

DGA Roundtable – August 6, 2018

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/9971473726>

– See Calendar Invite for additional details on zoom access.

1. **Zoom greetings and sign-in sheet.** Please sign in as you arrive or announce your arrival on Zoom!
 1. Thank you all for attending!

2. **Updates to Agenda –**
 1. First up will be a ‘Cost Accounting Minute’ from Rebecca Marquez
 2. By a show of hands – the group has chosen the Chart V discussion.
 - a. Heather Nelson and Linda Campos joined the meeting to address questions during the discussion.

3. **Cost Accounting Minute –** Rebecca Marquez
 1. Rebecca handed out a Quick Reference Budget Category table to help identify the new budget categories numbers.
 2. Sponsor pre-approval is needed whenever a PI or Co-PI’s effort changes by greater than 25% of the originally proposed effort. A question was raised as to whether this is based on the Uniform Guidance or UI policy – Rebecca is checking on that and will let us know.
 3. Please email Wendy Kerr wendyk@uidaho.edu – for those who received notification that a Cost Share index has been setup for them, Wendy must have the “from” index ID on the completed EPAF appointments.

4. **Institutional Review Board (IRB) website and Veras Presentation –** Jennifer Walker
 1. Jennifer provided an overview of the resources available on the Office of Research Assurances [website](#) and walked the group through some of the resources available for IRB protocol applications to the [Institutional Review Board](#) using the online submission system called VERAS.
Jennifer went on to explain the required [CITI](#) training for PIs and timing of renewals. DGAs are encouraged to direct investigators to ORA if they have any questions about the protocol submission process or required training. This process should begin early as budget setups may be delayed until compliance protocols are in place.

5. **Post Award Updates –** Vicki Russell
 1. Vicki let everyone know that Post Award is running behind on award processing by approximately one month and asked that you please be patient with them.
 2. Subawards are continuing to be processed and OSP is working out the kinks with Chart V.

Pre Award Updates – Ann-Marie

1. Pre Award is experiencing a high volume of proposals at this time due to multiple sponsor deadlines falling in the same date range. If you know of PIs planning to submit proposals, please ask them to put their materials into EIPRS as soon as possible to ensure adequate time for review prior to submission.

6. Chart V Discussion

Q – How can we get a summary of everything for an award?

A – FRIGITD – gives a summary; use ‘by sponsor account’ to see by primary expense code

- Budgets are all in there now (except for a small handful missed and that Ron should be fixing this week). To see detail beyond ‘monthly cumulative total’ need to use chart 9 for expenses that posted prior to 7/1/18–
- FGIBAVL – salaries for example – should be correct
- Participant support has been separated out from tuition – participant support should be in 32
- We will create a new budget pool category for F&A so that it doesn’t show up with the direct cost budget pools

Q – Is it possible to send information more into laymen’s terms vs ‘In FRIGITID’?

A - There are screen shots out there now – sent by Rebecca today

Q – Are the indexes and grant codes updated in real time in Argos?

A – Yes – pulling from production. Pending documents are still in FGIBAVL

Q – Is there a crosswalk to get to the grant code?

A – One. Ron created one that gives you everything: Argos/Production/Departmental Financial Reporting/ Chart V Crosswalk Queries/ Organization Crosswalk Query. You need your old grant code (used to also be the Org Code) to get the data. Only thing missing, unfortunately, is the new grant code. Heather will see whether that can be added.

University of Idaho Organization Code Crosswalk Queries

Organization Code

Chart 9 Orgn	New Index	New Fund	New Orgn	New Prog	New Activity	New Location
BJKR42	846552	222274	846	02ESO	AGWOOJ	AGPARM

Q – Payroll – not correct

A – Detail report in the process of being corrected.

Q – A list of all the reports that say specifically what they do in Argos? FWRITEM – how to get that detail?

A – FWRITEM still working – 7/1 and beyond is in Chart V. Up to 6/30 to get detail you need to use chart 9. HN sent out VandalWeb thing via tip of the week. Note that monthly reports are turned off until we can figure out how we want them by index.

Q – Grant codes with numerous indexes. How to know which one it is?

A – Request to HN to fix that – one of the things talked about with L. Campos. Disconnect could be alleviated with singles – on multiples need to figure out a different strategy. If you know the index you can type that into FRIGITD. Does Kenwyn see a document number when it is overdrawn? She will double check.

Q – Keep track of index code, grant code – any way to simplify?

A – You shouldn't have to keep track of the fund – index tells you what the fund is. (Some of the old reports are run only by fund/org). The fund will tell you the last 4 digits of your grant code – wildcard last 4 digits to search. Purchasing and claim voucher systems – don't show anything beyond the index. Need to parse out the difference between grant/university issues.

Q – Many reports are based on grant code. Summary report by each person by each grant.

A – Payroll detail report grant code index fund – she has put together a new report. In general for reports – pretty good list of those that work/don't and rationale of whether to replace them or not. Either there is a Banner replacement, Argos or VandalWeb replacement. Still working through the Banner reports – hope to have them out within a month. Can send them out while in production so everyone can access them. (Linda Campos will send a copy to HN or AMB to get out to the DGA listserv). Kenwyn sent a short list a few weeks ago

Q – VandalWeb reports – put in replacement index – need org – Only need org.

A – Structure is different – need to think about it differently – the data will look different. General Accounting is working out how people use reports so that can be updated.

Q – Most of the reports feel like they are giving overall balances – need to separate out by grant rather than being able to separate. Based on roll up instead of individual grant. Feel they need to be broken down more.

A – Key is going to be the key – as many pieces of the puzzle into the parameters will help to get what you need. Some cleanup needs to happen on the names of the parts – org, index, and fund. They want to be able to put the index in and get information for just that individual item.

Q – Can we get something that gives a snapshot of each individual grant within an org code?

Q – Off Campus – multiple roll up codes – way to do a search by activity code (PI) with the changeovers – commodity commissions – hard to know which ones have happened/or not. FRIPSTG – by grant – type in V# - active/filter. EPPN/PI with PS Co-PIs – 870 + 846 as part of index... doesn't necessarily mean these people are in these – now when they are sharing those org codes on the index.

A – This is correct - some of these indexes don't follow this logic. The index is correct it is just that it is following the org code. Are you trying to get to the total overall?

Q – Received grant code – it did not help her to see which PIs had been awarded which part of the award. The answer she received seemed vague.

A – Have talked about how it is important to send out the index and grant codes. ON the financial unit side that disconnect has been corrected (screen shot that shows index). There was only one index set up, but three should be set up once it is fully set up. Adding PIs name to the index – in funds can arrow down to match PIs name and title. FRIGITD index and fund code.

Q – Grant code only works for anything used by OSP.

A – Grant code becomes the index – tradeoffs in all these indexes? Multiple funds?