OGC Team Talks April 2017

Introduction to PeopleSoft Grants 9.2
AGENDA

- InfoEd to PeopleSoft Award integration
- Master–Child proposals
- Basic PeopleSoft grant navigation and attributes
- Demo
- Questions?
- Next sessions in the Grants Team Talks series
InfoEd Proposal to PeopleSoft Award

InfoEd Master Awarded Proposal (1st year award or New Federal Segment)

InfoEd Child Awarded Proposal (Amendments, modifications, continuations)

PeopleSoft Proposals
- Must be in PS proposal in Year 1 to become PS Award

New Award/Award Mods
- PI, Sponsor, Terms, Award Actions

Project(s)
- Department, Location, Project Team, F&A Rates

Contract
- Contract Lines(s), Product Type(s)

Billing Plans
- Billing or Payment Terms, Billing Limits

Revenue Plans
- Method for recognizing revenue
Master/Child InfoEd Proposal to PeopleSoft Award

- All proposals in InfoEd are Master proposals until they are designated to be a Child.
  - No change for departments – route as today.

- Master proposal number in InfoEd becomes Award Number in PeopleSoft – *(NEW)*
  - *Note, this differs from the sponsor assigned award number, those numbers are stored in Sponsor Reference Award number field.*
Only OGC Award Setup will make proposals a child proposal.

- Only awarded proposals that are amendments, modifications, or continuations to existing awards will be designated as child proposals.

- For Federal new segment results in a new PeopleSoft award.
PeopleSoft Navigation to Awards

- You can search by a variety of ways.
*Note award is master proposal/award not sponsor number.
- Once you are in the Award, from there you can navigate through tabs and links.
- There are links to get to project and contract
Main Award Tab
Projects listed under Awards

- Projects existing before conversion are 1 to 1 award/project.
- Awards created after conversion can contain multiple projects for multiple budget years under one award.
Project Links

You will see all projects listed here that are associated with the award.

<table>
<thead>
<tr>
<th>Associated Project</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC Business Unit</td>
<td>Project Description</td>
</tr>
<tr>
<td>UCD</td>
<td>25A5006</td>
</tr>
<tr>
<td></td>
<td>ACS CONTR CENTRO DUPLIC</td>
</tr>
</tbody>
</table>

Link within Project to Project Team
Project Teams

- PI = Principal investigator on award notice.
- CO–PI
- GADM = Department Admin (project fiscal manager)
- GACT = Post Award Accountant
- Fiscal Staff – still on ST (no changes)

Need Updates? Send to -- OGC.Fiscalroles@ucdenver.edu
Project Activities

- **New** – multiple rates tracked (located under Project Activities, FA Rates Tab)

- Institutional predefined rate = University rate

- Funded rate = rate awarded

- Difference is “waived F&A”
Project Activities

- Funded rate = rate calculated on your award
Contract Module

- Contract is where Revenue and Billing processes/information are setup
- Award number = Contract number
- Contract stores LOC information such as Document number and Subaccount numbers
- Future Team Talks discuss contract/billing in more detail
Contract Types

- Contract types are used in run controls for many billing processes and are used as a management tool for checking correct setup data.

- Contract types
  - CR – Cost reimbursable awards
  - LC – Letter of Credit awards
  - IB – Installment Based awards
  - FR – Fixed Rate agreements
Contract Product Types

- Product Types – define how Revenue is calculated. *(NEW)*
  - **Grant_Reimburse** – Revenue is based on expenses charged to the project. (same as 8.4)
  - **Grant_Fixed** – Revenue is based on payments received and not based on charges to project. *(NEW)*
    - For awards that are paid per something (patient, test, etc....) or paid when certain milestones are met.
Contract Billing Methods

- Billing methods – define if bills are created based on expenses or some other value

- All projects have billing in system – even if actual invoice is not sent out

- Types include –
  - As Incurred – Billing is based on expenses incurred during the billing period
Contract Billing Methods

Types Cont…

- **Value Based** – Billing is based on a predefined billing schedule that is time based – e.g. sponsor pays each month, quarter or year for a predefined amount, regardless of expenses.

- **Milestone** – based on meeting a milestone –
  - Patients enrolled
  - Tests performed
  - Goal achieved/product delivered
    (not based on expenses)
# Contract Bill Types

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>201</td>
<td>UCD Fed LOC Pooled</td>
</tr>
<tr>
<td>202</td>
<td>UCD Fed LOC Detailed Subaccount</td>
</tr>
<tr>
<td>2AX</td>
<td>UCD Annual Billing</td>
</tr>
<tr>
<td>2SX</td>
<td>UCD Semi Annual Billing</td>
</tr>
<tr>
<td>2QX</td>
<td>UCD Quarterly Billing</td>
</tr>
<tr>
<td>2MX</td>
<td>UCD Monthly Billing</td>
</tr>
<tr>
<td>2CT</td>
<td>UCD Rate Based Billing (FIXED RATE OR PRICE) *These are in most instances department billed</td>
</tr>
<tr>
<td>2IN</td>
<td>UCD Installment Billed</td>
</tr>
<tr>
<td>2DB</td>
<td>UCD Legacy Department Billed (Converted Projects only not use in new setups)</td>
</tr>
<tr>
<td>2GR</td>
<td>UCD Grants Billing (Conversion cleanup only not used in new setups)</td>
</tr>
<tr>
<td>2PI</td>
<td>UCD Program Income (Not used in new setups, program income is not billed in system)</td>
</tr>
</tbody>
</table>

Replaces old AR type on Mfin report header
*Note right now almost all showing as 2GR Carl is working on fix to display correct value.
Live Navigation Demo

- Grant with Multiple Years/and or Multiple Projects
- Clinical Trial Award
- Converted Award/Project
  - Award/Contract number = Project#CONV
  - Ex: 2512345CONV
New Award Notification Emails Coming Soon!

- Notice will contain terms and values discussed throughout presentation.
- Automated Notification to all individuals with roles on Project Team and ST Fiscal Staff.
Future Sessions

- Contracts Module Details
  - Revenue recognition and billing limits
  - Project costing transactions and GL

- Billing
  - Understanding billing and how to obtain billing information via pre designed queries

- Accounts Receivable
  - How to review payments received