OFFICE OF THE CONTROLLER

Grants Administration Payroll Accounting Training

February 2024





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Account Funding Change eForm



Updating Payroll Expenses Using the Account Change eForm

Submit Account Change eForms, ensure charges begin and end appropriately

• Will need to be updated for next year of funding if its set-up on another project

To be compliant with Uniform Guidance, errors should be identified and corrected in a timely manner (**within 90 days**)

• Be sure to review frequently vs. the end of the grant - otherwise expense may have to be covered by E or A fund.

Making timely and correct payroll accounting changes:

- strengthens internal controls
- provides for more accurate time and effort reporting
- accurate sponsor invoicing
- assists with grant close out and final reporting



Account Funding Change eForm

- The Account Change eForm is used to update/correct payroll accounting expenses in a timely matter.
- The eForm can be found in PeopleSoft HCM, hcm.ps.sc.edu.

Use the following navigation:

Employee Self Service – My Homepage/My Workplace – ePAF Homepage



Timely Submission of Account Funding Change eForms

- You can make funding changes up until the day after the previous pay date as outlined on the <u>Payroll</u> <u>Schedule for Lag Employees</u>.
- Submitting eForms timely reduces the number of retro funding changes needed for lag employees.

Payroll Period	Checks Distributed	Current End Date	Lag & Hourly End Date	Actions due to HR	Actions due from HR to Payroll
January 15, 2023	1/13/2023	1/15/2023	12/31/2022	Refer to HR website	1/5/2023, 5 p.m.
January 31, 2023	1/31/2023	1/31/2023	1/15/2023	Refer to HR website	1/23/2023, 5 p.m.
February 15, 2023	2/15/2023	2/15/2023	1/31/2023	Refer to HR website	2/7/2023, 5 p.m.
February 28, 2023	2/28/2023	2/28/2023	2/15/2023	o HR ne	2/20/2023, 5 p.m.
March 15, 2023	3/15/2023	3/15/2023	ding Charles (the dial by 4/16/24 (the dial by 4/16/24)	ay Me). Cosite	3/7/2023, 5 p.m.
March 31, 2023	3/31/20 SU	bmit Ace payron or 4/31/24 payron	payroll P	Refer to HR website	3/23/2023, 5 p.m.
April 15, 2023	4	after 572023	3/31/2023	Refer to HR website	4/6/2023, 5 p.m.
April 30, 2023	4/28/2023	4/30/2023	4/15/2023	Refer to HR website	4/20/2023, 5 p.m.

Example: To ensure a funding change for the 7/31/23 paycheck, the eForm must be submitted by 7/16/23.





Demonstration

• Completing an Account Funding Change eForm in PeopleSoft HCM.



Account Change eForm Key Take-Aways

- Some employees may have more than one record return, indicating they have a primary and secondary job here at the university. Be sure to click the **Related Action Menu** button on the job requiring the account funding change.
- The **Pay Period Effective Date Lookup** will only show the current Payroll and future dated Payrolls. If you attempt to enter a date for a past Payroll(s) you will receive an error message.
- Always double-check the Chartstring information populated in the New Distribution section. Specifically, ensure there is a Combination Code at the end of the chartstring. This indicates the string is valid.



Payroll Retro Funding Change and Cost Transfer Forms



Payroll Retro Funding Change Form

- Used to adjust or correct items originally processed in Payroll/HCM system.
- All requests must include back-up that shows where the salary expense was originally charged.
- The Cost Transfer Justification Form must be included for all requests including the USCSP PC Business Unit.
- If moving payroll for more than one check date, they must be broken out separately.



Payroll Retro Funding Change Form

		versity of UTH CAR	OLINA		PAYROLI	RETRO FUNDING	CHANGE						
					ТО ВЕ СОМ	PLETED BY THE DE	PARTMENT						
	USC ID:				NAME (Last	First):			PAY GROUP:				
JUSTIFICATION/NOTES (Cost Transfer Justification Form must be completed and attached if a USCSP project is part of the transaction):													
										_			
PAYCHECK DATE: Has this paycheck date previously been moved via a Retro Funding Change Journal Entry? YES NO													
CURRENT DISTRIBUTION													
	OPER UNIT	DEPT	FUND	ACCOUNT	CLASS	BUSINESS UNIT	PROJECT #	COST SHARE	COMBO CODE	AMOUNT			
								+4					
						ļ	ļ	ļ					
	I					1		TOTAL R	TRO FUNDING CHANGE	\$ 0.00			
										φ 0.00			
ī						SIGNATURES			-				
Ī	Initiated by:			Date:		Approved	i by:		Date:				
Ī	Printed Name:					Printed N	lame:						
t					CONTRO	LLER'S OFFFICE U	SEONLY						
	Grants & Funds I	Management :				Date:							

- Please make sure you are using the current form.
- Use the original paycheck date.
- Be sure to enter the <u>correct</u> funding chart strings and corresponding combo codes.



