

Banner Finance & HR Newsletter

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Sponsored Project Management & Banner

Sponsored projects have unique administrative requirements and Banner is an integral part of sponsored project management. A sponsored project begins with a proposal submission and ends with closeout. Since Principal Investigators (PIs) must initiate and complete a number of project management procedures, it is essential that PIs know the required administrative process. The Office of Sponsored Programs (OSP) and other university offices are available to answer specific questions. The table below is designed to give PIs a brief overview of the steps in these processes and the essential reference information.

Sponsored Project Management Overview		
Process	Process Notes	Contact Information
Proposal Submission	<p>The PI must call OSP (Karen Cohn at 993-4104) to have a grants administrator assigned to the proposed project. The assigned grants administrator will work with the PI to prepare a budget, complete most application forms, and submit the proposal. In preparation for working with OSP, the PI should complete the preliminary budget worksheet used for drafting a budget (see contact information).</p> <p>The PI is responsible for completing the technical portion of the proposal. All proposals must be reviewed and approved by university officials prior to submission to the sponsor – OSP will route the proposal to the appropriate individuals.</p>	<p>Office of Sponsored Programs MSN 4C6 10517-C Braddock Road Phone: 703-993-2988 Fax: 703-993-2296</p> <p>http://www.gmu.edu/pubs/osp/procedure.htm</p>
Project Set-up	<p>After the award is fully negotiated and executed, OSP will send an award letter to the PI. OSP will also send a signature card and a notification letter with project numbers and other award information. OSP assigns the project grant, fund, and index numbers, posts the budget, and defines the billing process in Banner.</p>	
Project Expenses	<p>Once the project is set up in Banner, the PI should complete the signature card and forward it to the Purchasing & Accounts Payable Office. Once Purchasing & AP receive the signature card, direct expenses may be charged to the project.</p> <p>All expenses must include the index number for appropriate processing.</p> <p><u>Travel:</u> the PI or his/her administrative staff submits the Travel Authorization form to their supervisor or department chair. OSP must review and approve both Travel Authorization and Travel Reimbursement forms.</p> <p><u>Equipment/Supplies/Contract Services</u></p> <p><u>Less than \$2,000:</u> the PI or his/her administrative staff should use the Limited Purchase Order (LPO) form, Check Request form, or American Express card. OSP approval is not required.</p> <p><u>\$2,000 and above:</u> the PI or his/her administrative staff should use the Requisition form and send it to OSP for approval before sending it to Purchasing (see contact information).</p> <p>OSP will bill the sponsor for the charges on the project and either the Cash Office or General Accounting will apply the payments made by the sponsor to the project.</p>	<p>Purchasing MSN 3C5 4087 University Drive Suite 400 Phone: 703-993-2580 Fax: 703-993-2589</p> <p>http://fiscal.gmu.edu/forms/</p>
Project Hiring	<p>The hiring process on a sponsored project varies with the type of personnel. Check with HR for specific information about the required procedures.</p> <p><u>Current 9 month or 12 month GMU Faculty:</u> the PI or his/her administrative staff should complete the <i>Departmental Funding Change Form</i> to change the funding source.</p> <p><u>New 9 month or 12 month Faculty:</u></p> <ol style="list-style-type: none"> 1. The PI or his/her administrative staff should complete the Position Maintenance form and send to OSP for approval. 	<p>Human Resources & Payroll MSN3C3 4087 University Drive Suite 300 Phone: 703-993-2600 Fax: 703-993-2601</p> <p>http://hr.gmu.edu/</p>

<p>Project Hiring (continued)</p>	<p>2. The PI or his/her administrative staff should work with Equity/HR to advertise the position.</p> <p>3. The PI should work with his/her administrative staff to process resumes, create interview questions, conduct interviews, and complete other University procedures.</p> <p><u>Graduate & Undergraduate Students, & Other Hourly Staff:</u> the PI should work with his/her administrative staff to use the Electronic Approvals Process in Banner.</p> <p><u>Summer Employment:</u> the PI should work with his/her administrative staff to use the Electronic Approvals Process in Banner for all summer research faculty, graduate and undergraduate students, and other hourly staff.</p>	<p>University Equity Office: http://www.gmu.edu/equity/</p> <p>Departmental Funding Change Form: http://hr.gmu.edu/forms/</p>
<p>Project Timesheets & Payroll</p>	<p><u>12 Month Faculty & Exempt Employees:</u> report only leave taken by logging into Patriot Web. Select Employee Services, then Timesheet (see contact information).</p> <p><u>Non-Exempt & Wages Employees:</u> report all hours worked by logging into Patriot Web. Select Employee Services, then Timesheet (see contact information).</p> <p>In order for non-exempt and wages employees working on a project to get paid, they must submit their timesheet according to the payroll schedule.</p> <p>The timesheet submission date varies depending on bi-weekly vs. semi-monthly pay. The timesheet approver is responsible for approving the timesheets according to the payroll schedule (see contact information).</p>	<p>Human Resources: http://hr.gmu.edu/</p> <p>Patriot Web: https://patriotweb.gmu.edu/</p> <p>Calendar of Timesheet Submission & Approval Dates: http://hr.gmu.edu/payroll/</p>
<p>Invoices from Vendors & Subcontractors</p>	<p>Vendors and subcontractors will submit invoices against LPOs and Purchase Orders to Accounts Payable. Accounts Payable will require PI approval before processing payments against your project.</p> <p>The state requires that invoices be paid 30 days after receipt of goods/services or invoice, whichever is later.</p> <p>Final payments should be noted on the invoice approval form so all remaining encumbrances are liquidated.</p>	<p>Accounts Payable MSN 3C5 4087 University Drive Suite 400 Phone: 703-993-2580 Fax: 703-993-2589</p> <p>http://fiscal.gmu.edu/departments/purchasing/contacts.html#AccountsPayable</p>
<p>Project Financial Review</p>	<p>The PI or his/her administrative staff should review projects monthly to verify that expenses charged to the project are legitimate. OSP bills the sponsor for the charges processed on the project fund number each month.</p> <p>It is vital that the PI routinely confirm the accuracy of these charges and ensures the management plan for the project takes into account spending the available balance on the project during the course of providing the deliverables and prior to the project end date.</p> <p>The simplest way to do this is to review the e-Print <i>Grant Inception Report</i> and <i>Labor Distribution Report</i> each month. You may also review real-time project finances using Banner Finance Self Service. Refer to the Sponsored Projects – Banner Quick Reference for help with using e-Print and Finance Self Service (see contact information).</p>	<p>Fiscal Services MSN 4B2 4087 University Drive Suite 200 Phone: 703-993-2660 Fax: 703-993-2920</p> <p>e-Print Reports & Finance Self Service: https://patriotweb.gmu.edu/</p> <p>Sponsored Projects – Banner Quick Reference: http://www.gmu.edu/pubs/osp/procedure.htm</p>
<p>Project Work & Deliverable Requirements</p>	<p>The PI is responsible for submitting to the sponsor all work, project/technical reports, and/or deliverables designated in the sponsored project agreement terms.</p>	
<p>Project Reporting Requirements</p>	<p>OSP will submit all financial, patent, and property reports as required by each sponsor. The PI is responsible for submitting technical and other reports requested.</p>	
<p>Project Closeout</p>	<p>Once the period of performance of a project ends, the project is over. The PI and department administrators have three months after the end date of the project to submit expenses for effort or purchases made during the period of performance and make any financial adjustments. OSP will close the project once all payments have been received and reports have been submitted.</p>	