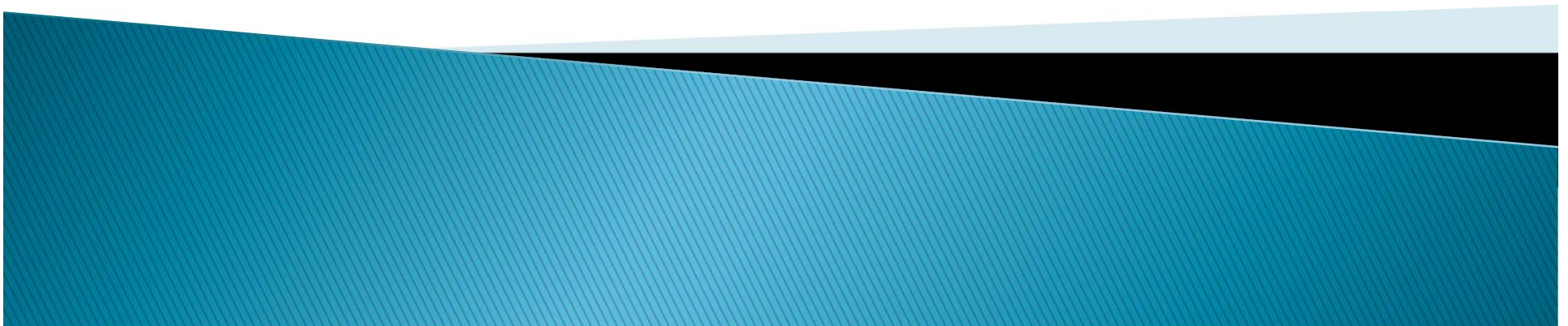


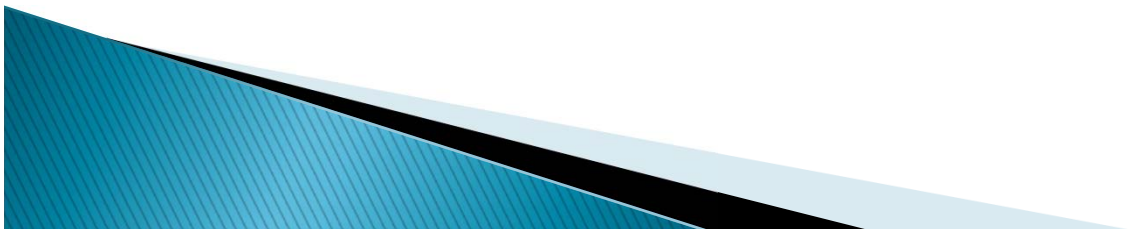
# OGC Team Talks April 2017

Introduction to PeopleSoft Grants 9.2

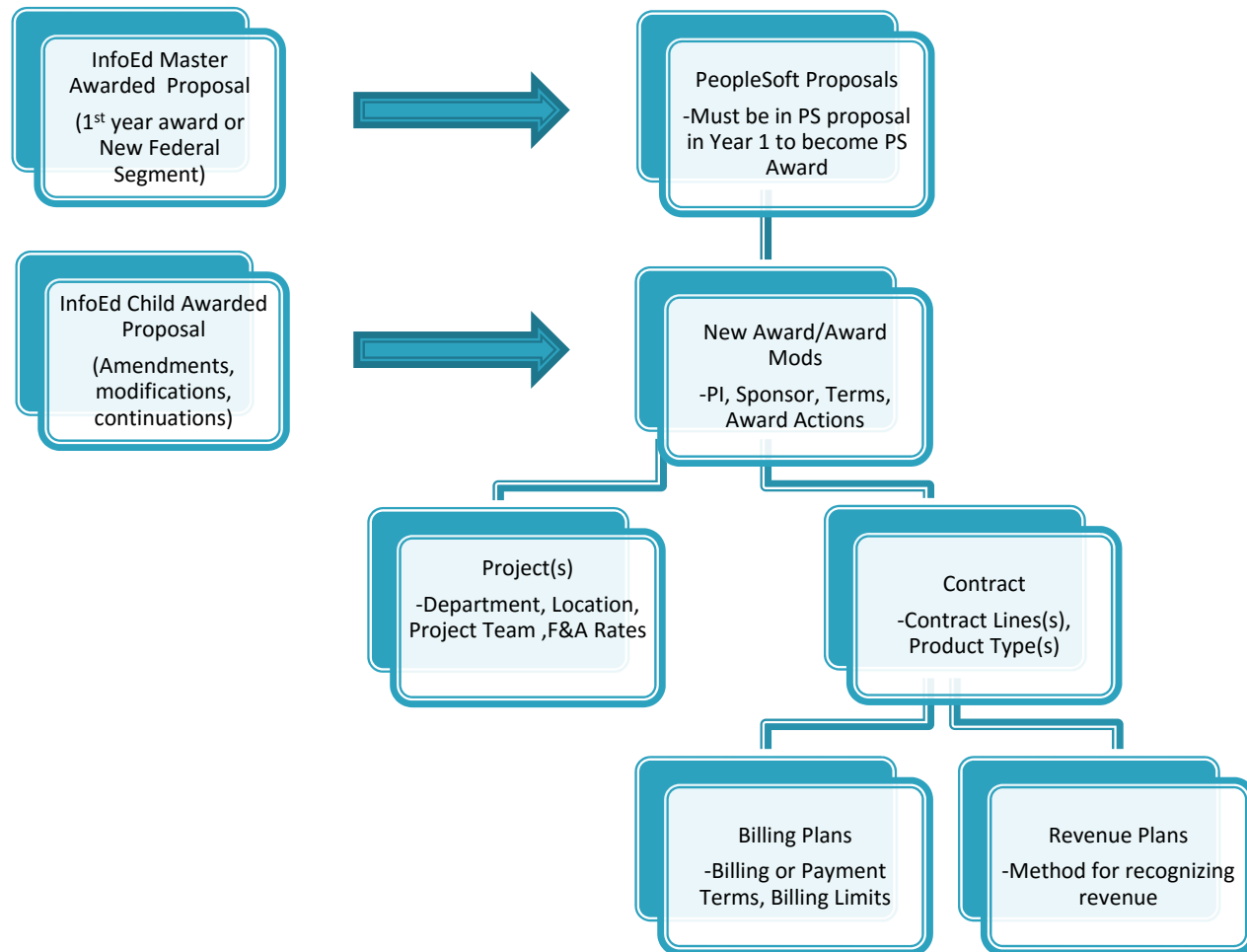


# AGENDA

- InfoEd to PeopleSoft Award integration
- Master–Child proposals
- Basic PeopleSoft grant navigation and attributes
- Demo
- Questions?
- Next sessions in the Grants Team Talks series

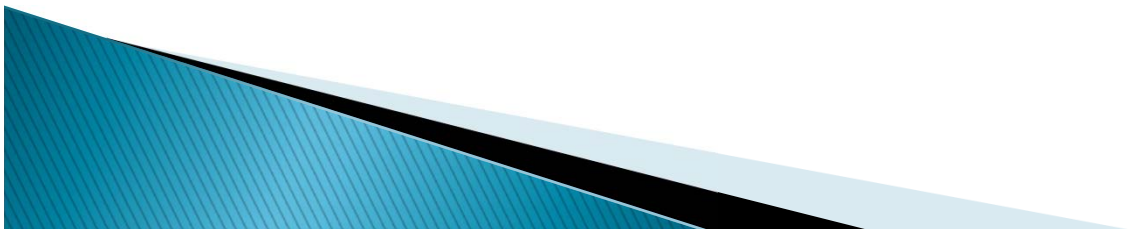


