# FINANCIAL SERVICES CONNECTION

## Office of Grants and Contracts

## Elevate PET & Funding Distribution New Functionality – COMING SOON April 20th

On **April 20th**, the Elevate team will be rolling out new functionality for Payroll Expense Transfers (PET) and Funding Distributions in HCM.  Testing sessions were held in March involving the campus personnel and have received overall positive feedback.  We appreciate everyone's time, participation and feedback.  To assist with this go-live, there is a series of training sessions:

- **Webinar** – **April 6th** – Register **here** .  Two sessions for each function will be held.
  - Funding Distribution - held at 10:00AM and 1:00PM
  - Payroll Expense Transfers - held at 11:00AM and 2:00PM
  - In case you miss the live webinar, it will be recorded and available for viewing
  - A **training guide** will be available after April 6th.

- **Structured Labs on Campus** – **week of April 10th and April 17th** – Please register online **here**.  Labs will begin with instruction and general walk-through of functionality and then opened up for participants to work on specific examples/exercises.

| Structured Labs (Anschutz) | Anschutz Dates |
|---|---|
| Session times are as follows:<br>• 8:30-10:00am<br>• 10:30-12:00pm<br>• 1:00-2:30pm<br>• 3:00-4:30pm | • April 13<br>• April 18 |
| **Location: Ed 2 North, 2201DE and Ed 1, 1501** | |

| Structured Labs (Denver) | Denver Dates |
|---|---|
| Session times are as follows:<br>• 8:30-10:00am<br>• 10:30-12:00pm<br>• 12:30-2:00pm | • April 11 |
| Session times are as follows:<br>• 8:30-10:00am<br>• 10:30-12:00pm<br>• 1:00-2:30pm<br>• 3:00-4:30pm | • April 21 |
| **Location: North Classroom, 2413** | |

- **Open Labs on Campus** – Scheduled during the **week of April 24th** and in **May**.  Note:  Registration and more information for May coming soon. Open Labs will have personnel available to assist participants with specific questions and will allow participants to bring real work tasks to create in the system.

| Date | Campus | Location |
|---|---|---|
| April 24 | Anschutz | Ed 2 North, 2201AB |
| April 25 | Anschutz | R1 North, 1309 |
| April 27 | Downtown | North Classroom, TBA |
| April 28 | Anschutz | Ed 1, 1501 |

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## F&A Waiver Changes

*GREAT NEWS!*  We have evaluated the F&A waiver policy and are implementing some changes to reduce F&A waivers for Government and Non-profit/Associations/Foundations.  This policy change was supported by Terri Carrothers, Senior Vice Chancellor, Administration and Finance and Dr. Traystman, Vice Chancellor of Research.

The policy will no longer require a F&A waiver for Government and Non-profit/Associations/Foundations if Agency/Organization –

- Has an overall policy on F&A rate that applies to all awards
- Has stated the F&A rate in the funding announcement (*change in current policy*)

*(continued)*

Please provide URL for stated policy in the notes section of the Proposal Routing form (see below) or attach policy if you have a document.

In addition, waivers may be approved for the current budget year or for the life of the award. If it is approved for the life of the award, then a waiver is not required for every budget year.

It is important to note that **all private sponsors** will continue to require waivers.

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**EXPORT CONTROL**

\*a. Will the project require any *export controlled* information to be received by CU Denver, or is the Program Announcement or Request for Proposals designated as "Export Controlled"?  ☐ Yes ☐ No

\*b. Is project participation (faculty, student, other) restricted based on country of origin or citizenship?  ☐ Yes ☐ No

\*c. Will the sponsor have the right to approve or restrict the publications or other disclosure of the research results?  ☐ Yes ☐ No

\*d. Will the project include collaboration with a foreign organization or be conducted outside of the United States?  ☐ Yes ☐ No

\*e. Will the project involve the shipment of equipment, software, data, or biological materials to a foreign country?  ☐ Yes ☐ No

\*f. Will the project require the use of another party's proprietary information or materials?  ☐ Yes ☐ No

**NOTES**
Add any additional information here

**SUMMARY OF PROPOSED BUDGET**

Budget Summary

| Start Date | End Date | Direct Costs | Subawards | Indirect Costs | Total Project |
|---|---|---|---|---|---|
| 03-Apr-2017 | 02-Apr-2018 | $0.00 | $0.00 | $0.00 | $0.00 |
| **03-Apr-2017** | **02-Apr-2018** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |

\*What is the F&A Rate on the Budget Period for this routing?

