

Michigan State University
Contract and Grant Administration
Post-Award Newsletter- Issue 1 – December 2011
Table of Contents

What Exactly does CGA Do? And whom should I call when I need help?.....	Page 1
CGA Quiz Time.....	Page 2
KFS.....	Page 2
Did you get the answer?.....	Page 3
Cost Policy Reminders.....	Page 3
Questions and Answers.....	Page 4

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Post-Award Newsletter – Issue 1 – December 2011

A light-hearted collection of tips, hints and useful information to help you better administer your sponsored research projects. By Karen Rich

What exactly does CGA do? And whom should I call when I need help?

Contract and Grant Administration handles the post-award administration of sponsored projects. This includes (but is definitely not limited to) award set up, financial reports, approval of certain expenditure docs, requesting payment from sponsors, administering sub-contracts, prior-approval requests from agencies, effort reporting, and F&A calculation and negotiation. Basically, if it is something that happens after the award is received and negotiated by MSU, CGA is the office that can help you. (There are a few exceptions to this, most of which involve international projects and certain federal contracts. If you are unsure if your situation is one of those exceptions, please contact us and we will point you in the right direction.)

Now, to whom should you direct your questions? There are approximately 30 people working in CGA right now, and hopefully that number will continue to grow. Additionally, as we attempt to make the best use of our resources and cross-train staff, individuals' responsibilities can change. That said, getting assistance from CGA within a reasonable period should be less of a hassle than contacting your cell phone provider.

If you have absolutely no idea whom to contact, please check out the following link that

describes the four groups into which CGA is divided, and includes contact information for each. <http://www.cga.msu.edu/PL/Portal/DocumentViewer.aspx?cga=aQBkAD0AMQA5ADQA>. Please also see the CGA org chart under the *Contact OSP & CGA* heading.



While the use of a group email seems impersonal, it allows any member of the team to respond. When you send an email to the group, be sure to include as much information as possible. Really, we get a surprising number of emails that don't include account numbers! Saying, "my NSF grant," or "my Malawi project" is not enough for us to go on. MSU has thousands of awards, and, with the possible exception of the FRIB, we don't have the account numbers memorized. If you include the account number and as much relevant information as possible, it will make it that much quicker for us to get back with you.

If you have something that can't wait, or if the response you receive from the group email has created more questions, please contact a manager.

Awards Group Manager Shaun Krick
email: kricksha@msu.edu
phone: 517-884-4252

Transactions Group Manager Kristy Smith
email: smith@cga.msu.edu
phone: 517-884-4247

(Please note that Kristy is currently out of the office and will be back after the first of the year.)

Reports Group Manager Kasey Schiellerd
email: march229@cga.msu.edu
phone: 517-884-4289

Cash Management Manager Mustafa Khawaja
email: khawaja4@cga.msu.edu
phone: 517-884-4287

(Please note that Mustafa is currently out of the office and will be back after the first of the year.)

Finally, if you know someone in CGA who has helped you before, go ahead and get in touch with that person. It is likely that they can point you in the right direction.

CGA Quiz Time!



Answer the question, win bragging rights! There is one, and only one, situation that will require you to ad-hoc route a document to CGA, ever. What is that situation? Find the answer later in the newsletter.

KFS

Can you believe it has been a year since Go-Live? A year! You know what that means? It's no longer the "new" financial system; it's just the financial system. If your office is struggling with the change, please check out the training opportunities still available from EBS.

<http://ebs.msu.edu/Events/OneToOneSupport.htm>

Additionally, the help desk phone number is 517-884-3000.



One of the great features of KFS is the Route Log. Gone are the days of trying to track down where your paper vouchers are hung up. Now, all you have to do is open the document you are tracking, and click on Route Log. Here you will see a summary of who created the document, the title and type, and its status! Below that you will see a list of all the actions that have been taken, and when they happened. To see where a document is in the route, look at the next section called Pending Actions. You see the action called In Action List? That is the person or group that currently has your document. If you click on their name, or the name of the group, you will get the contact information and can easily call or email to see what the hold-up is. (Please note, if your document is pending a group approval such as CGA Processor Level 1, you will see a long list of names. Please don't email everyone on this list. Pick one, or send an email to transactions@cga.msu.edu.) Below that is a section called Future Actions. This area will list all the stops the document has yet to make before it is final. So much information, right there at your fingertips! (A quick tip, if you are traveling and don't have KFS bookmarked on your laptop, there is a link under the post-award tab on the CGA website.)

<http://www.cga.msu.edu/>



Did You Get the Answer?



The only time you need to ad-hoc route a document to CGA is when you are reconciling a travel advance with a Distribution of Income and Expense (DI) form. Please be sure to ad-hoc it to the CGA Processor One group, and not to an individual. All other documents are automatically routed to CGA via the business rules built into the system.

