PeopleSoft Grants

3/3/2017

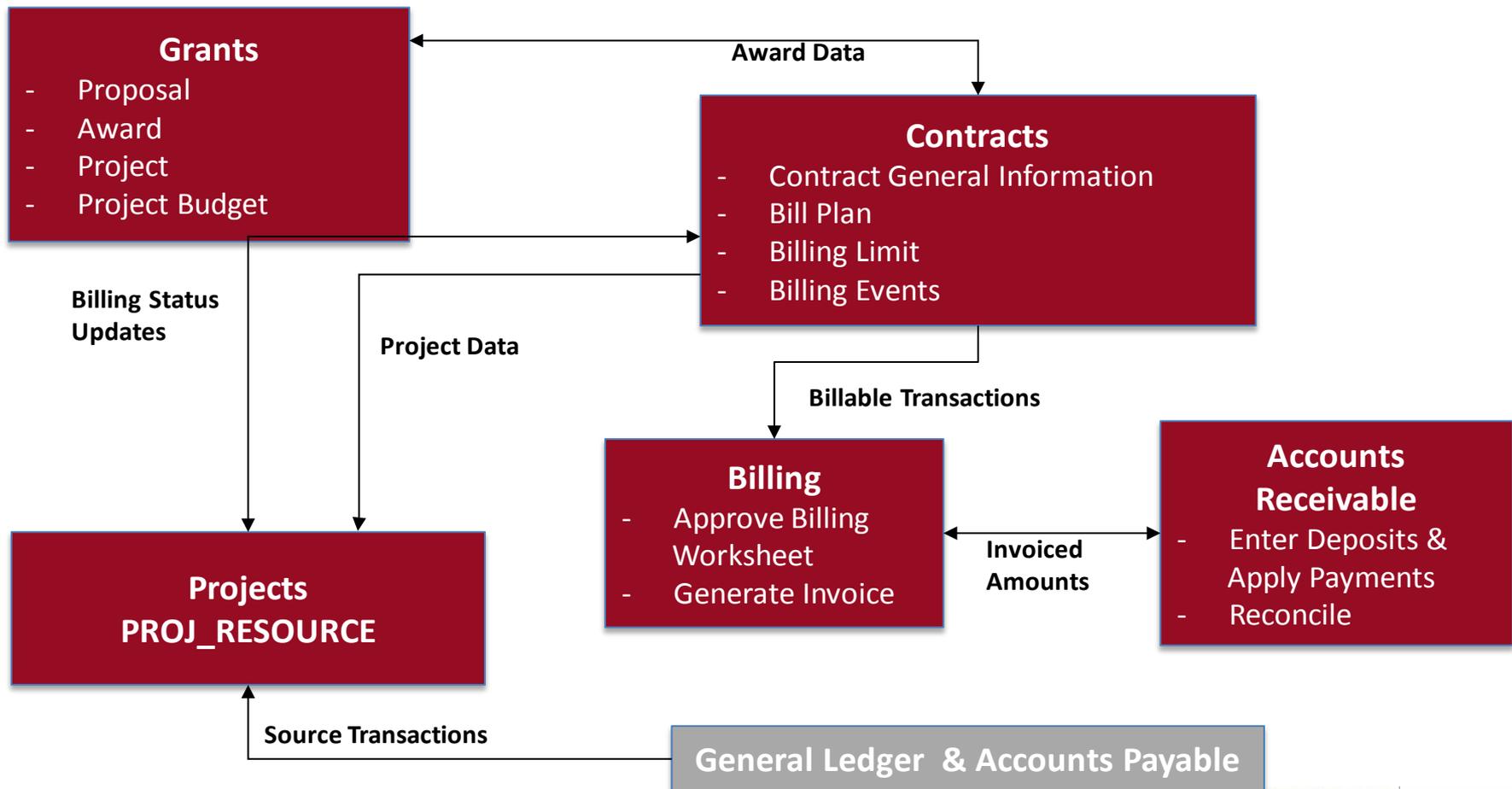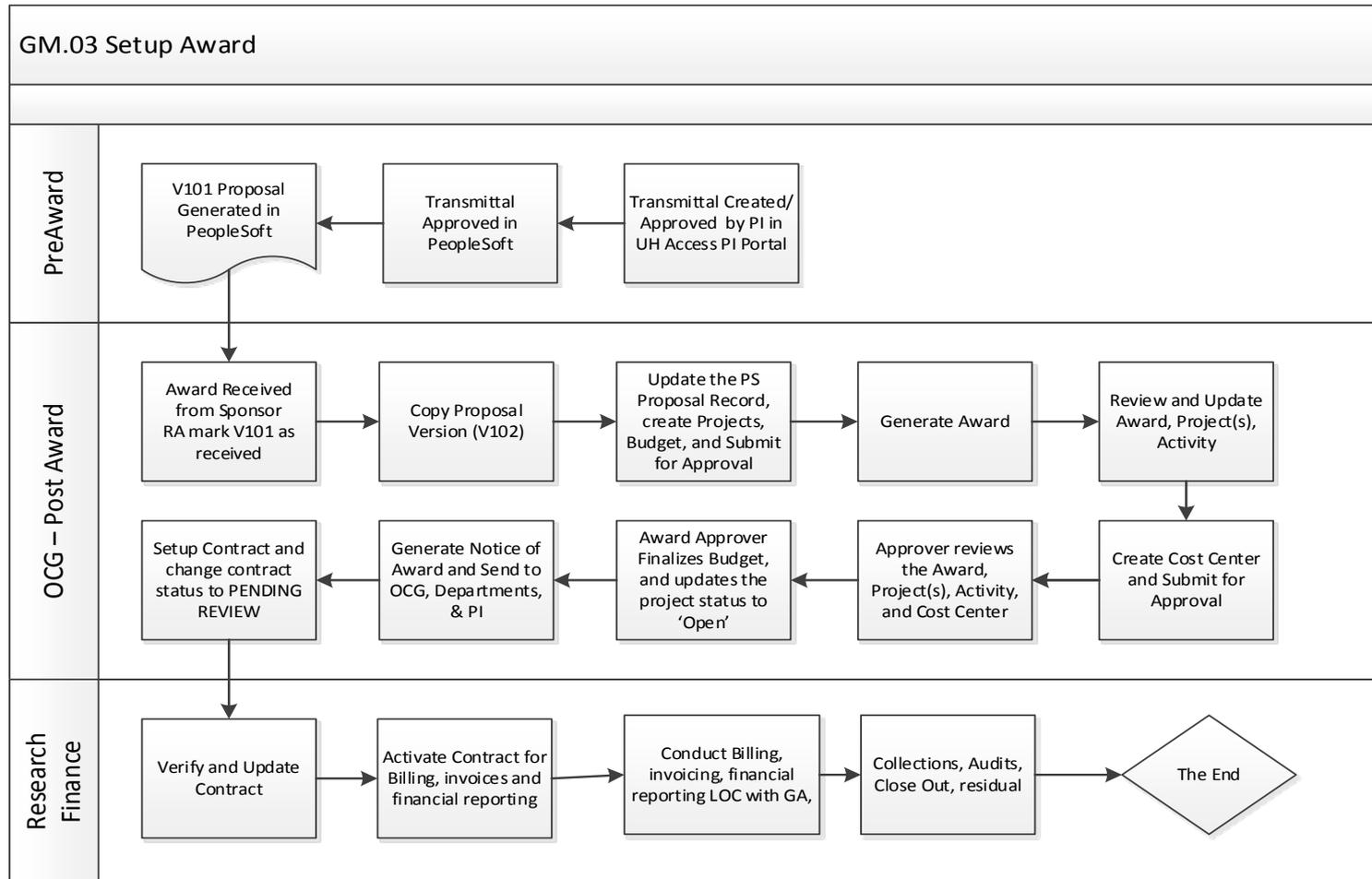|	
3/1/2017	Phase 1 cutover initiated.
3/6/2017	OCG stops creating sponsored project cost centers and/or modifications in PS finance
3/13/2017	UH IT will setup award profiles in PS Grants for project cost centers in RD2K as of 3/6/2017 and will move proposals approved in RD2K as of 3/13/2017 into PS Grants production.
3/13/2017	OCG Research Administrators (RA) will begin to setup awards and process modifications to awards in PS Grants.
3/13/2017	Department users will have view access to PS grants award management proposal, award and project information.

