

# Sponsored Programs & Research Services PI Guidance for New Awards

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# SPRS Post Award Contacts

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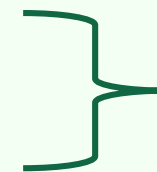
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# Chartfields (PeopleSoft “Account #s”)

- Find your Grant’s Chartfields:
  - In your original Notice of Award email
    - See Accountant if you need another copy
  - By running a financial report *(see next slide)*

▪ All accounts **at least** have a:

- Fund code (4 digits)
- Department code (4 digits)
- Program code (2 digits)
- Project ID (varies)



See [Chartfield Values](#)  
for breakdown of  
eligible values

**EXAMPLE:**

“My fund code is 0262, department is 1920, program code is 10, and project ID is 200008125.”  
“I also have been given a PI Account with a project ID called PIJOHNDOE.”

| Type of Account  | Purpose  | Chartfield Format  |
|--|--|--|
| <b>Award or Participant Support</b><br><i>(Project # begins with “2000...”)</i>            | Charge costs the sponsor is funding                                    | Fund-Department-Program-Project ID<br>0262-1920-10-200008125 (example)             |
| <b>Cost Share</b><br><i>(If applicable, class # for cost share will always be “80000”)</i> | Charge CSU’s required share of project costs                           | Fund-Department-Program-Class-Project ID<br>0262-1920-10-80000-200008125 (example) |
| <b>PI Account</b><br><i>(Fund = 0010, Department = 1707, Program = 10)</i>                 | Credit the PI’s share of recovered F&A, indirect, costs for future use | Fund-Department-Program-Project ID<br>0010-1707-10-PIJOHNDOE (example)             |

# How do I ...

| Question  | Answer   |
|---|--|
| Request a re-budget or No cost extension (NCE)? | <a href="#"><u>Internal Prior Approval Form (IPAF)</u></a>   |
| Request NCE for NSF?                            | <a href="#"><u>Process for NCE for NSF awards</u></a>  |
| Obtain my detailed financial report?            | <a href="#"><u>Instructions to Access Reports</u></a><br>Awards – “Grant Summary Report”<br>Cost Share – “Statement of Operations” |
| Understand the financial report?                | Contact Accountant to review   |
| Ask other questions?                            | Contact Accountant to review   |

*\*\*\*\*\*SPRS strives to respond to all questions within 24 hours;  
 if Accountant is out of the office, contact Jessica Dlugolinski or Teri Kocevar*

# Initiating Salary Charges

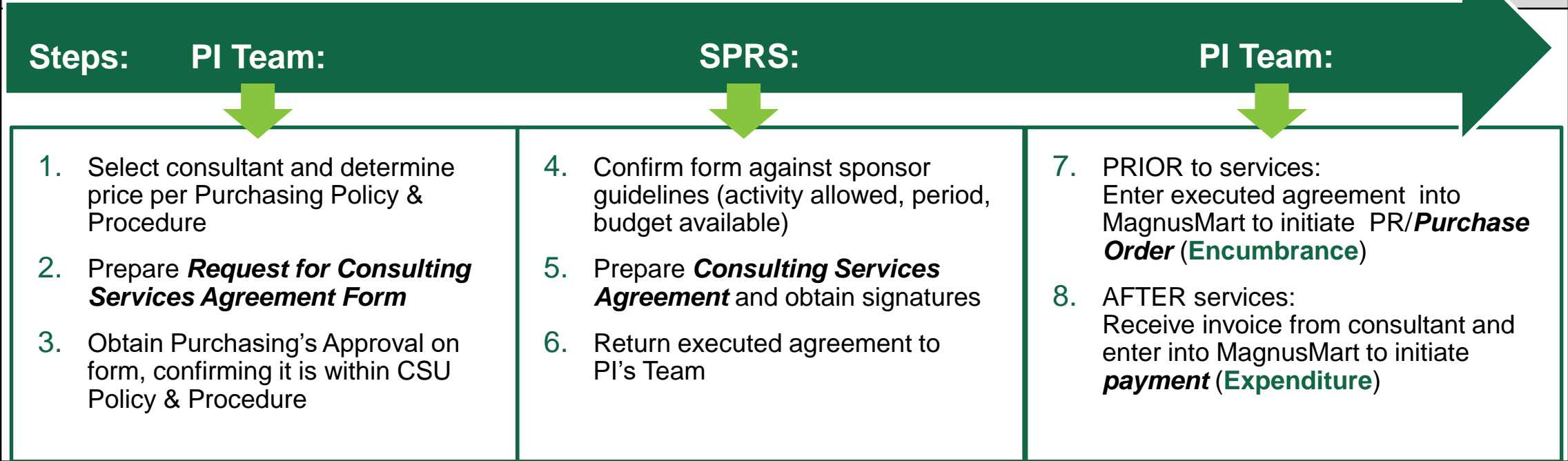
| Form / Policy & Procedure           | Purpose   | Contact   |
|-------------------------------------|---|---|
| <u>Standard Employment Contract</u> | Hire full and part time <b>staff</b> positions<br>(e.g. Post Doc)                 | <ul style="list-style-type: none"> <li>• College Budget Manager</li> <li>• Jean McCafferty</li> <li>• <a href="#">Dept/College HR Consultant</a></li> </ul> |
| <u>CSU Release Time Form</u>        | Charge portion of <b>faculty salary during the AY</b><br><i>** PI to initiate</i> | <ul style="list-style-type: none"> <li>• College Budget Manager</li> </ul>  |
| <u>Summer Salary Policy</u>         | Pay <b>faculty summer salary</b><br><i>**PI to initiate</i>                       | <ul style="list-style-type: none"> <li>• College Budget Manager</li> </ul>  |
| <u>Graduate Assistantships</u>      | Hire a <b>Graduate Assistant</b>  | <ul style="list-style-type: none"> <li>• College Budget Manager</li> <li>• Tonita May (x3625)</li> </ul>  |
| <u>Hourly Student Employment</u>    | Hire <b>hourly student worker</b>   | <ul style="list-style-type: none"> <li>• College Budget Manager</li> </ul>  |

