Grants Management in ConnectCarolina
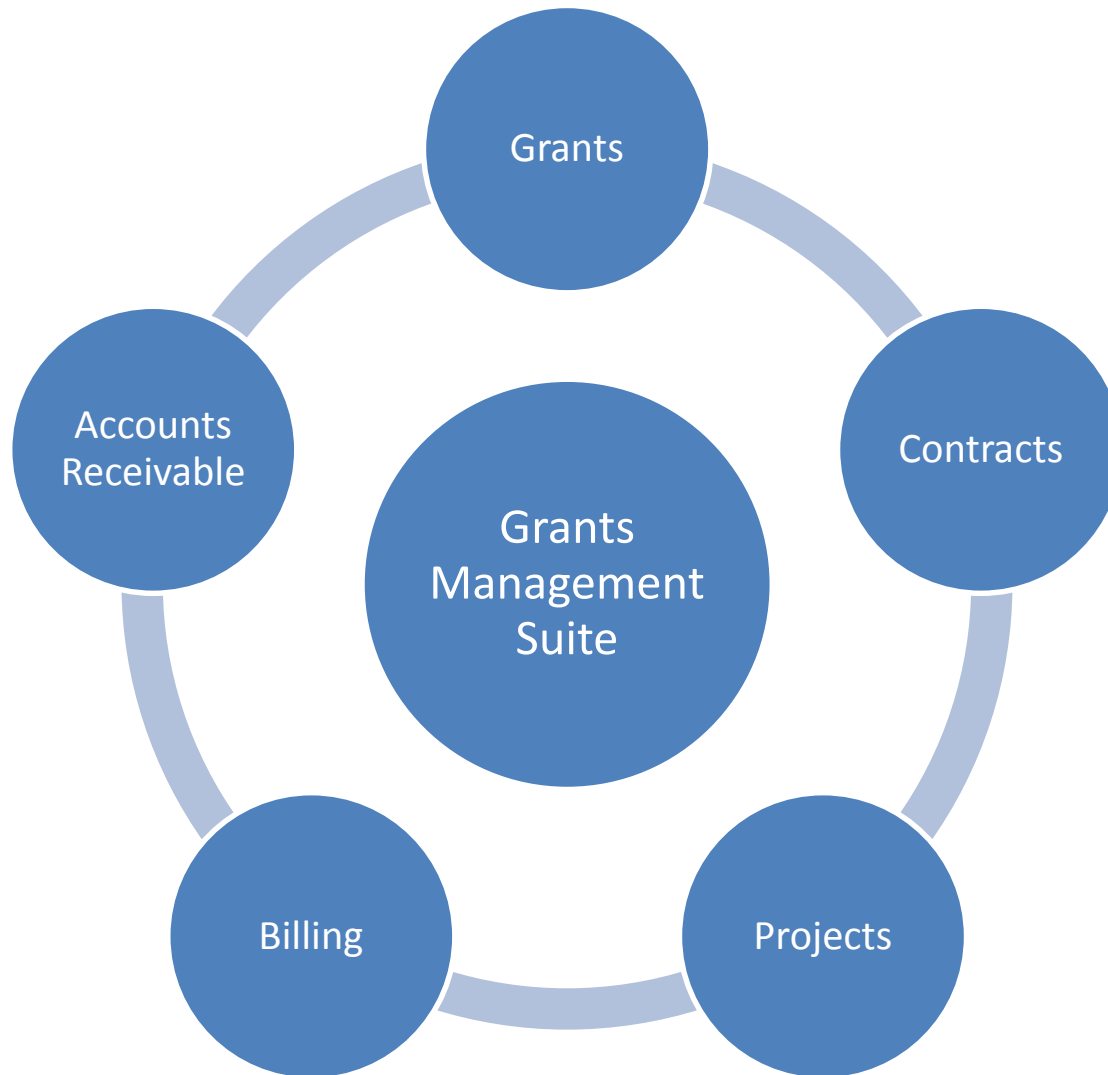