Grants Suite Modules Overview

High Level Overview

High Level Business Process

GM.03 Setup Award

PreAward

V101 Proposal Generated in PeopleSoft ← Transmittal Approved in PeopleSoft ← Transmittal Created/ Approved by PI in UH Access PI Portal

OCG – Post Award

Award Received from Sponsor RA mark V101 as received → Copy Proposal Version (V102) → Update the PS Proposal Record, create Projects, Budget, and Submit for Approval → Generate Award → Review and Update Award, Project(s), Activity

Setup Contract and change contract status to PENDING REVIEW ← Generate Notice of Award and Send to OCG, Departments, & PI ← Award Approver Finalizes Budget, and updates the project status to 'Open' ← Approver reviews the Award, Project(s), Activity, and Cost Center ← Create Cost Center and Submit for Approval

Research Finance

Verify and Update Contract → Activate Contract for Billing, invoices and financial reporting → Conduct Billing, invoicing, financial reporting LOC with GA, → Collections, Audits, Close Out, residual → The End

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The Process

Initiate Proposal from Transmittal

Establish Award Budget

Generate an Award

Setup Award and Project(s)

Create Cost Center(s)

Proposal Profile View

Information on the proposal profile comes from the associated transmittal.

Converted proposals with existing awards will have a *proposal status of "Awarded"* and will have a proposal version as *Version ID "V101"*.

Converted proposals with no award yet issued will have a proposal status of *"Pending"* and will have a proposal version as *Version ID "V101"*.

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Proposal and Award Structure

Proposal: Information about the UH researcher's proposal that was submitted to a sponsor for funding.

Award: Demographic and administrative information received from the sponsor, forms the basis of billing, revenue recognition and stores award attributes.
Each Award must have at least one associated Project.

Proposal
Award
100006

Project:
Information on the Award's funding.
An Award may house multiple Projects.

Project
G100006

Project
G100007

Proposal and Award Setup

One to many relationship

In PS Grants, there will be one proposal related to one award that can be related to multiple projects.

Why would a proposal and the related award have more than one project cost center?

- Different F&A Rates on an Award
- Different PI's
- Different Departments
- Different tasks to account separately for
- Separate reporting periods that require funds to be budgeted and reported separately
- Restricted Carry Forward from one year to another

Proposal Profile View

Proposal	The Proposal tab provides information about the proposal including: title, primary PI, sponsor, assigned research administrators, and proposal status
Projects	The Projects tab provides information that is unique and specific to each project (cost center) including: project title and primary department
Budgets	The Budgets tab provides allows the OCG post award RA to enter detailed budgets. UH is working on a print version for department view.
Resources	The Resources tab provides information about sub recipients and co-investigators (if any). Additional team members involved on the award can be listed under Professional.
Certifications	The Certification tab allows the OCG post award RA to enter certifications and compliance approvals needed for the award, such as IRB and IACUC.
Reports	The Reports tab allows the OCG post award RA to enter proposal abstract text for reporting purposes.
Attachments	UH will not use this tab. A customized file storage that the user can accessed by clicking on the View Documents button on the Proposal tab.

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Proposal Profile View

Due By	The Due By link provides information regarding the deadline for proposal submission as directed by the sponsor.
Budget Express	The OCG post award RA will enter the entire award amount and IDC for reporting purposes.
Additional Information	The OCG post award RA will enter additional information including flow-through sponsor and cost sharing.
FA Split%	The F&A Split % link shows how the IDC distribution that will be returned is split amongst the listed investigators by projects.
Location	The Location link allows UH to track the research location on private funding in order to comply with SAM policy regarding sponsored research in bonded buildings.
Protocols, Component, Setup Level, Keywords, Gender & Minority Study, Trainee	UH will not use these links.
Attributes	The Attributes link allows a specific research attribute to be added based on type, such as Cancer, Energy and is also used to identify Non Standard IP and Sponsor Owned Equipment.

