

# Arts & Sciences Managers' Meeting Minutes

## February 11, 2015

### Speakers

Sharon Brooks  
*Director of Post Award and Cash Management  
Office of Sponsored Research*

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*Assistant Director of Financial Reporting  
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### Contracts and Grants Question and Answer Session

#### Budgetary Questions for Grants:

- 1) Are all grant budgets loaded into Infoporte for grants existing prior to implementation?  
*Yes.*
- 2) Can the budget process be explained so managers have a better understanding of what to expect as new projects are funded?  
*OSR has staff that are loading budgets into ConnectCarolina and related systems. They are the same staff members who were loading budgets into FRS. The process has not changed as it pertains to RAMSeS, however the process does require more time or clicks than it did before.*
- 3) How do you view budgets in Infoporte? For example, multiple fiscal years must be checked in order to see the total amount awarded. What is the best way to see available funding on a project?  
*All grants are loaded into Infoporte. This is not just the budget for the month, but for the whole period of time selected. The information should look better than it did before. Just make sure all fiscal years that are needed are checked.*
- 4) Why is IDC being included in the total funded amount? Can this be broken out to show the accurate available balance?  
*IDC is included in the total because it fluctuates based on expenses. In the current view of Infoporte you must subtract the IDC from the total in order to determine the available spending balance. Overhead distribution is controlled by the Provost's budget committee rather than OSR. OSR simply collects the overhead. It is up to individual departments to determine F&A sharing among PIs.*

General Questions:

- 1) How is OSR planning to accommodate the additional workload with budget revisions?

*OSR is currently in the process of building out metrics to measure turnaround times, the process, and where requests are while in process. This will add a needed level of transparency regarding the processes. Once they have collected these metrics and analyzed them they will determine if and where additional staffing is needed.*

- 2) Is OSR considering restructuring post award or any other areas? Where can we find contact lists and/or organizational charts for the specific areas within OSR?

*No restructuring at the moment.*

*Contact list for specific areas may be found here:*

*<http://research.unc.edu/offices/sponsored-research/about/staff/>.*

*An organizational chart may be accessed here:*

*<http://research.unc.edu/files/2014/09/avcresearch.pdf>.*

- 3) There had been discussion of modifying the NOTR process - When completing the NOTR template, what should we put as the "date of FBM" used?

*Until further guidance is available, please use the last day of the month.*

- 4) With campus learning the new system, what types of turnaround times should we expect for: award setup, budget revisions, extending dates for NCE, etc.

*OSR is currently in the process of building out metrics to measure turnaround times, the process, and where requests are while in process. This will add a needed level of transparency regarding the processes.*

- 5) Where can we find who the financial reporter is for a given project now that FRS is being phased out? One department manager was instructed to look on the Billing Tab – is this tab available to campus or only OSR personnel?

*The billing tab in RAMSeS is currently only available to OSR staff and they are reviewing the possibility of making this tab available to the College managers. [Click here to determine which financial reporting team supports the sponsor of your award](#). After you determine which team is supporting your award, you may contact the team lead.*