One-on-One New PI Training

1) **Accounting statements:** You will receive monthly statements from Roxann King in Accounting Services about your monthly expenditures. Please read them. You are responsible for making sure you don't overspend, not OSP or Accounting Services.

2) **Allowable charges:** OSP is in charge of making sure all grant charges are allocable and allowable. Therefore all charges are reviewed by OSP. If we see a charge we don't understand or isn't on your budget then we will contact you for clarification. If there isn't a sufficient explanation for the charge or permission is not granted by the funder for the charge, then we are obligated to deny the charge.

3) **Budget Revisions:** If you need to move money around in your budget (i.e., you now need more money in scholarships or salaries) because you are overspending in one category, you will need to do a budget revision requested through OSP. Money has to be moved out of one category and into another so there is a zero sum difference. You cannot move more than 10% of total funds awarded or change the scope of work without funder approval. If you need to make a budget revision, please email your contact in OSP with your request and we will process it.

4) **Paw Place and P-Cards:** Grants at WSU do not operate on P-cards. To make charges on your grant, please use your department P-card and then complete a P-card reallocation to transfer the expenditures to your grant index account. Please ask your departmental administrative assistant if you need help on this task. If you purchase food on your P-Card, you must attach a participant list to the documentation to validate the food purchase.

   Following the usual university guidelines, some purchases and all requisitions must be processed through Paw Place. If you have any questions about which method to use, please contact Weber State's Purchasing Department at (801) 626-6014 or consult these links:

   http://www.weber.edu/purchasing/guides.html

   http://www.weber.edu/purchasing/pawplace_forms.html

5) **Travel Reimbursement**

   Sponsored program related travel expenses must be processed through Weber State University's online Travel Reimbursement system. The Travel Reimbursement system is available as an app in the eWeber portal. The following link will help you better understand the Travel Reimbursement system.

   http://www.weber.edu/purchasing/Travel.html

If you have any questions regarding the Travel Reimbursement system, please contact Brad Budge, in Purchasing, at (801) 626-7113.

6) **Matching Funds (Cost Share):**
***You may skip this section If your project does not involve matching funds.
If your grant has matching funds/cost share then a separate match index will be created at the same time we set up your grant index to track your match (e.g., salaries).

Match may be in the form of WSU cash, in-kind contributions, or third-party contributions. In-kind match is the value of allowable non-cash project costs provided by the university and/or eligible third parties that can be documented by supporting records. This type of match may be in the form of volunteer time, travel expenses, non-routine supplies, specialized equipment, materials, and, very rarely, contributed indirect costs.

Cash match is actual cash from the university and/or eligible third parties dedicated to defray a portion of a project's costs. Cash match may be from the Provost's cost-sharing fund, from deans' or department chairs' budgets, or from gifts, donations, or cash participation of eligible third parties.

Cash and in-kind match, once identified as a university contribution to a sponsored project, cannot be claimed as match on any other project. No Federal funds can be claimed as cash or in-kind match on any other Federally funded project.

Cash cost-sharing funds must be spent in accordance with the sponsor's approved budget for allowable expenditures, and must be available and used within the defined project period of performance.

In-kind match will not run through the Banner Lynx system but OSP will need to collect and store all documentation that the match has been met in order to comply with auditing requirements. Be sure to collect all your match documentation as you go because it is difficult to collect after the fact. You can access printable forms to track your in-kind match at the OSP website.

However, if the match is from a gift fund, a letter from the dean indicating that the match is dedicated, will satisfy an audit.

7) **Salary Match:** If your grant requires salary match, then **you** (or your admin) must submit an ePAR FOAPAL change during the period of performance utilizing your match index to track the match. Below are the steps for doing so:
   A. Go to the eWeber Portal
   B. Go to ePAR
   C. Select ePARs salaried from the drop down menu
   D. Then choose FOAPAL change from the drop down menu
   E. Enter in your W#

F. Select the correct position (your primary job position that will start with a C or a P)
G. The next page will tell you from what index it is being paid
H. Click on the box that indicates what percentage time you are being paid from the index (usually 100%) and reduce it the necessary amount (eg., 5% or 10%)
I. Then add another index at the bottom of the page, type in the match index number, then click find to make sure it is a valid index
J. As long as the index is valid and the job has 100% funding then you are able to click submit
K. If you have any questions please contact Lisa Allen in Payroll (x6602)

8) **End Date:** As your grant end date draws to a close, please let us know if you will be extending your grant. Any unspent funds will be returned to the funder. However, you cannot spend grant money on anything you wish near the end of the grant just to spend down the funds. For example, a computer purchased in the last 3 months of the grant will look suspicious to the funder because, as it is purchased so late, the computer will obviously not be used to perform the work of the grant.

9) **Hiring**: The hiring process utilizing grant monies must follow the normal Human Resources (HR) protocols (e.g., the job must be posted and advertised). Please contact HR for more details at x6032 or hr@weber.edu.

10) **Reporting:** It is the PI responsibility to create all research reports required by the grant or contract and submit such reports to the funding agency. Additionally, it is the responsibility of the PI to ensure OSP receives a copy of the research report.