Cost Transfer

The following three prerequisites are considered when determining if a a cost transfer may be allowable:

- The cost transfer must provide a direct benefit to the Sponsored Project being charged.
- The cost transfer must comply with both the University's policies and sponsor's terms and conditions.
- The cost transfer must be fully documented.

Other factors, such as timing may affect allowability.



Cost Transfer – Allowable Examples

The following is a list of examples that illustrate circumstances in which a cost transfer may be allowable:

- The cost transfer will occur within 90 days of original expense.
- To reallocate effort based on actual effort expended.
- To move pre-award costs to the appropriate project in accordance with Uniform Guidance.
- To correctly allocate costs benefiting more than one project.
- To remove unallowable charges.
- To remove out-of-period charges.



Cost Transfer – Not Allowable Examples

Certain cost transfers onto sponsored awards <u>are not</u> allowable under any circumstances.

Such as:

- To correct deficiencies caused by overruns or other funding considerations.
- To avoid restrictions imposed by the law or by terms of the Sponsored Project.
- To "park" expenses which will subsequently be transferred elsewhere, including to competing or non-competing continuations of the same project for which the notice of award or new project has not been received.
- To transfer costs (spending-down) to a sponsored project merely because there are unexpended funds available which would otherwise be returnable to the sponsor.



Cost Transfer Justification Fo

PURPOSE

This justification form will help ensure compliance with Uniform Guidance along with University policy regarding cost transfers. In the event of an audit, the information provided below will be used to substantiate the adjustment. This form is required for any cost transfers that adjust expenditures involving sponsored project accounts (the USCSP Business Unit). Principal Investigator (PI) certification and approval is required for all cost transfer requests. Once completed, this form needs to be attached with required supporting documentation to the proper request (Payroll Retro, Expense Module Correction Form, JV eform, etc.). If this form is not included, the request will not be completed.

(Faytor Redo, expense module correction rorm, av elorm, etc.). If this form is not included, the request with for the completed.	
COST TRANSFER TYPE	
Payroll Retro Funding Change Request Expense Module (payment with pcard) JV (payment through check/voucher) Other	
Original (incorrect) chartfield *:	
Correct chartfield *:	
* For payroll retro forms, "see retro form" may be listed if multiple projects/funds are involved in the request	
JUSTIFICATION	
 Please specify the transaction(s) being moved and how it directly benefits the sponsored project it is being moved to, if this is being moved to a USCSP account. 	1
How was this error or situation discovered? Please include the reason this was originally charged to the incorrect sponsored project or account.	
3. How will this type of error or situation be prevented from happening in the future?	_
CERTIFICATION	

As PI, I approve this expense to be adjusted according to the fund(s)/project(s) listed above. I certify this expense is in accordance with the award budget as well as allocable and necessary for accomplishing the scope of work.

	PI Signature:	Date:	**PI Signature:	Date:					
	Printed Name:		**Printed Name:						
** If adjustment impacts more than one PI									

Cost Transfer Justification Form

- A cost transfer should be processed within 90 days following the end of the month in which the original charge was initially recorded.
- **Required** if moving expenses on or off a sponsored award.
- Be sure to answer all three questions.
- PI must sign the form.
- Form can be found on the Controller's Office website.



Payroll Retro Funding Change Process

- The Controller's Office reviews forms received.
- If approved, a JE will be uploaded and post to the GL with an RPAYxxxxx journal entry.
- Expect **3-5 business days** before you can view the change in HCM Distribution.
- Will show as pink lines within HCM Distribution once posted.

1920-7 : RPAY000042	UG82	C12	06/30/2019	RPAY000042	01/10/2020	A00000034158	MC000-180000- F1000-301-10009070-	(2,063.66)	-21.87%	(155.55)	(297.73) (0.0	2) (0.24)	(61.04)	(1.04)	(515.62) 24.99%	(2,579.28)
1920-1 : PAY0081351	UG82	C12	07/15/2019	8000080700	07/15/2019	A00000034158	MC000-180000- F1000-301-10009070-	(619.11)	-6.56%	(46.69)	(135.02) (0.0	2) (0.11)	(26.16)	(0.43)	(208.43) 33.67%	(827.54)
1920-7 : RPAY000042	UG82	C12	07/15/2019	RPAY000042	01/10/2020	A00000034158	MC000-180000- F1000-301-10009070-	2,063.66	21.87%	155.56	450.09 0.0)3 0.36	87.21	1.47	694.72 33.66%	2,758.38

 Please remember to submit any corrections for USCSP within 90 days of the pay date otherwise the charges will not be allowed to transfer to another grant and will be moved to a departmental account.