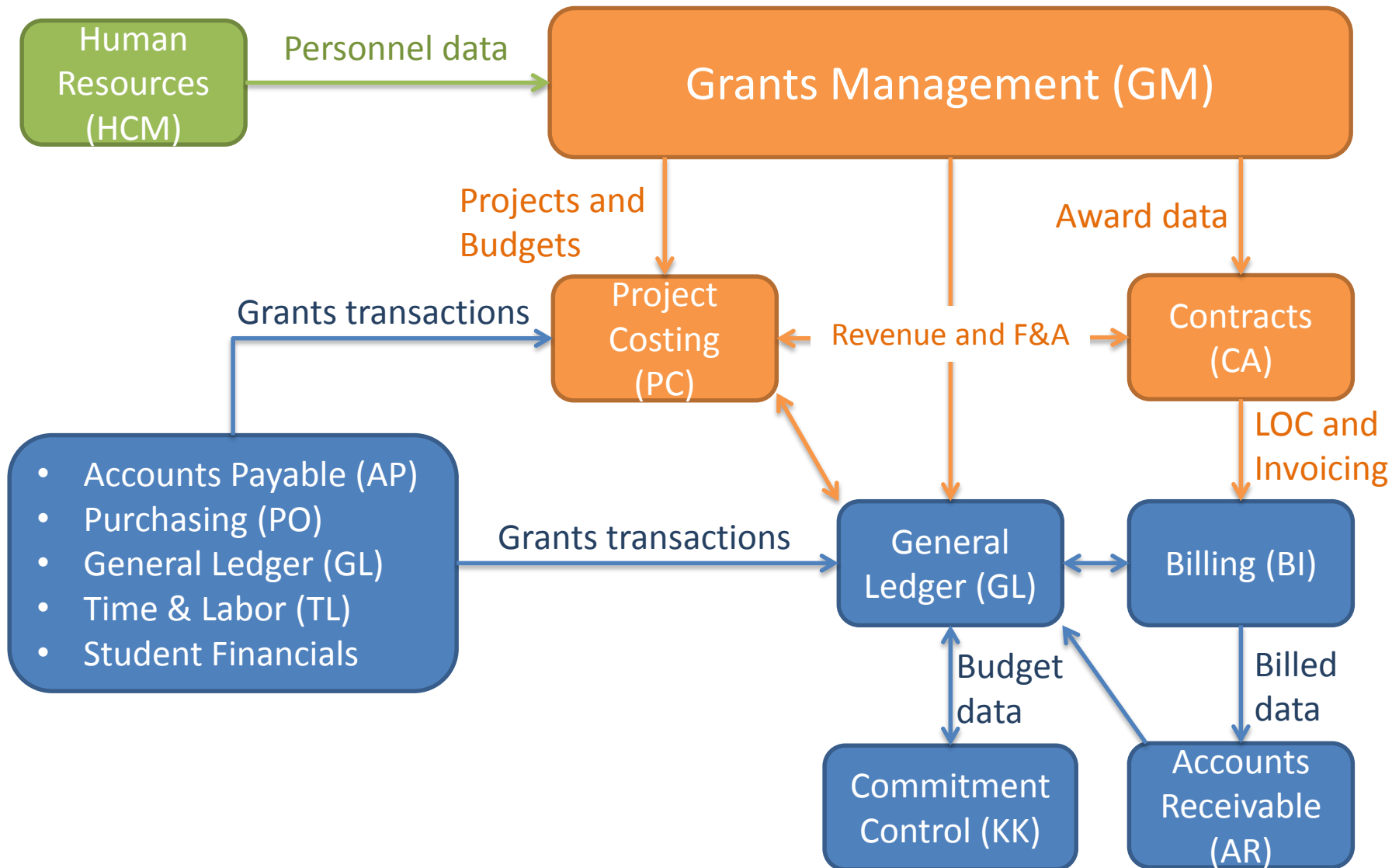
For Research Administrators