Award Profile View

Award Profile View

Award	The Award tab provides information about the award including: title, primary PI, sponsor, assigned OCG administrators, award start and end dates. The Associated Projects are listed on the second part of the Award tab and include the Description (title) and Primary Department Contact for each.
Funding	The Funding tab provides the funded amount and start and end dates for each project. The Posting and Distribution status identify whether a budget has posted to the identified project cost center.
Resources	The Resources tab provides information about any approved sub recipients.
Certifications	The Certification tab allows the OCG post award RA to enter certifications and compliance approvals needed for the award, such as IRB and IACUC.
Terms	The Terms tab allows the OCG post award RA to enter award specific terms and conditions governing the award.
Milestones	The Milestones tab allows the OCG post award RA to enter reporting requirements included on the award, including report types and frequency. Additional information can be added in the comments for each Milestone.
Key Words, Protocols	UH will not use these tabs.
Funding Inquiry	The Funding Inquiry tab shows amounts for the total award, including: Projected Award Amount (anticipated total for the entire award), Reported Award Amount (total amount received from the sponsor), Posted Budget Amount (total budget posted to the general ledger for spending) and Limit Amount (total amount approved by sponsor).

Award Profile View

Funding Inquiry	The Funding Inquiry tab also shows the funded and posted amounts for each project under the award.
Additional Information	The OCG post award RA will enter additional information including flow-through sponsor and cost sharing.
Grant Administrator	The Grant Administrator link shows the contact information for the assigned department administrator for the award.
Sponsor Website	The Sponsor Website link shows the Sponsor's URL Address and website name.
Manage Dates	The Manage Dates link shows the overall award period of performance and each project period of performance dates. This page also shows the KK dates which drives the accounting end date used for validating transactions in PS Finance.
FA Split%	The F&A Split % link shows how the IDC distribution that will be returned is split amongst the listed investigators by projects.
View Proposal	The View Proposal link will take the user back to the Proposal record.
View Contract	The View Contract link will take the user to the Contract record where billing and invoicing demographics are set-up by the OCG post award RA.

Award Profile View

Sponsor	The Sponsor link shows UH's primary awarding sponsor and any contact information.
Attributes	The Attributes link allows a specific research attribute to be added based on type, such as Cancer, Energy and is also used to identify Non Standard IP and Sponsor Owned Equipment.
Department Credit	The Department Credit link shows credit distribution for each project under the award.
Notepad	The Notepad link shows the Date and Time stamp for the award set-up by the OCG post award RA. Additional notes can be added by the OCG post award RA for tracking purposes.
Award Modification	The Award Modification link shows the Reference Award Number (sponsor's award number), the Issue Date of the sponsor award notice, the associated period of performance covered by the award and the amount associated. The OCG post award RA utilizes this page to Generate the UH internal notice of award and to send it to the PI and department administrator.
View Documents	The View Documents button on the Award profile page is utilized by the OCG post award RA to upload the sponsor's notice of award and other documents.

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Find a Project Cost center

Navigation: Grants > Awards > Award Profile > Project

Find a Project Cost center

Internal Notice of Award

Changes

The Internal Notice of Award will change. The notice will be sent to the Principal Investigators, Department Business Administrator and other individuals in the department responsible for the grant management.

Internal Notice of Award

Changes to Budget

Account	Description	Previous Budget Account
B5080	L5 – ANIMALS	B5025 Maintenance & Operations
B5081	L5 - HUMAN SUBJECT	B5025 Maintenance & Operations
B5082	L5 - FOREIGN TRAVEL	B5071 Travel Expense
B5083	L5 - PASS THROUGH >25K	B5024 Pass Thru
B5084	L5 - TRAVEL-DOMESTIC	B5071 Travel Expense
B5085	L5 - TRAVEL RECRUITING	B5071 Travel Expense
B5086	L5 - ALTER & RENOVATION < 5K	B5025 Maintenance & Operations
B5087	L5 - ALTER & RENOVATION >5K	B5019 Capital Outlay
B5088	L5 - RENTAL/LEASE - EQUIPMENT	B5019 Capital Outlay
B5089	L5 - RENTAL/LEASE - FACILITIES	B5025 Maintenance & Operations
B5090	L5-STIPEND PAYMENTS	B5025 Maintenance & Operations

Send questions to psgrants@share.uh.edu