Demonstration

• Completing a Payroll Retro Funding Change and a Cost Transfer Justification Form.



Tracking USCSP Funding End Dates



How can Identify Employees Needing Funding Changes?

For USCSP projects, those on the project team (business manager and principal investigator) are sent system-generated **notices 90 days and 30 days before a project ends**.

There are two queries available to help identify all grant funding sources and end dates to help track expiring or inactive grants. You can run these before each payroll, allowing sufficient time to take corrective measure when a grant has expired or is inactive.

The queries are:

- SC_PY_FUND_BYPROJ_DATE
- SC_PY_FUNDING _BYPROJ

To access these queries, navigate to **Main Menu > Reporting Tools > Query > Query Viewer** in <u>HCM</u> <u>**PeopleSoft**</u> and enter the query name, listed above, in the Query Name field.



Navigation: Main Menu > Reporting Tools > Query > Query Viewer

Role: Business Manager Query Reports and Finance Initiator

Query Name: SC_PY_FUND_BYPROJ_DATE

Description: Project Funding Query BY DATE

	Project			
Fiscal Year	(required) 20	023		
PC Bus Unit	(required) US	CSP 🔍		
Eunding Er	d Date <= 03/	31/2024 🔄		

Row	Name	First Name	Last	ID	Empl Record	Job Eff Date	Sequence Dept ID	Position	Pay Status	Action	Group	Туре	Empl Class	Planned Exit	Auto End Job	Year	Eff Date	Sequence	Earn Code	Seq Nbr	Combo Code	Project	PC Bus Unit	Funding End Date	Distributed
1					1 (01/08/2024	0 155901		А	REH	112	s	STU	05/15/2024	Y	2023 0	5/16/2023	0		1	A0000052745	10009478	USCSP	03/31/2024	Y
2					0 0	08/29/2023	1 112000		Α	DTA	C12	s	FTE	06/30/2026	N	2023 0	4/16/2023	0		1	A0000086168	10012034	USCSP	06/30/2023	Y
3					0 1	10/01/2023	0 100025		Α	DTA	P12	s	RGP	09/30/2028	Y	2023 1	2/16/2022	0		1	A0000000466	10008839	USCSP	09/29/2023	Y
4					1 (01/01/2024	1 155301		A	DTA	112	s	STU	05/15/2024	Y	2023 0	5/16/2023	0		1	A0000082179	10011763	USCSP	08/15/2023	Y
5					1 (08/16/2023	2 135700		Α	DTA	T12	s	STU	05/15/2024	Y	2023 0	8/16/2022	0		1	A0000051825	10009426	USCSP	07/31/2023	Y
6					0 0	01/02/2024	0 159000		Α	PAY	P12	s	RGP	01/31/2025	Y	2023 0	6/13/2023	0		1	A0000061883	10010152	USCSP	02/28/2024	Y
7					0 1	12/01/2023	0 115011		Α	HIR	P12	s	RGP	11/30/2024	Y	2023 0	5/01/2023	0		1	A0000093376	10012660	USCSP	10/31/2023	Y
