Sheryl Koenig OSPA Grants and Contracts Administrator (GCA), presented the concept and use of the “condensed budget” when entering proposal budgets in the PeopleSoft Grants Module (PSGM). Instructions for the required processes, both from OSPA staff and departmental personnel were distributed via e-mail to GCSG prior to the meeting.

Key points addressed:
- This is a tool to be used at the discretion of the divisions/colleges and departments; it is not a change in OSPA policy but rather an attempt to facilitate processes
- The total budget on the PSRS must match the total dollars being requested from the sponsor
- A full line item budget will be required at the award stage and must be entered in PSGM as the FINAL version
- New signatures on the FINAL version will only be required if the Dept ID changes, percent effort changes, or the budget changes plus/minus by more than 10%. Because signatures are not required the department must notify their cognizant GCA when the FINAL version is complete providing enough information i.e. project ID so that the version can be easily identified.
- Any request for a pre-award account will require that a FINAL version be created

Questions that were raised:
- Cost Share – Multiple Dept ID’s for cost share can be entered by inserting as many rows as necessary in the cost share panel, however, at award the individual Dept ID’s will need to be allocated in the FINAL version
- Internal Budgets – It was suggested that internal budgets would be helpful for review purposes, to verify appropriate calculations for cost recovery i.e. F&A, fringe benefits etc. Although this is not an OSPA requirement the departments should be aware that all such costs will be recovered from project dollars if the amount is not received from the sponsor.

NSF Change

Paula Teel, OSPA Grants and Contracts Administrator, informed the group that NSF has a new process for submitting Letters of Intent (LOI). All LOI submissions must now be handled through the Sponsored Programs office.
- The PI creates the LOI from Prepare Proposal, allowing SRO access to View/Edit/Submit when ready.
- If a budget is required to be submitted with the LOI the PI will need a PSRS, if no budget is required then neither is a PSRS.
- Any PI needing assistance with this new process can contact Paula directly at teelp@missouri.edu.
Department/PI Procedure for Proposals with Condensed Budgets

Condensed Budget = those budgets which are entered in PS with one line for all items to which F&A applies and one line for all items to which F&A does not apply. However, the budget going to the agency contains other categories, as well.

In order to streamline the proposal process, a department/PI may utilize a one or two line budget at proposal time. However, a more comprehensive budget is required at award time.

1. In PeopleSoft (PS), in the Budget Line Summary panel, enter all funds for which F&A applies in one line with a category of “Other”. Enter all funds for which F&A does not apply in one line with a category of “Other No F&A.”

2. When the award comes in, the Grants and Contracts Administrator (GCA) will notify the PI/Department that a FINAL version of the budget must be entered in PS.

3. Use the “Copy Proposal” function to generate a FINAL version of the proposal in PS. Attached is a comprehensive procedure for copying proposals to create a FINAL version. Be sure to copy to the same proposal number, the same project number, but designate the version ID of “FINAL”.

4. It is not necessary to generate a PSRS unless DeptID’s change from the original version. If DeptID’s (project DeptID, Shared Credit DeptID’s, Cost Share DeptID’s) change, those people/departments affected by the change should sign the new PSRS.

5. The PI/Department person should send an email to the GCA to indicate that the FINAL version is ready for awarding. This version constitutes DeptID verification. If DeptID’s changed, then the signed PSRS should be forwarded to the GCA to indicate that the FINAL version is ready for awarding.

6. Upon receipt of email notification or PSRS that the FINAL version is ready, the GCA “submits” the FINAL version on the “Submission” panel in PeopleSoft.

7. Once PI approval, legal approval, OTSP approval, IRB approval, ACQA approval and any other compliance issues are in place, the GCA generates the award for the FINAL version.

If a request for a Pre-award account is made, a FINAL version will need to be in place before generating the Pre-award account.