# InfoEd Proposal to PeopleSoft Award



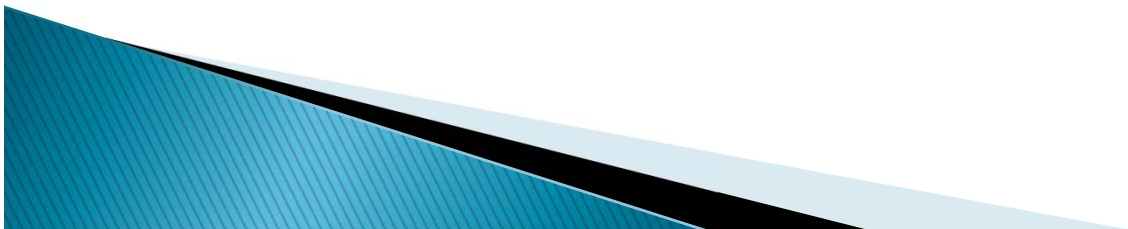
# Master/Child InfoEd Proposal to PeopleSoft Award

- ▶ All proposals in InfoEd are Master proposals until they are designated to be a Child.
  - No change for departments – route as today.
- ▶ Master proposal number in InfoEd becomes Award Number in PeopleSoft –(*NEW*)
- ▶ \*Note, this differs from the sponsor assigned award number, those numbers are stored in Sponsor Reference Award number field.