August 26, 2014
September 4, 16 & 23, 2014

Connect
CAROLINA

Connect CAROLINA

- Grants
- Contracts
- Projects
- Billing
- Accounts Receivable

Grants Management Suite

- ***Grants (GM):** Manages award (i.e. post-award) data and processes

- **Contracts (CA)**: Serves as a gateway between projects and billing; used to facilitate sponsor billing & revenue recognition; relates many projects to a single award for consolidated billing

- **Projects (PC)**: Serves as a repository for financial transactions associated with projects (sponsored and non-sponsored)

- **Billing (BI):** Generates invoices via data from other ConnectCarolina modules or manual input

- **Accounts Receivable (AR):** Tracks outstanding receivables and facilitates payment application

*Proposal information will be interfaced into GM from RAMSeS

- Information tracked as attributes in FRS will be recorded in fields and tables in the modules listed
- Ability to automate invoicing and letter of credit draw-down processes
- Nightly updates to F&A in the Projects module ensures more accurate reimbursement requests
- Ability to track both personnel and non-personnel cost share transactions
- Better reporting

Project Prefix	Description
4	Clinical Trial
5	Contract or Grant

- One to one mapping to FRS SL account
- Contains existing FRS SL account number
  - *5-30398 (FRS SL) 5030398 (PS Project ID)*

Fund	Fund Code Description	Short Description*
25200	C&G Restricted Funds	4130
25201	C&G Restr - Reg Term Instruction	4130-101
25210	C&G Restr - Organized Research	4130-110
25230	C&G Restr - Student Financial Ad	4130-230
25236	C&G Restr - Educational Agremnts	4130-401
25242	C&G Restr - Community Services	4130-142
25251	C&G Restr – Libraries	4130-151
25260	C&G Restr - Student Services	4130-160
25265	C&G Restr - Student Financial Aid	4130-230
25270	C&G Restr - Institutional Supprt	4130-170

* FRS purpose code

Source	Source Description
49000	Federal Agencies
49100	Education and Research Institutions
49200	Foundations
49300	Business and Industry
49400	State Government (NC)
49500	Nonprofit Organization
49550	Nonprofit Organization – Interest Bearing
49600	Association
49700	Local Government
49800	Other Sponsors/Individuals
49900	Government (non-U.S., non-NC)
49999	Cost Share (budget only)

- PC Business Unit = CHOSR

- Activity ID = 1

- Values remain static

- Speedchart
    - Single value that will default other chartfields
    - Resembles a project ID
    - Used with ePro, vouchers, requisitions
    - Created every time a new project is created

Epidemiology – Disbursement for Scientific Supplies from Sponsored Award for Research

Business Unit	Fund	Source	Account	Dept ID
UNCCH	25210	49000 **Federal**	537110	463500

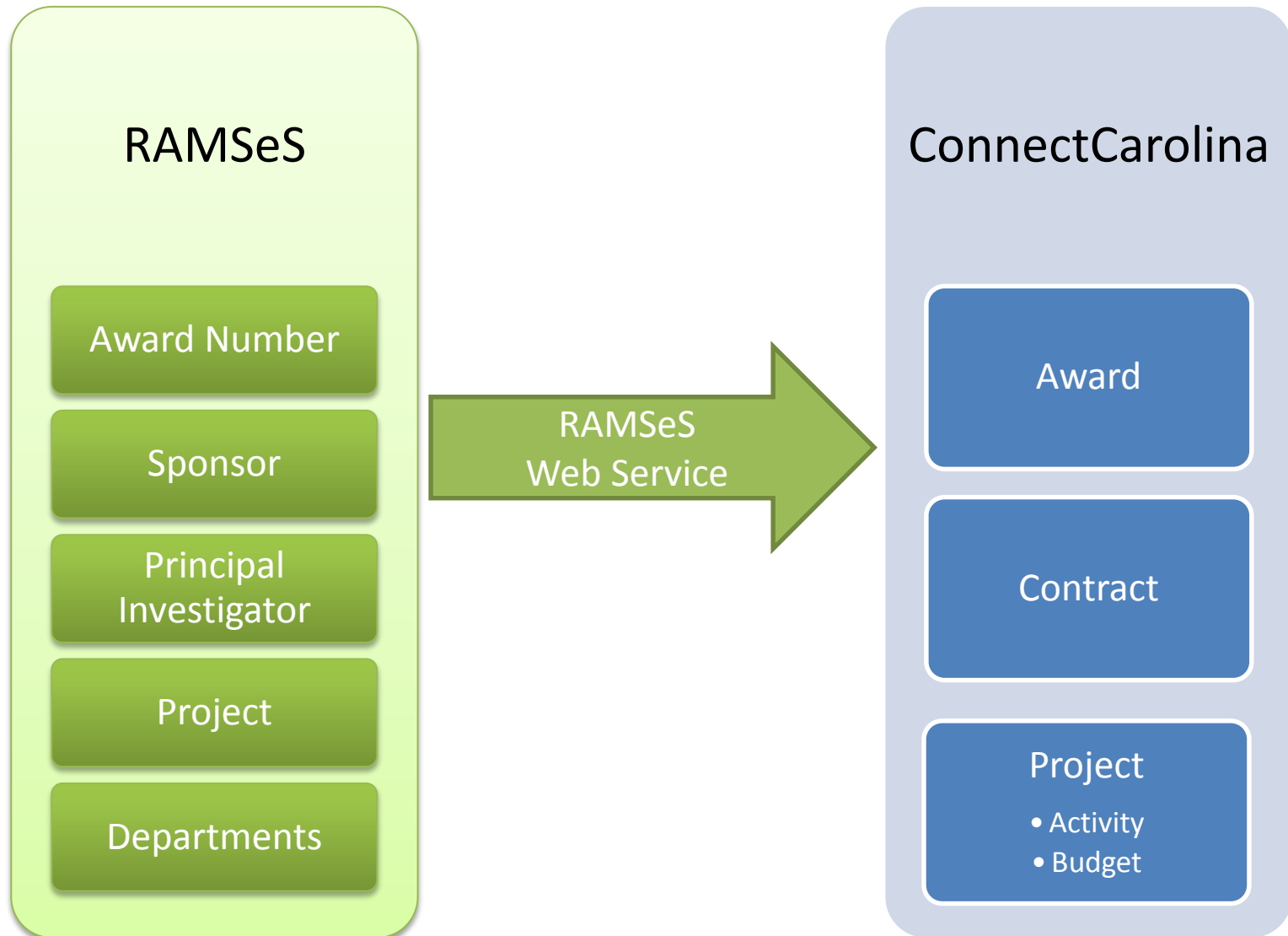| PC Business Unit	Project ID	PC Activity ID
CHOSR **OSR Project Costing BU**	5033746 **FRS 5-33746**	1 **"1" for C&G Project IDs**