Cost Policy Reminders

Meals, snacks, and beverages, oh my! What exactly are the rules for charging them to grant accounts?



Yes, taking colleagues, clients, and business associates out for lunch or dinner is a standard practice in the business world, as is providing coffee and light snacks at a meeting. You, however, are not engaged in a standard business, you are engaged in research administration!

Charging food and drink to federal awards while not in travel status is one of the most risky transactions you can include on your project. It can be

allowable, but CGA is going to ask for quite a bit of information. We will require:

- An itemized receipt listing the food and beverages purchased. Yes, we are making sure that there is no alcohol on there.
- An agenda for the meeting.
- The business purpose of the meeting, including why it had to be held at a meal time.
- A list of the participants, including their affiliations.

Meals for MSU faculty and staff usually cannot be charged to federal awards. Exceptions are when the faculty or staff is in travel status on behalf of the project, or the meal being charged is part of a meeting or conference with persons from outside of MSU at which attendance is not optional. Due to conflict of interest issues, meals for federal employees cannot be charged to federal awards. It will speed up the reimbursement if you know the rules include all this information when you submit the DV, and put the charges for any MSU or federal employees on an unrestricted account.

The rules for charging meals to foundations, State of Michigan awards, and awards from for-profit corporation vary widely. Be familiar with the terms and conditions of your award, and spend accordingly. Any questions?

Why do I need to do all that work? Meals/meeting refreshments are included in my approved budget.

Excellent! To speed the approval of your reimbursement, please mention that in your explanation, and go ahead and attach a copy of the relevant budget and justification.

Really? MSU faculty and staff cannot charge meals to federal projects?

Not quite. Meals are allowable during overnight travel and during non-overnight travel to mandatory meetings where business is conducted with persons outside of MSU.

But if a representative of a federal agency does a site visit to see what we are doing and evaluate our progress, then we can include them right?

Small amounts can be paid from non-restricted accounts, but no, not ever from a federal account. Just don't do it!

Questions & Answers

I put through a rush transaction two days ago! Why hasn't it been processed yet?

Unfortunately, when we pull up the action list, (we average about 250 new items a day!) items with special handling don't blink, or appear red or anything. When you process a payment that includes a special handling rush fee, please notify the CGA transactions group with an email to transactions@cga.msu.edu.



Our PI left MSU for job at Very Far From Here University, so he can't sign this document. Is it OK if I just do it for them?

Yes, if you are the department chair. In the event that a PI signature is required and the PI is unavailable, because they moved, because there is not a good internet connection in that part of the Kalahari, etc., the department chair can sign in place of the PI.

But the PI is the department chair! or But the department chair is with the PI while they are traversing the Amazon in a dugout canoe!

Then a dean, or an associate dean, would be fine.

CGA is always talking about audits. Whenever you ask for more information, you use phrases like, "in the event of an audit" or "for audit purposes". Are audits really that big of a deal?

If you have ever been through a federal audit of one of your projects, you can smile smugly and skip the rest of this answer.

The rest of you, pay attention. When the federal government comes in to do an audit, they randomly select expenses to look at. They want to see all the backup documentation to ensure that all spending was in compliance with the terms and

conditions of the award, and that MSU followed our own internal policies. (Yes, they look at that, too!)

The auditors will pull a selection of expenses, including salary, travel, sub-contract payments, etc., and it is critical that all the appropriate information be there.

Imagine this. You have a five year federal award, and you use your two no-cost extensions, making it a seven year project. The standard record retention is three years after the project ends, and the agency can come audit at any time within that period. If an agency conducts an audit at the end of the retention period, they might request documentation from the first year of the project. Those expenses are almost ten years old! (Seriously, this really happens. We have an audit going on right now that is asking questions about expenses incurred in 2002!) Ten years from now, are you going to remember who you called with that phone card you purchased in Burkina Faso, or are you going to recall with whom you ate lunch and what you discussed at that meeting you had to have at Sansu? Will you even still work at MSU? It is so much easier to collect all the information at the time the expense is incurred.

Still not convinced that proper documentation is important? In 2009, Yale had to pay back \$7.6 million for improper effort reporting and cost transfers. Imagine explaining that to your Dean.

What in the world is a CGA Post-Award Newsletter? Why am I getting this? I love it/hate it/have comments/questions, whom should I contact?

CGA is working to improve customer service. One way we are trying to do that is by improving communication with campus. The hope is that a semi-regular communication that is informative and fun to read will help with that.

If you have questions about anything you have read here, would like to make comments, have a topic you would like covered or a question you would like answered in a future issue, please contact Karen Rich at rich@cga.msu.edu. Please include CGA Newsletter in the subject line.



Coming next month:

Everything you ever wanted to know about sub-contracts but were afraid to ask!