# Master/Child InfoEd Proposal to PeopleSoft Award

- ▶ Only OGC Award Setup will make proposals a child proposal.
  - Only awarded proposals that are amendments, modifications, or continuations to existing awards will be designated as child proposals.
  - For Federal new segment results in a new PeopleSoft award.



# PeopleSoft Navigation to Awards

Navigation: Favorites > Main Menu > Grants > Awards > Award Profile

University of Colorado  
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Search: All Search >> Advanced Search

### Award Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit = UCD

Award ID begins with

Project begins with

Description begins with

PI ID begins with

Proposal ID begins with

End Date =

Keyword Search begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

- You can search by a variety of ways.
- \*Note award is master proposal/award not sponsor number.
- Once you are in the Award, from there you can navigate through tabs and links.
- There are links to get to project and contract

# Main Award Tab

[Award](#) | [Funding](#) | [Resources](#) | [Terms](#) | [Milestones](#) | [Key Words](#) | [CU Funding Inquiry](#)

---

**Award ID** 163813  
**Reference Award Number**  **Federal Award Identification Number**

---

**Title**   
**Long Description**  206 characters remaining

**Award PI**  **Reporting Role**

**Sponsor** American Cancer Society  
**Post Award Administrator**

**Purpose**   
**Status**   
**Award Type**   
**CFDA**

**Proposal ID**   
**Version ID**   
**Start Date**   
**End Date**

[Contract](#) | [View Proposal](#) | [Additional Information](#) | [Grant Administrator](#) | [Sponsor Website](#)

---

**Primary Project PI** Pearson,Chad G.

Associated Project		
PC Business Unit	Project	Description
UCD	25A5006	ACS CONTR CENTRO DUPLIC

**Go To:** [Sponsor](#) | [Protocols](#) | [Attributes](#) | [Department Credit](#) | [Notepad](#) | [Award Modifications](#) | [Supplemental Data](#)





# Projects listed under Awards




- ▶ Projects existing before conversion are 1 to 1 award/project.
- ▶ Awards created after conversion can contain multiple projects for multiple budget years under one award.






# Project Links

You will see all projects listed here that are associated with the award








Associated Project			Personalize   Find   	First  1 of 1  Last
PC Business Unit	Project▲	Description		
UCD	25A5006	ACS CONTR CENTRO DUPLIC		

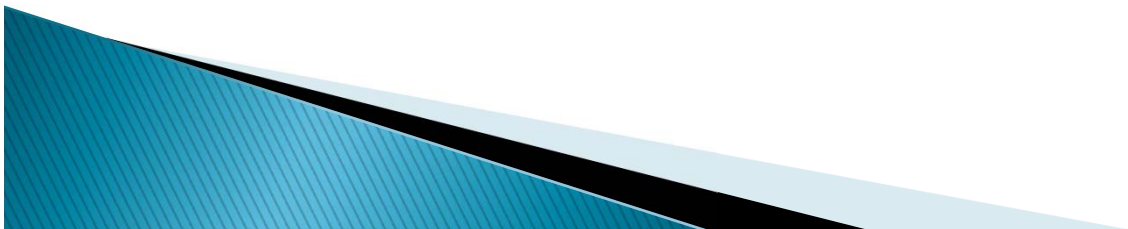
## Link within Project to Project Team

Save as Template      Copy Project

My Projects      Project Valuation      **Project Team**      Project Activities      Go To More 

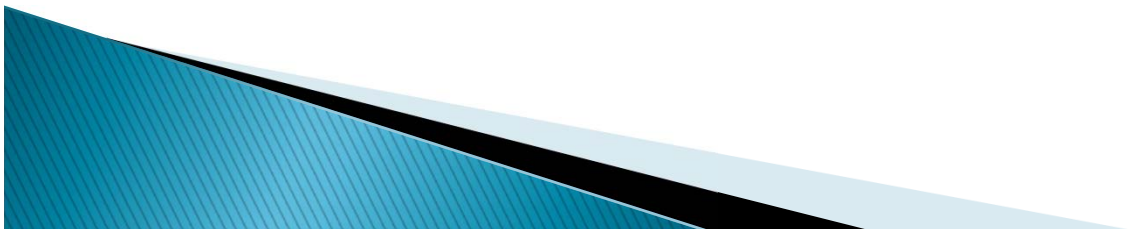
[Return to Award Profile](#)

 Save    Return to Search    Refresh    Add    Update/Display    Include History    Correct History