Epidemiology – Disbursement for Scientific Supplies from Sponsored Award for Research <u>with cost share</u>

Business Unit	Fund	Source	Account	Dept ID
UNCCH	20101	12001 **Academic Affairs**	537110	463500

PC Business Unit	Project ID	PC Activity ID
CHOSR **OSR Project Costing BU**	5033746 **FRS 5-33746**	1 **"1" for C&G Project IDs**

- Maintaining existing functionality

- Changes to the following:

  - Expanded department structure

  - Change from FRS account to ConnectCarolina project ID

  - Edits to screens that currently display FRS data (HR/Payroll or Financial)

  - RAMSeS to ConnectCarolina interface

- Estimated downtime from September 26th at 5:00 pm to September 29nd at 8:00 am

CAROLINA

RAMSeS

Award Number

Sponsor

Principal Investigator

Project

Departments

RAMSeS
Web Service

ConnectCarolina

Award

Contract

Project
- Activity
- Budget

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Old Term in RAMSeS or FRS	New Term in ConnectCarolina
Account: 5-30968	Project ID Converted: 5030968 Project ID After go live: 51xxxxx
Award number in RAMSeS: A14-1126-001	Award ID & Contract number: A14-1126-001

| Award | Funding | Resources | Certifications | Terms | Milestones | Key Words | Funding Inquiry |

Award ID: A14-0064-001

Reference Award Number: 1-R01-AI108366-01

Title: Unintended and Intended Implications of HIV Cure: A Soci

Long Description: Unintended and Intended Implications of HIV Cure: A Social and Ethical Analysis

*Contact PI: Tucker,Joseph David   Reporting Role

Sponsor: NIH National Institute of Allergy and In

Post Award Administrator: Hess,Frances B

Purpose: OR

Status: Accepted

Award Type: Grant

Proposal ID: A14-0064-001

Version ID: V101

Start Date: 06/15/2013

End Date: 05/31/2015

View Contract   View Proposal   Additional Information   Grant Administrator   Sponsor Website   CFDA

Associated Project		Personalize | Find | 🗗 First ◀ 1-3 of 3 ▶ Last
PC Business Unit	**Project**	**Description**
CHOSR	5033494	Unintended and Intended Implic
CHOSR	5033495	SUBCON:STELLENBOSCH
CHOSR	5034469	SUBCON:GUANGZHOU 8

Go To: Sponsor   Protocols   Attributes   Department Credit   Notepad   Award Modifications