8					2 (09/01/2023	0 115300		A	REH	HRL	н	TSF	08/15/2024	Y	2023 1	2/16/2022	0		1	A0000088435	10012229	USCSP	07/31/2023	Y
9					0 0	06/16/2023	0 155301		Α	PAY	P09	s	FTE		N	2023 0	3/16/2023	0		1	A0000082152	10011763	USCSP	08/15/2023	Y
10					0 0	07/01/2023	0 181900		Α	PAY	C12	s	RGP	06/30/2025	Y	2023 0	6/16/2023	0		1	A0000086795	10012084	USCSP	06/30/2023	Y
11					0 0	07/01/2023	0 181900		Α	PAY	C12	s	RGP	06/30/2025	Y	2023 0	6/16/2023	0		1	A0000086798	10012085	USCSP	06/30/2023	Y
12					0 0	07/01/2023	0 181900		A	PAY	C12	S	RGP	06/30/2025	Y	2023 0	6/16/2023	0		1	A0000088319	10012217	USCSP	06/30/2023	Y
13					0 0	07/01/2023	0 181900		А	PAY	C12	s	RGP	06/30/2025	Y	2023 0	6/16/2023	0		1	A0000088456	10012222	USCSP	06/30/2023	Y
14					0 0	07/01/2023	0 181900		A	PAY	C12	S	RGP	06/30/2025	Y	2023 0	6/16/2023	0		1	A0000089702	10012360	USCSP	06/30/2023	Y
15					0 0	07/01/2023	0 181900		Α	PAY	C12	s	RGP	06/30/2025	Y	2023 0	6/16/2023	0		1	A0000093553	10012678	USCSP	12/31/2023	Y
16					0 0	07/06/2023	0 115011		Α	DTA	P12	s	RGP	08/15/2024	Y	2023 0	6/16/2023	0		1	A00000091023	10012497	USCSP	09/30/2023	Y
17					0 0	07/06/2023	0 115011		Α	DTA	P12	s	RGP	08/15/2024	Y	2023 0	6/16/2023	0		1	A0000093376	10012660	USCSP	10/31/2023	Y
18					0 0	07/06/2023	0 115011		Α	DTA	P12	s	RGP	08/15/2024	Y	2023 0	6/16/2023	0		1	A0000097696	10012851	USCSP	02/28/2024	Y
19					0 0	08/16/2023	3 159000		Α	DTA	C09	s	FTE		N	2023 0	2/01/2023	0		1	A0000093020	10012628	USCSP	12/31/2023	Y
20					0 1	10/01/2023	0 152200		A	PAY	P12	s	RGP	09/30/2024	Y	2023 1	1/01/2022	0		1	A00000091455	10012238	USCSP	09/30/2023	Y
21					1 (08/28/2023	0 159000		A	POS	P12	s	RGP	12/31/2024	Y	2023 0	4/01/2023	0		1	A0000093047	10012628	USCSP	12/31/2023	Y
22					1 (07/01/2023	0 185000		Α	PAY	P12	s	RGP	12/31/2025	Y	2023 0	7/01/2022	1		1	A0000082576	10011789	USCSP	06/30/2023	Y
23					0 0	07/01/2023	0 135800		Α	PAY	P12	s	RGP	12/31/2024	Y	2023 0	5/16/2023	0		1	A00000097254	10012813	USCSP	03/31/2024	Y
24					0 0	07/01/2023	0 135800		A	PAY	P12	s	RGP	12/31/2024	Y	2023 0	5/16/2023	0		1	A00000097265	10012810	USCSP	03/31/2024	Y
25					2 (02/01/2024	0 115016		А	DTA	P12	s	RGP	02/28/2025	Y	2023 0	6/16/2023	0		1	A0000069504	10010772	USCSP	06/30/2023	Y