Have UCD's standard F&A costs been calculated into the budget? ☐ Yes ☐ No

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# Congratulations Corner

In February, Associate Vice Chancellor for Financial Services & Controller Amy Gannon announced **Ginger Acierno** as *Director – Sponsored Projects Financial Services*. As the Director, Ginger will oversee the Accounting, Billing, and Post Award units. Ginger's 17 years of experience in OGC along with her more recent involvement with the *Elevate* project, will be instrumental in leading the unit as efforts on stabilizing PeopleSoft continue along with efforts to streamline processes and enhance customer support for grants management. Her leadership abilities along with her extensive knowledge of grants accounting and post award administration is invaluable. She is a current member of the HUEG Billing Workgroup (Higher Education User Group for Oracle software) which has provided her with a network of sponsored research peers.

**Ryan Holland** was promoted to *Director – Pre-Award & Contracting Services*. He joined the OGC team in 2012 as a Grants Specialist and quickly advanced to Pre-Award Manager, and was promoted to Assistant Director – Pre-Award and Contracting Services in 2015. The knowledge he has gained over the past several years along with his exceptional leadership abilities will allow Ryan to continue to focus on meeting the needs of our customers while streamlining proposal and contract processes. Ryan is passionate about team building, which developed, in part, during his seven-year career in the United States Army. He was the recipient of the Bronze Star Medal recognizing his exceptional leadership abilities as well as the Meritorious Service Medal for overall outstanding service. Thank you for your service!

Since December, **Koffi Gnatsidji** has been doing a great job as the Billing Manager.  Koffi graduated with a Bachelor of Science in Accounting from CU Denver.  He first became familiar with the billing process while working as a student worker and following graduation, Koffi was hired as a Billing Accountant.  We look forward to Koffi's leadership in Billing and working with the team to continue the hard work to move towards stabilization and new operations.  Koffi's experience with Post Award, Billing, and overall customer service will be instrumental in the efforts to work with the team and our customers on implementing new processes and operations in 9.2.

Most recently, **Kristin Maestas** was promoted to Post Award Lead Administrator.  She began her career in OGC in Pre-Award and then moved to the Accounting section creating project/speedtype set-ups and then over two years ago moved into the Post Award Administrator position.  Before coming to the University, Kristin had over 10 years of business and accounting experience with private entities.  Kristin's proven track record and excellent customer service has allowed her to fill the lead administrator position.  Her leadership and knowledge will prove valuable as Post Award continues to evaluate and streamline business processes and focuses on providing excellent customer service in assisting departments with grants management.

# WELCOME to the OGC Team!

*Other additions to the team include:*

- *Steven Bono – Billing Specialist*
- *Sara Esau – Executive Assistant to Amy Gannon*
- *Alyssa Gest – PreAward Coordinator*
- *Ashley Gonzales – Post Award Administrator*
- *Tami Hoegerl – Sponsored Project Award Specialist*
- *Eric Maize – Contracting Services Subcontract Specialist*
- *Brittany Vits – Post Award Administrator*

# Job Opportunities!

The Office of Grants and Contracts will begin a search for three **Close-out Specialists**.  Go to **CU Careers** to view the posting.  This position consists of a combination of accounting and research administration responsibilities and knowledge including a strong understanding of the administrative systems' functions and configurations.   In addition, this position will work extensively with OGC personnel in all functional areas to bring together the information and functions to provide a cohesive and comprehensive understanding and delivery to our department and sponsor customers.  To see a list of specific job duties, please refer to the job posting.