- All C&G budgets will be maintained in the Projects module of ConnectCarolina

- Limited access to budget entry pages for grants
  - Online budget revisions not available for campus
  - New budgets and budget revisions will be keyed by OSR

- Grants budget definition
  - Parent (source & project id)
    - Control
    - Prevents overspending total project budget
  - Child (fund, project id, source, department & account)
    - Track with budget vs Track without budget

- Budgeting options will closely mirror ABR methods available in FRS (detailed vs summary)

- [Project Budget Overview demo](#)

- OSR will continue to pre-audit

- Examples include

  - HR actions that include grant funding

  - Salary source changes

  - Vouchers (specific accounts and $ threshold)

  - Purchase requisitions

  - Journal entries (specific accounts and $ threshold)

  - Correcting journal entries (>90 days)

  - Travel (foreign)

- Processed via voucher

- Change in account usage for processing payments to accommodate appropriate F&A calculation

- Invoices for the first $25,000 of a subcontract
  - Charged to account 569461 (obj 6981) and is subject to F&A

- Invoices for the remainder of a subcontract
  - Charged to account 569486 (obj 6997) and is not subject to F&A

- Requested via current financial guarantee form (RAMSeS)
- If approved, Project ID will be created with zero dollar budget
- Budget will be set to track w/o budget
- Award, contract, and budget will be established once agreement is executed to allow for invoicing

- Automatic billing in batch process
- All transactions must be entered in a timely fashion to the sponsored project, as invoices are created from posted expenses
- Payments will be directed to Bank of America Lockbox

  University of North Carolina at Chapel Hill

  Office of Sponsored Research

  C/O Bank of America Lockbox Services

  P.O. Box 402420

  Atlanta, GA 30384-2420

- Payments received on campus should be sent to OSR for deposit

- Project ID
  - Converted 40XXXXX
  - After go live 41XXXXX
- Budget created based on cash received
- Track w/o budget
- F&A will be recorded based on expenditures
- Departments will invoice (if applicable)

- Continued use for effort reporting

- SPA effort reporting cycle covering July 2014 – September 2014 will reflect FRS data

- EPA effort reporting cycle covering July 2014 – September 2014 will reflect FRS data

- Effort reporting cycles beginning October 2014 will reflect ConnectCarolina data

- Upgraded version of **ecrt** will be rolled out after go-live to accommodate the new chartfield structure; additional effort reporting training will also be provided

- OSR actively involved in mapping the following:
  - Chartfields (project ID, fund, and source)
  - Award data
  - Billing history
  - Open AR items
  - Budgets
  - Additional transactional data

- The University will use InfoPorte as its chief reporting tool

- InfoPorte reports on data exported from PeopleSoft on a nightly basis into a new data warehouse

- InfoPorte is a parameter driven system that allows users to select various parameters to achieve the output they are looking for

  – Data/screens can be output to Excel; many data/screens can be output to PDF

  – A number of existing financial reports are being converted like the FMB090 and 095

- Fifteen months of payroll history data to support retroactive actions back to July 2013 will be converted into PeopleSoft and loaded into the data warehouse

- Grant data can be accessed via InfoPorte/legacy warehouse for historical data (prior to 10/1/2014) and through InfoPorte for transactions that occur after 10/1/2014

- Training for InfoPorte and ConnectCarolina will be through computer-based training (CBT) modules and large venue demonstrations
- Live demo dates
  - Sept 17, 25, 26
  - Oct 9
- More info at http://ccinfo.unc.edu/training/live-demos/
- Access CBTs here: https://its.cloudapps.unc.edu/cccbt/

- RAMSeS will be available to initiate and route proposals (except between 5 pm, September 26 and 8 am, September 29)

- For grants ending September 30, 2014, plan to ensure all procurement requests on grants and contracts are processed, approved and completed by September 15

- Plan ahead for

  – Capital equipment purchases

  – Cash advance requests

  – Subcontract expenditures (especially foreign subcontracts or small community-based partners)

  – Travel or start-up costs

  – Providing non-service, tuition, or fee awards to student

- Researchers and the Office of Sponsored Research will be able to:
  - Respond to just in time (JIT) requests,
  - User ecrt to review and approve effort reports that do not require payroll adjustments
  - Negotiate agreements and subawards
- Hiring and employment status changes
  - All hiring and status changes effective in September 2014 must be entered and approved in legacy systems prior to September 15
  - Ensure any needed salary source changes, especially those with dates prior to July 1, 2013, are processed in legacy systems before September 15

