

Expectations of the Physics Department's Senior Grants & Contracts Manager

With the addition of Lori Arnold to the Physics Department Administrative staff as the Senior Grants and Contracts Post Award Manager, there have been some changes made to the work flow and duties of some of our other administrative staff. Please see below for a summary of the services that Lori now intends to provide. Note that most of these are effective immediately while a few will be phased in gradually.

1. Act as part of the department's fiscal administrative staff

- Provide approvals for purchasing and travel requests using OSP funding and also to confirm allow-ability based on department, OSP and sponsor policies and guidelines.
- Approve and coordinate personnel funding changes on OSP projects through the HR system.
- Coordinate any expense transfers needed on the projects with the dept. admin. associate and approve those in the system to be posted to the projects.
- **Approve** PA-005s on behalf of the department.
- Notify and assist PI when effort certification deadlines are approaching to interpret effort reports for accuracy if necessary.

2. Provide a periodic financial reconciliation of your externally awarded funding administered through OSP, updating these on at least a quarterly basis and share them with PI and admin. associates (if requested) in a Buckeye Box folder.

- Compile all relevant information into a comprehensive summary spreadsheet that will show the projected unobligated balances available for each project including comments/analysis, a summary of all personnel appointments on the projects, a worksheet for each project that shows the budget awarded, expenses to date, outstanding commitments (those shown on the PI Portal plus those not shown on the Portal such as travel, tuition, internal and/or re-occurring charges, burn rates if applicable) arriving at a projected balance available to spend or indicating anticipated deficits.
- Create an annual effort review for the PI, planning for ODP, release time requests, and cost shared effort making sure any sponsor's effort requirements are met. Track "banked" release time to ensure the transfer ultimately gets made into PI's department fund.
- Communicate any anticipated overrun issues with the PI and the department if necessary so everyone knows what to expect and we can work together to find a resolution.

3. To act as the point of contact between the PI and department and OSP for any post-award tasks such as determining allow-ability of expenses, project close outs, and getting new projects set up for use (appointing personnel and setting up sub-contracts, noting and tracking cost shares and grad school tuition matches, etc.).

- Meet with PI or admin. associate as needed to work out any issues that come up or to plan the coming project periods on the OSP awards.
- Create budget projections showing the effects of proposed changes to the current spending plans.
- Can help to gather information needed to create new proposal budgets and create PA005s on behalf of PI. **NOTE-It is preferable that PI creates these so that Grant Manager can approve on behalf of the department as stated above.**
- Be the initial contact person to help answer questions and resolve any problems regarding your OSP funding making use of Grants Office contact network when additional help is needed.

Basic Processes Workflow- on OSP projects

Admin Assoc.

Grant Mgr

Others

For purchasing or payment requests in eRequest system	provides level 1 approval for any purchasing requests using OSP funding per OSU and dept policy	provides level 2 approval for requests based on available funding and sponsor/OSP guidelines	ASC Business Service Center works with purchasing dept to actually place the order with the vendor
For travel requests in eTravel system	helps make travel arrangements and requests/approves the travel # for reimbursement later. After the trip, submits receipts to service center for reimbursement processing	provides approval for requests based on available funding and sponsor/OSP guidelines	ASC Business Service Center works with OSP travel dept to create travel authorization and later the reimbursement payment request.
For HR appointment changes or Direct Retro Distribution changes	facilitates the requested changes providing the grant manager with the details and any required forms.	enters the requests directly in to the HRA attaching any necessary DocuSigned forms.	ASC Business Service Center enters changes into the PeopleSoft system.
For ODP or release time requests	routes the required HR forms through the DocuSign system and place in the HR Intake folder in Buckeye boxes	enters the requests directly in to the HRA attaching any necessary DocuSigned forms.	ASC Business Service Center enters changes into the PeopleSoft system.
For any other HR Actions (Hires, terminations, any other changes	works with PI to make the requests directly to the HR associate	provides funding approvals and project allow-ability as consulted. Notifies PI and department when this action will require adjustments to current spending pattern.	HR associate will input the HRA into the system after gathering all needed documentation and work with ASC business center personnel to get it done
For cost transfers to/from OSP projects	At the PI's or GM's request, gathers the required backup, gets the cost tranfer form signed and enters the Journal entry into the PeopleSoft system.	reviews and provides approval for journals to or from projects and moves it on to OSP for posting.	OSP Accounting will provide the final approval and post transfers to the project.