am – 11:30am **(Virtual)**

November 28th

Post-Award Activities

12:30pm – 2:00pm **(Virtual)**

December 4th

eRouting Proposal Module

10:00am – 11:30am **(Virtual)**

December 4th

Cayuse Proposal System Training

2:00pm – 3:30pm **(Virtual)**

SELF-PACED / ON-DEMAND COURSES

- *Introduction to the Research Enterprise at GT*
- *What are GTRC and GTARC?*
- *NIH Proposal Preparation & Review Tips*
- *NIH F Series--Fellowship Programs*
- *NIH Fundamentals (NCURA)*
- *NSF Proposal Preparation & Review Tips*
- *Advanced Research Projects Agency for Health (ARPA-H): Introduction and Q&A*
- *Advanced Research Projects Agency for Health (ARPA-H): Budget Workshop*
- *Advanced Research Projects Agency for Health (ARPA-H): Terms & Conditions Workshop*
- *Service Centers and Best Practices*
- *Specialized Service Agreements*
- *Subawards - Request, Monitor, Risk*
- *Effort Reporting*
- *Cost Share*
- *Cost Transfers*
- *Pivot: Finding Funding*
- **Newly Added:** *Contract Information Systems (CIS)*

RESEARCH ADMINISTRATION BUZZ

RAB MEETING

January 8, 2024

Dalney 180 & Virtual

Lunch: 11:30am - 12:00pm

Event: 12:00pm - 2:00pm

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



GT Certification Contact Hours & CEU credit



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



THANK YOU!



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