

Banner Finance & HR Newsletter

March 2004, Issue No. 5

Sponsored Projects - Fiscal Management

Office of Sponsored Programs (OSP)

The Office of Sponsored Programs serves the Mason community through its support in the administration of research grants, contracts, and other sponsored projects. OSP provides assistance to PIs in the following areas:

- Analyzing initial RFP/compliance;
- Routing and submitting technical and cost proposals;
- Reviewing and negotiating project contract terms and executing all awards and contracts;
- Creating the fund and index numbers for the project in Banner;
- Setting up the budget and billing for the project in Banner;
- Billing the sponsor and updating in Banner modifications to budget and/or period of performance;
- Providing fiscal reports on the project to the sponsor; and
- Closing out the project with the sponsor and closing the project in Banner.

OSP is located in the Patriot Square townhouses at 10517-C Braddock Road. For information on OSP, externally funded research, and proposal submission procedures, please refer to the OSP website at:

<http://www.gmu.edu/pubs/osp/>

Internet Native Banner (INB) for MAC Users

MAC users now have the ability to access Internet Native Banner (INB). MAC users who access only e-Print and Self Serve are not affected by this upgrade.

ITU has designed a special Mason Administrative Systems page just for our MAC users.

The url for MAC users who process Electronic Approvals is:

<http://patriotweb.gmu.edu/mac>

Please Note: MAC users must use Internet Explorer 5.1 or 5.2 when accessing any links on the url above.

OSP Organizational Structure

OSP staff is divided into fiscal, compliance, reporting, and contracts areas as well as teams assigned to campus units. The central staff handles the financial, contractual, and university related issues and tasks. The unit teams (broken out by colors) handle the actual proposal submission and sponsored project administration activities.

Refer to the list below to determine which team would assist your department with sponsored research activities. For an up-to-date list, please refer to the OSP website at:

<http://www.gmu.edu/pubs/osp/staff2.html>

OSP Team Leaders and Department Accounts

Blue Team Leader: Sharon DeMarse 993-2297

- Center for Biodefense
- Krasnow
- IT&E

Green Team Leader: Daris Berg 993-2977

- Administration
- Executive
- GSE
- SOM
- SPP

Purple Team Leader: Glenn Morrill 993-4215

- CVPA
- ICAR
- SOL
- Nursing

Red Team Leader: Terri Mancini 993-2258

- Academic Affairs
- CAS

Yellow Team Leader: Garth Gregor 993-3756

- Info Tech
- SCS
- Univ Life

Electronic Hiring Process for Graduate Students and Wage Employees

The hiring process for graduate students and wage employees on sponsored projects is now automated using the Electronic Approvals (EA) process in Banner. This electronic process eliminates the need to send physical paperwork from the departments to OSP and from OSP to HR.

Once the hiring transaction is submitted and then approved at the department level, Banner routes the EA automatically to OSP. Each OSP team checks its workbox at least once a day. If all the necessary information is included in the Electronic Approval, it will be approved immediately. Please note that OSP needs the index number and total anticipated labor cost included in the Transaction Comments of the EA in order to approve the transaction.

The automated hiring process provides the following advantages over a traditional workflow model:

- Decreased wait time between departments for approval (no longer waiting on interoffice mail);
- Decreased number of information tracking mechanisms (no longer need individual logs);
- Immediate status updates from Banner;
- No paperwork to get lost and/or track down; and
- Improved overall turnaround time on hiring.

For more information on the EA process, please go to: <http://hr.gmu.edu/approvals/>

Banner Finance & HR Training

For details and up-to-date information on training times, locations, and registration, please go to:

<http://www.gmu.edu/PatriotProject/train.html>

Sponsored Project Financial Management

Once a sponsored project has been awarded, OSP will notify the PI of the project award.

The PI must now manage the finances of the project. Financial management of sponsored projects cannot be neglected. The project is awarded an amount that must be expended over a specific term and cannot be exceeded. Should overruns occur on a project, PIs and their department chairs must determine how they will cover any over expenditures.

To properly manage a project and minimize the risk of exceeding the project award amount while spending out within the award period, PIs should do the following:

- Review all expenses and labor charged to the project each month for accuracy and to determine how much of the award amount has been spent;
- Reevaluate the time period for spending against the project each month by reviewing the work completed and the remaining balance on the project;
- Provide personnel working on the project with the revised work plan and spending limits for the subsequent months; and
- Repeat the above process to monitor the expenses. Once 75% of the budget has been spent, determine a ramp down schedule, and possibly contact the sponsor for additional funding.

Use the new e~Print Research Repository to access the reports that are important to sponsored research. Please refer to the following e~Print reports to review expenses and labor charged monthly:

- Grant Inception (frigitd)
- Labor Distribution (fzrlabr)

You may access e~Print reports at:

<http://patriotweb.gmu.edu/>