# Initiating Non-Salary Charges

| Form / Policy & Procedure   | Purpose   | Contact  |
|---|---|--|
| <p><b><u>Magnus Mart and Purchasing Policy &amp; Procedure</u></b></p> <p>Or, consider applying for a <a href="#">CSU purchasing card ("P-Card")</a> which can direct charge your award</p> | <p>Order <b>Supplies/Equipment</b>:</p> <ul style="list-style-type: none"> <li>• &gt; \$2,500 - obtain 3 quotes or waiver</li> <li>• &gt;\$25,000 - competitive selection</li> </ul>  | <ul style="list-style-type: none"> <li>• College Budget Manager</li> <li>• Mike Eames, Purchasing</li> </ul> |
| <p><b><u>CSU Travel Form</u></b></p> <p><b><u>CSU Travel Policy</u></b></p>   | <p>Obtain pre-approval for <b>travel</b> and post travel reimbursement</p> <ul style="list-style-type: none"> <li>✓ Obtain SPRS preapproval</li> </ul>  | <ul style="list-style-type: none"> <li>• College Budget Manager</li> </ul>                                   |
| <p>Various CSU Policies &amp; Procedures</p>  | <p>Order goods and services from <b>internal CSU College/Dept</b>, e.g. Bookstore, Printing, Catering</p> <ul style="list-style-type: none"> <li>✓ Notify &amp; update account numbers when ordering</li> <li>✓ Obtain SPRS preapproval for catering</li> </ul> | <ul style="list-style-type: none"> <li>• College Budget Manager</li> <li>• SPRS Accountant</li> </ul>        |

# Initiating Non-Salary Charges (Continued)

| Form / Policy & Procedure  | Purpose   | Contact   |
|--|---|---|
| <p><u><a href="#">Request for Consulting Services Agreement Form</a></u></p> <p><u><a href="#">Purchasing Policy &amp; Procedure</a></u></p> | <p>Order <b>consulting</b> services:</p> <ul style="list-style-type: none"> <li>• &gt; \$2,500 - <i>obtain 3 quotes or waiver</i></li> <li>• &gt;\$50,000 - <i>competitive selection</i></li> </ul> | <ul style="list-style-type: none"> <li>• Mike Eames, Purchasing</li> <li>• Jessica Dlugolinski, SPRS</li> </ul> |



# Initiating Non-Salary Charges (Continued)

| Form / Policy & Procedure  | Purpose   | Contact   |
|--|---|---|
| <u>Magnus Mart and Purchasing Policy &amp; Procedure</u>   | Pay for <b>participant support costs</b> (stipends, other set up costs, etc.)<br><input type="checkbox"/> <i>Use specific account number provided by SPRS for Participant Support Costs</i> | <ul style="list-style-type: none"> <li>• College Budget Manager</li> <li>• SPRS Accountant</li> </ul> |
| <u>Gift Card Request Form</u><br><br><u>Gift Card Guidelines</u><br><br><u>Human Subject Payment Receipt</u> | Pay <b>human subjects</b>   | <ul style="list-style-type: none"> <li>• College Budget Manager</li> </ul>                            |
| <u>Subrecipient Information &amp; Commitment Form</u><br><br><b>Specific Sponsor Terms</b>                   | Contract with and pay <b>Subrecipient</b>   | <ul style="list-style-type: none"> <li>• Teri Kocevar, SPRS Director</li> </ul>                       |



# About Sponsor Charges (Continued)

*All costs must be reasonable, necessary and allocable.*

## Reasonable

- price paid is what a prudent person would pay.

## Necessary

- the project could not be completed without it.

## Allocable

- the project was only charged its share.

example: if you purchase software that will benefit multiple projects, each project must be charged its estimated share, such as 25% of the total software cost.

# About Sponsor Charges (Continued)

## Chartfield

- All costs must be directly charged to the correct chartfield at the time of **order** (employee contract, student form, purchase requisition, etc.).
- Coordinate correction of errors with Budget Mgr. to submit journal entries to [sprsjournals@csuohio.edu](mailto:sprsjournals@csuohio.edu).

## End Date

- All goods and services must be **received prior to the end date** AND needed to complete the scope of work.
- Last minute spending, or shifting prior costs from other CSU accounts, in an attempt to “spend down” is disallowed.

# Other Planning Considerations

## Sponsor Reports and Revenue

- PI responsible for **programmatic reports**
- SPRS Accountants responsible for all **financial reporting**, including sponsor invoicing and deposits

## Cost Share

- PI is responsible for ensuring charges between cost share and award accounts are correct per sponsor terms

## Other Administrative Requirements

- If purchasing **equipment**, review the award requirements
- If earning income from other parties (e.g. conference fees if CSU is hosting), review the award "**program income**" requirements
- If selecting recipients (e.g. scholarships) review the award **eligibility** requirements