Employees Paid on a Lag

For **employees paid on a lag**, the expense will be allowed to post to the project if the wages were <u>earned</u> during the project period. For example:

 A project has an end date of 1/31/24 – employees paid current will only be allowed to post earnings to the project through the 1/31/24 payroll, but lag employees will be allowed to post earnings to the project through the 2/15/24 payroll.



New Year of Funding Expected

If you are expecting a new year of funding for an award:

- Request a risk account from the SAM Office.
- No-cost extensions or risk accounts need to be requested 60-90 days in advance of the project ending in order to get approved and set up on time.
- If they are not requested and set up on time, you will need to move these employees to your department's A or E funds.





Demonstration

• Identify grant funding sources and end dates using queries in PeopleSoft HCM.



Resources & Contacts





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Office of the Controller

General Accounting Grant Administration of Sponsored Awards supports academic and administrative business units to include personnel management, fiscal operations, and coordination with multiple governing areas to ensure compliance with Uniform Guidance and grant awards. Compliance and Tax Management Understands and executes the various stages of the grant lifecycle including pre-award review, grant progress monitoring, and award closure in coordination with the Principal Investigators. Payroll Department Below is a list of Grant Administration tasks you may be responsible for within your college/department. Sections include links to training resources that support each task. Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BiZMANAGER listery end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below. Ponices & Procedures Cost Share PopleSoft Finance Training Schedule Cost Share Posletters Cost Share Posletters Cost Share Posletters Cost Stangement Itsterves Indirect Cost (IDC) Itsterves (Hildican to Grants Management) Posletters (Hildican to Grants Management) Posletters (Hildican to Grants Management) Posletters (Hildican to Grants Manage	Office of the Controller	Grant Administration							
Grants and Funds units to include personnel management, fiscal operations, and coordination with multiple Management governing areas to ensure compliance with Uniform Guidance and grant awards. Compliance and Tax understands and executes the various stages of the grant lifecycle including pre-award Payroll Department investigators. Operational Management and Reporting Below is a list of Grant Administration tasks you may be responsible for within your college/department. Sections include links to training resources that support each task. Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below. Grant Administration • Principal Investigator • Policies & Procedures Cost Share • Cost Transfers • • Indirect Cost (IDC) • • Ustservs Indirect Cost (IDC) • Ustservs Indirect Cost Management • Grant Administrations • • Principal Investigator • • Policies & Proce	General Accounting	Grant Administration of Sponsored Awards supports academic and administrative	business						
Compliance and Tax Understands and executes the various stages of the grant lifecycle including pre-award Payroil Department Investigators. Operational Management and Reporting External Financial Reporting Below is a list of Grant Administration tasks you may be responsible for within your college/department. Sections include links to training resources that support each task. Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below. Cant Administration Account Funding Change Cost Out Matrix Cost Share Indirect Cost (IDC) Introduction to Grants Management Milestone Notifications 	Grants and Funds Management	units to include personnel management, fiscal operations, and coordination with multiple governing areas to ensure compliance with Uniform Guidance and grant awards.							
Payroll Department investigators. Operational Management and Reporting Below is a list of Grant Administration tasks you may be responsible for within your college/department. Sections include links to training resources that support each task. External Financial Reporting and Transparency Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below. Business Manager Grant Administration Principal linvestigator Cose Out Matrix Cost Share Cost Share Cost Transfers Indirect Cost (IDC) Introduction to Grants Management Milestone Notifications Milestone Notifications Monitoring Awards Monitoring Awards 	Compliance and Tax Management	Understands and executes the various stages of the grant lifecycle including pre-arreview, grant progress monitoring, and award closure in coordination with the Prir	ward Icipal						
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PeopleSoft Finance Training Schedule Indirect Cost (IDC) (+) Listservs Introduction to Grants Management (+) Social Media Milestone Notifications (+) Contact Us Monitoring Awards (+)	Newsletters	Cost Transfers	(+)						
ListservsIntroduction to Grants Management(+)Social MediaMilestone Notifications(+)Contact UsMonitoring Awards(+)	PeopleSoft Finance Training Schedule	Indirect Cost (IDC)	•						
Social MediaMilestone NotificationsContact UsMonitoring Awards	Listservs	Introduction to Grants Management	+						
Contact Us Monitoring Awards (+	Social Media	Milestone Notifications	+						
	Contact Us	Monitoring Awards	•						

Where to Find Resources

For a list of Grant Administration tasks, you may be responsible for within your college/department, visit our <u>Grant Administration</u> page.





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Office of the Controller

Office of the Controller	Principal Investigator						
General Accounting	A Principal Investigator or PI is the individual responsible for the preparation	on, conduct, and					
Grants and Funds Management	administration of a research grant.						
Compliance and Tax Management	Below is a list of tasks a Principal Investigator may be responsible for as the administrator of Sections include links to training resources that support each task.	a research grant.					
Payroll Department	Note: Each year the Controller's Office provides refresher trainings starting the month of Feb	ruary thru the end of					
Operational Management and Reporting	April. Registration links for all scheduled trainings are sent to our PROJECTPI listserv end of January and in a prior week reminder email. On demand training can be found in the sections below.						
External Financial Reporting and Transparency	Close Out Matrix	Expand all					
Resource and Training Toolbox	Cost Share	•					
Business Manager	Cost Transfers	(+)					
Grant Administration	Introduction to Grant Management	•					
Principal Investigator	Milestone Notifications	+					
Policies & Procedures	Monitoring Awards	•					
Forms	No Cost Extensions	•					
Newsletters	Procurement	(+)					
PeopleSoft Finance Training Schedule	Project Team	•					
Listservs	Retro Funding Change	+					
Social Media	Risk Accounts						
Contact Us	Salary Allocations						
	- Sponsored Award Roles and Responsibilities	````````````````````````````````					
	Subrecipients						
	Time and Effort Reporting	•					
	Workflow	•					

Where to Find Resources

For a list of tasks, a Principal Investigator may be responsible for as the administrator of a research grant, visit our <u>Principal</u> <u>Investigator</u> page.



Contacts

10012779 Next-Generation Ammonia System In	tegration Utilizi	University at Bu	ıffalo, SUNY	CON0006798 R1344198 DE	-AR0001479	07/25/2022-07/24/2024 [23.9 months]
Operating Unit	Department		Fund		Class	
CL040 ENGINEERING - COMPUTING	155100 CHEMICAL ENGINEER	ING RESEARCH	F1000 FEDERAL C	GRANT	202 INDIVIE	DUAL AND PROJECT RSRCH
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If you have any questions regarding expenses or invoicing, please contact your Grant Administrator (**APPRV_1**).



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Questions



THANK YOU!

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Alone, we can do so little; together, we can do so much.