# Project Teams

- ▶ PI = Principal investigator on award notice.
- ▶ CO-PI
- ▶ GADM = Department Admin (project fiscal manager)
- ▶ GACT = Post Award Accountant
- ▶ Fiscal Staff – still on ST (no changes)
  
- ▶ *Need Updates?* Send to --  
OGC.Fiscalroles@ucdenver.edu



# Project Activities

- ▶ *New* – multiple rates tracked (located under Project Activities, FA Rates Tab)
- ▶ Institutional predefined rate = University rate
- ▶ Funded rate = rate awarded
- ▶ Difference is “waived F&A”



# Project Activities

- ▶ Funded rate = rate calculated on your award

University of Colorado  
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Project 25A5037  
Activity 1

Description NIH RPRM MTR SMTH MCLE  
Description Sponsored Project

**F&A Rate Info** Find | View All First 1 of 1 Last

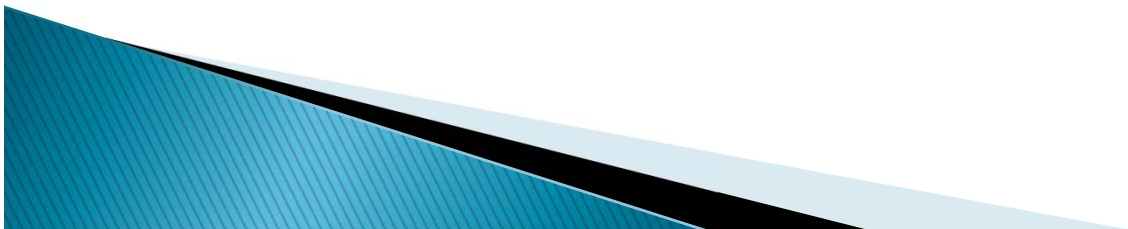
Facilities Admin Rate		RSRCH2011	
Institution		Institution Rate Find   View All First 1 of 1 Last	
FA Base 2		Eff Date 07/01/2015	FA Rate % 55.50
Sponsor		Sponsor Rate Find   View All First 1 of 1 Last	
FA Base		Eff Date	FA Rate %
Funded		Funded Rate Find   View All First 1 of 1 Last	
FA Base 2		Eff Date 07/01/2015	FA Rate % 55.50

▶ Include/Exclude Accounts

Save Return to Search Previous in List Next in List Refresh Add Update/Display Include History Correct History

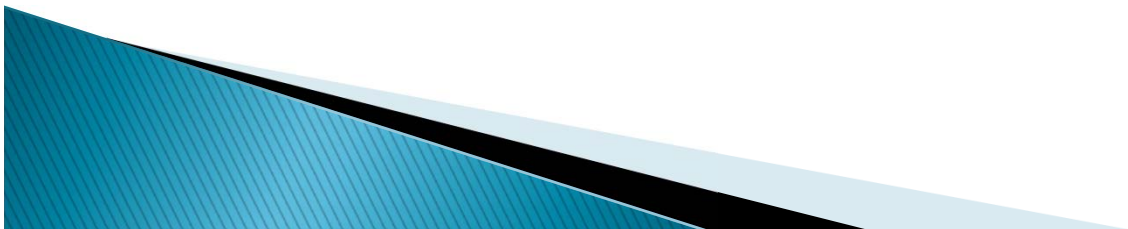
# Contract Module

- ▶ Contract is where Revenue and Billing processes/information are setup
- ▶ Award number = Contract number
- ▶ Contract stores LOC information such as Document number and Subaccount numbers
- ▶ Future Team Talks discuss contract/billing in more detail



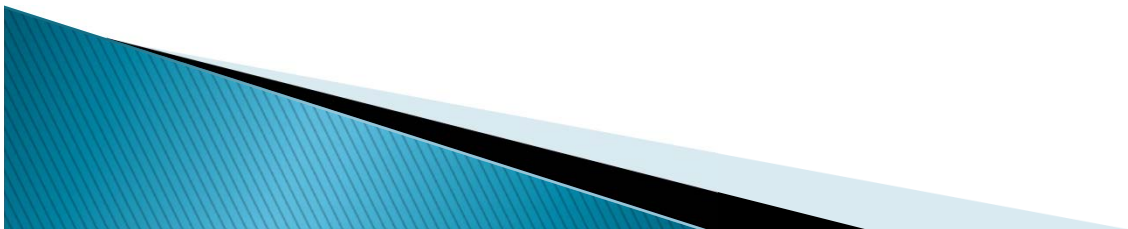
# Contract Types

- ▶ Contract types are used in run controls for many billing processes and are used as a management tool for checking correct setup data.
- ▶ Contract types
  - CR – Cost reimbursable awards
  - LC – Letter of Credit awards
  - IB – Installment Based awards
  - FR – Fixed Rate agreements



