**WSU Post-Award Problem Solving**

1. Your site could have contracts entered in SmartGrant. Often, there can be different contract invoicing requirements or even a specific invoice schedule that must be followed. For example, monthly invoices must be generated to a vendor. Where and how could you handle management of contract invoices in the award record? You can use one of your training awards to test your answer.

**Answer: *ERASS demonstrated how deliverables of any frequency can be setup in the award. For example, monthly activity reports could be entered with a frequency set to “monthly”. For other specific tasks, a deliverable could be setup with a “one-time” frequency. The administrator would receive an email reminder from SmartGrant of its pending due date. The deliverables for contracts may not be automatically setup because of their unique nature but administrators can manually add them into the award deliverables section for management, tracking, and sending of email reminders.***

1. The lead PI on your grant is leaving the university—he has won the lottery ☺. The project is in its final year and will remain at the university per approval from the sponsor. A new PI must be named and replace the departing PI on the grant. Where and how in the award record will you remove current PI and add a new PI? You can use one of your training awards to test your answer.

**Answer: *PI changes can only be done under award revisions. Specifically, a PI change must be initiated from Revisions🡪New Revision🡪PI Change. The PI to Remove is selected from the list and the New PI is searched/selected as the replacement.***

1. Based on the first 9 months success of the project, the funding agency has decided to award the PI an additional $10,000 to extend the PI’s program for six (6) more months beyond current project end date. The money was received by check in regular mail and no pre-award request was officially made in SmartGrant. Using your award created without proposal:
   1. change the award project end date by 6 months
   2. change the current award budget period end date out to 6 months OR add a new award period 6 months in length
   3. initiate a budget change to reflect new funding of $10,000.

*NOTE: You can post this budget once finalized.*

**Answer: *If the project end date has changed, EDIT the Award Profile page and update the PROJECT END DATE field. The new award period of six months will also need to be added under the Award Budget Periods section. Enter new 6-month period start and end date (or add 6 months to last award period). Click the radio button next to new 6-month period to make it the active award period or the period in which the new monies will be added and budgeted. At the top of the page, it would be helpful to enter a reason for updating the award page as this will display in the history log. Click Save. Navigate into Accounting🡪Budget Changes🡪Budget Changes🡪New Budget Change🡪Add to Budget, add a new obligation. Manually add the $10,000 into the budget to achieve a final budget balance of zero/$0. Post the budget.***

1. The award budget has already been posted under the index number in the award; however, the administrator realizes—too late—that the MASTER fund number was incorrectly entered. What is the workflow in the SmartGrant award record to correct the index number mistake and make sure the budget resides under the correct fund number? There are multiple steps that need to be followed to completely resolve this issue. *HINT: You’ll want to make sure the correct index number is added before any funds are moved from wrong fund to the correct fund.*

**Answer:**

1. ***Accounting🡪Add New Account🡪Setup new and correct number and mark it (temporarily) as a sub account type.***
2. ***Navigate to Accounting***🡪***Account List***🡪***Select INCORRECT MASTER number***🡪***Select Edit***🡪***Enter Justification***🡪***Click Continue***🡪***Change Type from MASTER to SUB***🡪***Click Update.***
3. ***Navigate to Accounting***🡪***Account List***🡪***Select NEW CORRECT number***🡪***Select Edit***🡪***Enter Justification***🡪***Click Continue***🡪***Change Type from SUB to MASTER***🡪***Click Update.***
4. ***Confirm new account type and setup by navigating into Accounting***🡪***Account List. Click Close.***
5. ***Navigate to Accounting***🡪***Budget Changes***🡪***Budget Changes***🡪***New Budget Change***🡪***Re-Allocate. Provide justification and code (prior mistake and Update. Move monies from INCORRECT account number into NEW CORRECT MASTER account number. Post.***
6. ***Navigate to Accounting***🡪***Account List***🡪***Select OLD NUMBER under which budget was moved from*** 🡪***Select Edit***🡪***Enter Justification***🡪***Click Continue***🡪***Change Account Status to INACTIVE***🡪***Click Update.***

1. You want to make sure that your communication with the PI about a phone conversation on change of scope of work is documented in the award. You also want to copy the director of the office on the communication because of past problems with this same PI. Using any of the training awards, document the communication and send the communication to yourself. *HINT: Is that person setup as a contact on the award? If not, make a decision if they need to be added.*

**Answer: *Add a new communication log. Make sure to check the Send Email box. Click to ADD RECIPIENTS, although the person may not yet be added into the contacts list. If not, exit the communication log and add them as an internal contact. Or, you could add them as a one-time recipient which does not add them to the contacts list but will send them the email for this one communication.***

1. The department administrator has called you to obtain a quick count of the total number of awards AND funding sources for PI TEST RESEARCHER. Where can you go to quickly find this information? HINT: You may have to back out of your current award to find this out.

**Answer: *Award List Manager. Click Filter tab. Enter PI name of “Researcher” in text search PI field—making sure to enter last name EXACTLY as setup in SmartGrant. Click Submit. Multiple awards. Proposal List Manager. Click Filter Tab and enter PI name with AWD status. Click Reports tab and include data elements for the report.***