

OFFICE OF THE CONTROLLER

Finance Intranet

Faculty Reports for Principal Investigators

March 2024





Table of Contents

The HUB	3
Faculty Reports: Grant Dashboard	6
Helpful Tips and Resources	29



The HUB



UNIVERSITY OF
South Carolina

What is the HUB?

- An internal reporting site that houses various reporting tools and resources used to research financial transactions and retrieve account balances.
- The main section covered in this presentation is Faculty Reports.
- Use this URL to access the HUB: www.admin.sc.edu
- You can also access other important sites from this page:
 - PeopleSoft HCM and PeopleSoft Finance
 - USCeRA
 - Controller's Office Webpage



The HUB

The screenshot shows the HUB homepage for user Joanne Callahan. The interface has a dark red header with 'HUB' and a dropdown arrow on the left, and a home icon and 'Sign out' link on the right. Below the header, the user's name 'Callahan, Joanne' and email 'JOANNEC@mailbox.sc.edu' are displayed, along with a session timestamp 'as of 01/22/2024 02:42'. A row of eight report tiles is shown: Payroll Reports (envelope icon), Financial Reports (classical building icon), Student and Tuition Reports (teacher at whiteboard icon), Analytics (line graph icon), Faculty Reports (lecturer at podium icon, highlighted with a red border), Facilities Reports (house and pencil icon), Legacy Reports (floppy disk icon), and Controller's Office (group of people icon). A 'System' tile with a gear icon is located at the bottom left.

On the HUB
Homepage,
click **Faculty Reports**.



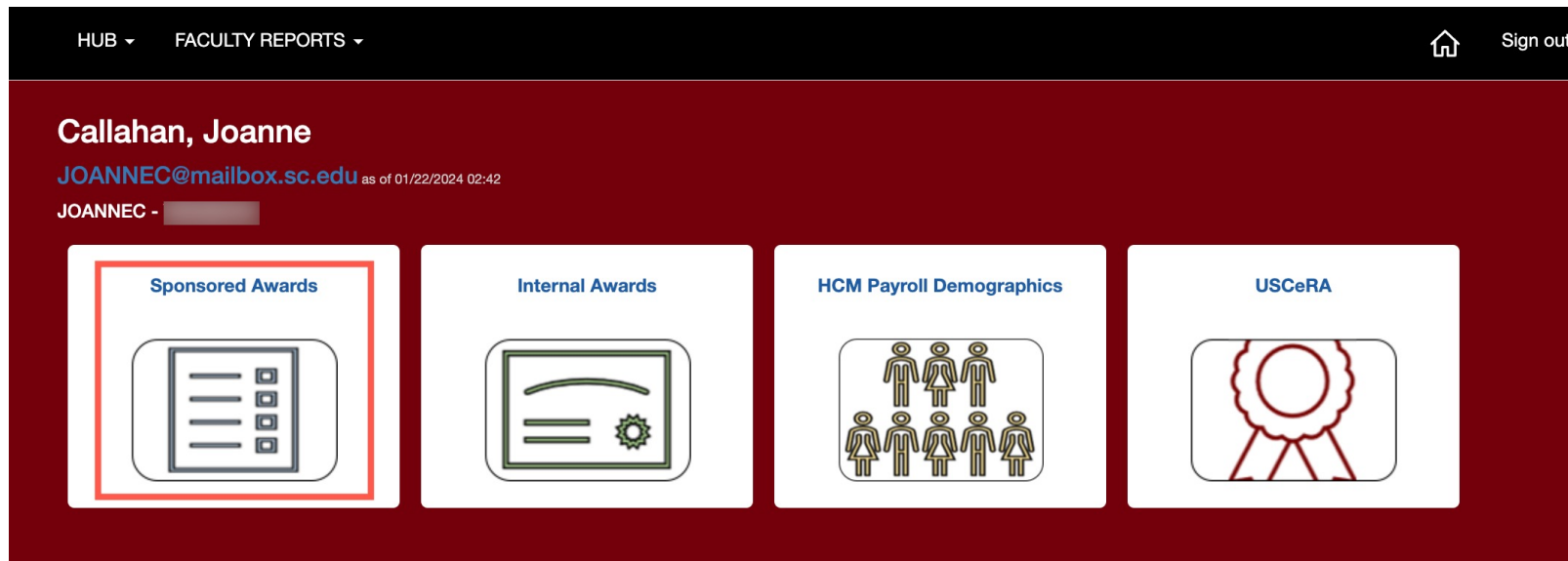
UNIVERSITY OF
South Carolina

Faculty Report: Grant Dashboard



UNIVERSITY OF
South Carolina

Faculty Reports



- **Sponsored Awards:** This tile will take you to the Grant Dashboard and provide financial activity associated with external research.
- **Internal Awards:** This tile will take you to the Non-USCSP Dashboard and provide financial activity related to internal research or activities.
- **HCM Payroll Demographics:** This tile will provide payroll activity related to any projects you are listed as PI.
- **USCeRA:** Link directly to USCeRA system.