# Contract Product Types

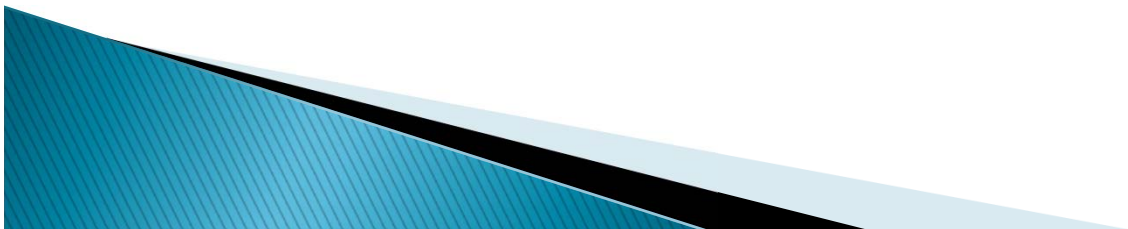
- ▶ Product Types – define how Revenue is calculated. (*NEW*)
  - Grant\_Reimburse – Revenue is based on expenses charged to the project. (same as 8.4)
  - Grant\_Fixed – Revenue is based on payments received and not based on charges to project. (*NEW*)
    - For awards that are paid per something (patient, test, etc....) or paid when certain milestones are met.





# Contract Billing Methods

- ▶ Billing methods – define if bills are created based on expenses or some other value
- ▶ All projects have billing in system – even if actual invoice is not sent out
- ▶ Types include –
  - As Incurred – Billing is based on expenses incurred during the billing period



# Contract Billing Methods

## Types Cont...

- Value Based – Billing is based on a predefined billing schedule that is time based – e.g. sponsor pays each month, quarter or year for a predefined amount, regardless of expenses.
- Milestone – based on meeting a milestone –
  - Patients enrolled
  - Tests performed
  - Goal achieved/product delivered  
(not based on expenses)



# Contract Bill Types

201	UCD Fed LOC Pooled
202	UCD Fed LOC Detailed Subaccount
2AX	UCD Annual Billing
2SX	UCD Semi Annual Billing
2QX	UCD Quarterly Billing
2MX	UCD Monthly Billing
2CT	UCD Rate Based Billing (FIXED RATE OR PRICE) *These are in most instances department billed
2IN	UCD Installment Billed
2DB	UCD Legacy Department Billed (Converted Projects only not use in new setups)
2GR	UCD Grants Billing (Conversion cleanup only not used in new setups)
2PI	UCD Program Income (Not used in new setups, program income is not billed in system)

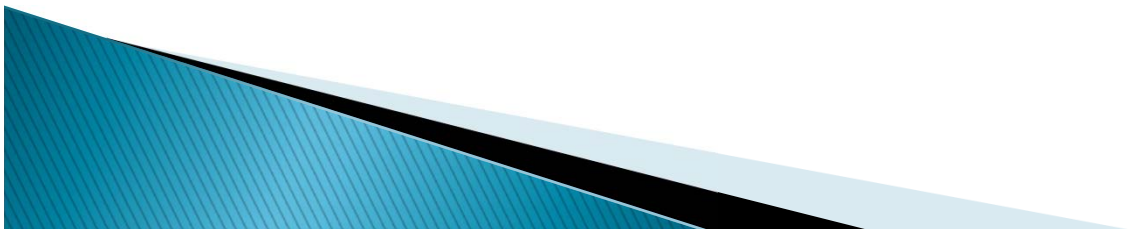
Replaces old AR type on Mfin report header

\*Note right now almost all showing as 2GR Carl is working on fix to display correct value.



# Live Navigation Demo

- ▶ Grant with Multiple Years/ and or Multiple Projects
- ▶ Clinical Trial Award
- ▶ Converted Award/Project
  - Award/Contract number = Project#CONV
  - Ex: 2512345CONV



# New Award Notification Emails Coming Soon!

- ▶ Notice will contain terms and values discussed throughout presentation.
- ▶ Automated Notification to all individuals with roles on Project Team and ST Fiscal Staff.



# Future Sessions

- ▶ **Contracts Module Details**
  - Revenue recognition and billing limits
  - Project costing transactions and GL
- ▶ **Billing**
  - Understanding billing and how to obtain billing information via pre designed queries
- ▶ **Accounts Receivable**
  - How to review payments received

