

FOA/PSSOA Annual Conference

Sponsored Programs Affinity Group

Monday, March 10, 2014

10am – 2:30pm

Agenda

Come prepared to discuss:

- 1. Common sponsored programs invoicing categories and use of Project Collection screen (SP Mod, Award Entry);*
- 2. Business processes related to Dept ID and College (SP Mod, Award Entry > Assoc Project) – and –*
- 3. Common use of CIP Code field as a HERD Survey Ref – for use in downloading fiscal year expenditure data for completion of annual Higher Education R&D (HERD) Survey*

1. Discuss Billing Categories and SP Billing Processes 10:00 – 11:45

(Important: submit your 3 most common invoice summary formats by March 6th to sderosa@calstate.edu) or upload to the SharePoint Meeting folder [2014-03 FOA](#))

- a. Review business practices and use of the SP Mod, Award Entry > Project Collection screen
- b. Develop 5 – 10 (as few as possible) billing categories/invoice templates to fit most common sponsor requirements

Lunch Break – begin discussion on Dept IDs, etc... 11:45

2. Review Dept ID, College in SP Mod, Award Entry > Assoc Project screen 12:00 – 1:00

- a. Discuss purpose of the Dept ID in the Assoc Project (*currently used in F&A/IDC calculation – should it be moved to the IDC screen*)
- b. Review different campus business practices related to Dept ID in finance and on the Assoc Project screen
- c. Discuss use of Dept Tree in reports

3. Review Assoc Project screen CIP Code 1:00 – 2:00

Determine how to use in extracting data for the annual HERD (Higher Ed Research & Development) survey conducted by the National Science Foundation (*survey of R&D expenditures by universities across the nation*)

4. Develop/refine recommendations on the above 2:00 – 2:30