DGA Roundtable Minutes – June 3, 2019

**1:30 – 2:30 pm, IRIC 305 (above the Atrium)**

Call-in Number: Zoom Join from PC, Mac, Linux, iOS or Android: <https://uidaho.zoom.us/j/687069559>

– See Calendar Invite for additional details on zoom access.

Zoom: Please remember to mute your zoom microphone unless you are speaking.

IRIC participants: Please remember that side conversations during the discussions make it difficult for our off-campus and other zoom participants to hear and participate.

ITEMS OF IMPORTANCE:

1. Process change: If a third request has to be sent by OSP to a department for a necessary action related to a sponsored project (such as a PCT, removal of an unallowable cost, submission of an item for review/setup, submission of a delinquent report, etc.), the Assistant Vice President for Research Administration will be copied on the email request and she will respond and add the Department Chair and Dean to the email notice.
2. Greetings and Introductions
   1. **Reminder**: Please utilize sticky notes for questions/comments that are not relevant to the whole group, or for additional questions when we are running short on time. Please write your email and the topic that you are referencing (or speaker name) so that we can get the question to the correct presenter. For zoom- please send a chat message or email!
3. Banner Screens:
   1. FRIGITD – Kris Freitag (PowerPoint slides provided)

FWRGBCH is working in Banner.

Answers to questions on budget transfers:

1. If there is greater than a 25% change in the awarded budget, this could signify a change in scope of work, which always requires sponsor prior approval (APM 45.14).

2. Don’t necessarily need to move the funds in each line, this preference is up to each department, except when budget transfers are restricted by sponsor. This is always noted in the grant’s FOATEXT.

3. FWRGBCH is only a tool for use, and doesn’t work if you don’t move the funding in the budget lines.

4. Some sponsors do not allow any rebudgeting, so keep this in mind.

5. Personnel costs are bundled together, so it is not necessary to distinguish between faculty, staff, students and IH unless the sponsor mandates it. Once in a while fringe is considered a different line by a few sponsors (including ISDA).

* 1. NBAJOBS – Theresa Albright via zoom

To see all of the positions for an employee, set the date to 7/1/1995. For positions prior to that date check with HR. Four zeros in a V# indicates an employee has been here a really long time. Running the report using the early date shows all positions – details at the bottom of the screen. Alt + Page Down – down arrow. Alt+S pulls in information and saves it. Only pulls information specific to that time. Encumbrance Info = Index

Can use Argos – all at once for info.

NBA Jobs – term report on HR side

Department report – NWRDERP

Clicking on the Tools button in upper right – and then on Related = Shortcuts to reports

* 1. FOATEXT – OSP and Theresa Albright

FOATEXT on documents – explain what it is (cost transfer, etc.), why it is needed, how it is related to the project, and your contact information and the date. Reference any related document #s (I doc, JV, CV, etc.).

FRAGRNT, Related, FOATEXT – snapshot of award terms and closeout dates

135-136 – easy way to tell if there is carryforward

176 – shows % of rebudgeting to the date shown in the text line

Lists of FOATEXT line designations – attached.

* 1. FRIPSTP/FRIPSTG –Sarah Martonick

STG – V# or use the box with three dots in it to look up V# by last name/first name. Double click to bring it back to the main page of FRIPSTG (or STP).

SPAIDEN will help you to get correct V# using email if needed (NBAJOBS would work too, using position title/#).

Page down/go – will show every grant as PI/CO-PI. FRIPSTP shows proposals submitted.

You can use F7 to filter by key word (title), A for Active in status (or I for inactive), etc. F8 to execute your query.

FRIPSTP - only EIPRS proposals and awarded (and setup) VERAS proposals. With VERAS, only awarded proposals will be exported to Banner at the setup stage.

1. Argos report:
   1. FWRPBSR – Cheryl Chambers – will occur in a future meeting.
2. E-Code tool – Joe Christensen – Spreadsheet attached and link: <https://www.uidaho.edu/finance/controller/general-accounting> (under ‘Resources’ titled Expense Code Lookup Tool).
3. Open session for Banner screens and Argos reports demonstrations as requested or offered by the group. – nothing additional shared
4. Other:

Chrome River – concerns about participants who later became employees and vice versa – how to get them paid in Chrome River when unable to set DGA as delegate because participant/employee no longer able to access the system? Have needed to set other UI employee as delegate for payment and then pay participant/employees directly from personal checking account.