Connect CAROLINA

| Finance | Payroll | HR | Procurement | OSR | Facilities / Services | Reporting |

Sun 8/31	Mon 9/15	Tue 9/16	Wed 9/17	Thu 9/18	Fri 9/19
By 5pm: Freeze all chartfields except Project	**7pm:** last time for many legacy finance transactions. Includes: Web Reqs, Check Requests, SOP, CABs documents, Web Travel, Web Vendor	**5pm:** Deadline for adding projects to FRS via RAMSeS	**7am:** Vendors complete loading into PeopleSoft	**8am:** Start of all HR/Payroll Conversions	**5pm:** Last time to request FAC, AUX services using old chartfields
Mon 9/1		**9pm:** Finance starts converting data to PeopleSoft	**5pm:** All HR transactions stop in HRIS & EPAWeb		**5pm:** Last day to make Accounting Info changes in Pcard
8am: Cleanup of Vendor Data in FRS completed					**5pm:** InfoPorte outage begins
		After 5pm: Last Bi-Weekly Legacy payroll processed			**7pm:** Last Monthly Legacy payroll processed
					8pm: Awards / Projects loaded

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Connect CAROLINA

Cutover Dates

Finance	Payroll	Procurement	OSR	Facilities/Services	Campus Solutions	Reporting

Sat 9/20	Mon 9/22	Tues 9/23	Wed 9/24	9/25	Fri 9/26
10am: Begin loading actuals and budgets into PeopleSoft	**8am:** InfoPorte outage ends	**5pm:** HR/Payroll conversion is completed	**8am:** Payroll and Benefits live in PeopleSoft		**4:30pm:** Last day to submit Departmental Deposits
	5pm: Final Pcard Journal to FRS				**5pm:** CS Outage begins
	5pm: Last time SPMS can be used for Surplus Requests		Finance and HR loaded into InfoPorte		**5pm:** Last UAS journal to FRS
Sun 9/21					**5pm:** Last Voucher uploads to FRS
	5:30pm: Final SPMS Journal to FRS				**5pm:** Last day for Central Office procurement processing
					5pm: Outage for ePro Vendor Catalogue begins

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Connect CAROLINA

| Finance | Payroll | Campus Solutions | ALL |

Sun 9/28	Tues 9/30	Wed 10/1	10/2	Fri 10/3	Mon 10/6
8pm: Campus Solutions outage ends	**12pm:** Last Journal Entry Uploads to FRS and Campus Online Journal Entries	PEOPLESOFT FINANCE AND HR/PAYROLL AND INFOPORTE LIVE TO ALL USERS		Bi-weekly employees get paid from PeopleSoft	Sept 2014 closed in FRS

Mon 9/29					Tues 10/7
12pm: Campus Solutions and Loan transactions stop feeding FRS	**5:30pm:** Last send of payments from FRS to vendors **1st bi-weekly payroll processed in PeopleSoft**				Conversion of Sept. 2014 Budgets / Actuals data begins

- The last purchase requisitions, small orders, and travel reimbursement requests must be submitted and approved by September 15.

- The old version of ePRO shuts down at 5 pm on Friday, September 26. The new ePRO not open until Wednesday, October 1.

9/26	9/27	9/28	9/29	9/30	10/1
5pm - ePro closes	ePro Vendor Catalog unavailable				The new ePro opens!
FRIDAY	SATURDAY	SUNDAY	MONDAY	TUESDAY	WEDNESDAY

- If your lab makes daily or frequent purchases of supplies, you must secure an alternative purchasing method for the brief time ePro Vendor Catalog is unavailable. **Plan ahead. Work with your business office** to understand how you will purchase supplies during the outage. **Deliveries can occur during the purchasing outage.**

- A webinar called **Introduction to the New Version of ePro** explains how ordering from catalog vendors like Staples and Fisher Scientific is changing as a result of moving to a new version of ePro

- The webinar will be offered on:
  - Oct. 2

- More info at http://ccinfo.unc.edu/training/webinars/

- User information
  - CCinfo.unc.edu

- Help desk
  - Help.unc.edu
  - 919-962-HELP

- Contact Vanessa Peoples at
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