

CLASP Tips and Tricks – Sponsored Research Management

Made Easier Through Common Sense

Tips

1. Review Award's and GR's when notified by ORPA, we need the "Three Headed Monster" (ORPA/ORACS/DEPT) to ensure accuracy at the start of an Award.
2. URFInancials is the University System of Record when it comes to Financial data. Please do not refer to URGEMS when closing out an Award/Grant(s). "But GEMS has a different number....."
3. Subcontracts w/unique GR – amount on Award Line is total of subcontracted amount PLUS any indirect UR will apply (\$13,500 under an MTDC Federal Award, or 54% of \$25,000).
4. Journal Entry Basics:
 - a. Provide a justification for all cost transfers. Why did the charge(s) post to the original FAO and why are they now being moved? Affirm they are allowable – allocable - reasonable to the FAO(s) they are moving to.
 - b. Check budget dates and spend categories to make sure they are accurate and make sense.
 - c. Attach support that "tells the story of the AJE" and supports the journal lines. A copy of the original transaction (URF transaction report) is necessary for cost transfers so AJE reviewers can affirm charge(s) are moving from where they originally posted.
5. Copy / paste (text). This helps eliminate typos.
6. Searching for.....(use words like create, find, view, ex. "create journal", "view spend category").
7. When notified of a terminating Award, please proactively run cumsums for the project GR(s) and determine who is being charged to those GR(s) and prepare payroll forms to remove those individuals on the end date of the GR(s). This normally affords a Dept at least 15 days to enact such changes. If those are not captured and recorded in HRMS in 15 days then Retro Forms (800 Forms) will be required, along with prospective 600/610 Forms, etc.

Be proactive, not reactive, it will save you ½ the work effort.

Tricks

1. Utilize "Saved Reports", adding new AWD's/GR's each month and removing new inactives.

2. Start your monthly/quarterly review at the highest level. Prepare the URF0391 (NCL) first. Then generate the transaction detail report. This will allow you as a reviewer to focus on errors, misapplied transactions etc.
3. Review payments from Sponsors on Awards QUARTERLY, at a minimum. URF1027
4. Searching for FAIN – AWD – GR – PO (Pass Through) numbers. Naming conventions matter!!
5. Save time and energy by using the “copy” feature for recurring AJE’s. Type AJE Ref. # in search box, click 3 dots (ellipsis) next to magnifying glass, select “journal”, select “copy”. Be mindful of budget dates when using this feature – they default to the accounting date.

