Quick Tips for Your Grant

From Southeastern's Office of Sponsored Research and Programs (OSRP)

Congratulations on your award! In addition to conducting your funded project, you have the responsibility of serving as administrator of your award, which may include being the Budget Unit Head. As administrator, you also are responsible for compliance and are required to follow agency and university guidelines for all project-related activities and expenditures. Please familiarize yourself with agency guidelines and review award documents for any specific regulations required. The following are quick tips to assist you with Southeastern Louisiana University's procedures.

◆ **TIP 1:** Secure full PeopleSoft (PS) Financials access to monitor all budget activity and to submit Purchase Requisitions and Travel Authorizations. To get **full PS Financials** access, review all training materials on the PS Financials site (http://www.selu.edu/leonet/financials/getting_started/index.html), complete the online assessment, print the assessment certificate, and submit to the Office of Assistant VP of Finance (Box 10725 or fax to 985-549-3315). Information regarding Travel can be found at http://www.selu.edu/admin/controller/facultystaff/travel/index.html. Contact the Travel Desk (985-549-2089) for training or assistance in specific travel procedures.

◆ **TIP 2:** Submit purchases greater than $1,000 through PS Financials Purchasing-Requisitions. As Budget Unit Head, you can apply for a Procurement Card (**P-Card)** for purchases costing less than $1,000 by submitting the Enrollment Form (http://www.selu.edu/admin/purch/procurement_card/forms/index.html) and completing in-person training. Policies and procedures for Southeastern's P-Card program can be found at http://www.selu.edu/admin/purch/procurement_card/index.html.

   NOTE: Only those items approved by the funding agency can be purchased. Follow University guidelines for receipt and documentation of all purchases. All **technology purchases** (such as laptops, netbooks, i-Pads/tablets, i-Pods, etc.) must be approved by Computer Resales **prior** to purchase. *Technology items require University tagging, even if the value is less than $1,000.*

◆ **TIP 3:** Use the **Process Form for Payment** (found at http://www.selu.edu/admin/purch/forms/) for purchases up to $1,000 that are not allowable purchases using the P-Card. Examples of payments made using this form are for memberships, telephone charges, and stipends. Support documents must accompany the form, and the form must be signed by OSRP if payment is charged to an externally-funded budget.

◆ **TIP 4:** Submit all **Budget Adjustment Request Forms** to OSRP for approval **prior** to submitting to Grants Accounting. Budget adjustments for externally-funded projects cannot be submitted on-line. Forms are available on the Budget Office web page.

(http://www.selu.edu/admin/budget/budget_adjustment_forms/index.html) When preparing changes to budget categories, if prior agency approval is required, contact the OSRP to obtain permission from the agency.

◆ **TIP 5:** Position descriptions and the hiring of any new personnel (including Graduate Assistants) with external funds must be completed through Southeastern's PeopleAdmin System. Contact Human Resources to obtain user access. A Hiring Manager's User's Guide can be found at http://www.selu.edu/admin/hr/documents/hrmanagersguide.pdf. Forms for supplemental pay (5.01S) for faculty/staff and additional duties for Graduate Assistants can be found at http://www.selu.edu/admin/hr/forms/employment_forms.html. All electronic/paper documentation must be completed **prior** to any work being performed.

◆ **TIP 6:** If your project involves a **Cash Match, In-Kind Match** or **Third-Party Match**, carefully document this information using the personnel, space, and donations forms found on the ORSP web page. (http://www.selu.edu/admin/osrp/osrp_forms/index.html) Because match is often reported to funding agencies as part of invoicing, provide all matching information to Grants Accounting monthly with original signatures and support materials.

◆ **TIP 7:** Confirm that all IRB/IACUC approvals (or exemptions) are in place prior to beginning any research.

◆ **TIP 8:** Contact the OSRP to coordinate communication with the funding agency regarding special budget adjustments, extension requests, change in scope of project, etc.

◆ **TIP 9:** Complete and submit copies of all interim and final **project** reports to OSRP. All **financial** reports will be prepared by the Controller's Office.

◆ **TIP 10:** Maintain project records in accordance with the award guidelines or for a minimum period of three (3) years after the completion of the project.

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Carefully monitor your budget throughout the award period. As you administer the funds of your project, keep your goals/objectives and budget in mind. Rushing to spend money at the very end – or worse yet, not spending money -- may indicate to the funding agency that you did not accomplish your goals/objectives. Be a good manager – spend your money wisely and timely.

Additional links, information and resources can be found on the Sponsored Research and Programs web site -
http://www.selu.edu/admin/osrp/index.html.