Grant Dashboard

- Provides Principal Investigators the ability to access expense data for USC sponsored projects (USCSP).
- Expenses will be grouped in the similar categories as shown on the Standard USC Invoice submitted to sponsors.
- Gives the ability to expand categories to show detail account codes.
- Provides budget and actual expenses for direct costs and cost share.
- Enables you to track cost share and ensure you are spending within ratio.



INVOICE NO:
CGA0093550



ACH Payment
Banking Institution: Wells Fargo Bank, NA
Routing Number: 121000248
Account Number: 2000021014015
Swift Code: WFBIUS6S

Jan 15, 2024

University at Buffalo, SUNY
ubsd.RFSsubcontractInvoices@buffalo.edu

Check Payment
University of South Carolina
Office of the Controller
Grants and Funds Management
1600 Hampton Street, 6th Floor
Columbia, SC 29208

REIMBURSEMENT REQUEST FOR EXPENDITURES THROUGH Dec 31, 2023

GRANT NAME: Next-Generation Ammonia System Integration Utilizing Intermittent Renewable Power (REFUEL Integrations & Testing Program)

GRANT NUMBER: [Redacted]

PRINCIPAL INVESTIGATOR: [Redacted]

BUDGET PERIOD: 7/25/22 - 7/24/24

CATEGORY:	BUDGET AMOUNT	CURRENT AMOUNT	CUMULATIVE AMOUNT
1 SALARIES	66,364.00	3,120.28	44,180.01
2 FRINGE BENEFITS	2,275.00	14.04	1,999.55
3 TRAVEL	3,000.00	2,156.57	3,769.58
4 SUPPLIES	35,769.00	707.94	11,672.97
5 FIXED CHARGES	0.00	0.00	0.00
6 CONTRACTUAL SERVICES	0.00	0.00	22.90
7 CAPITALIZED EQUIPMENT	0.00	0.00	0.00
8 OTHER DIRECT COST	0.00	0.00	0.00
TOTAL DIRECT COST:	107,408.00	5,998.83	61,645.01
INDIRECT COST:	52,630.00	2,939.42	30,206.11
TOTAL COST:	160,038.00	8,938.25	91,851.12
COST SHARE (IF APPLICABLE):	100,000.00	2,196.07	42,860.98

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

TOTAL DUE
\$8,938.25

Do not include Cost Share with Payment

CONTRACT NUMBER: CON0006798
PROJECT ID: 10012779
DEPT ID: 155100
BILLER04: Andrea Gack

Mandy M Kibler

Billing Authority: Mandy Kibler, Controller
University of South Carolina

PeopleSoft Standard Invoice



UNIVERSITY OF
South Carolina

INVOICE NO:
CGA0093550



Jan 15, 2024

University at Buffalo, SUNY
ubsd.RFSubcontractInvoices@buffalo.edu

ACH Payment
Banking Institution: Wells Fargo Bank, NA
Routing Number: 121000248
Account Number: 2000021014015
Swift Code: WFBIUS6S

Check Payment
University of South Carolina
Office of the Controller
Grants and Funds Management
1600 Hampton Street, 6th Floor
Columbia, SC 29208

REIMBURSEMENT REQUEST FOR EXPENDITURES THROUGH Dec 31, 2023

GRANT NAME: Next-Generation Ammonia System Integration Utilizing Intermittent Renewable Power (REFUEL Integrations & Testing Program)

GRANT NUMBER: [REDACTED]

PRINCIPAL INVESTIGATOR: [REDACTED]

BUDGET PERIOD: 7/25/22 - 7/24/24

CATEGORY:	BUDGET AMOUNT	CURRENT AMOUNT	CUMULATIVE AMOUNT
1 SALARIES	66,364.00	3,120.28	44,180.01
2 FRINGE BENEFITS	2,275.00	14.04	1,999.55
3 TRAVEL	3,000.00	2,156.57	3,769.58
4 SUPPLIES	35,769.00	707.94	11,672.97
5 FIXED CHARGES	0.00	0.00	0.00
6 CONTRACTUAL SERVICES	0.00	0.00	22.90
7 CAPITALIZED EQUIPMENT	0.00	0.00	0.00
8 OTHER DIRECT COST	0.00	0.00	0.00
TOTAL DIRECT COST:	107,408.00	5,998.83	61,645.01
INDIRECT COST:	52,630.00	2,939.42	30,206.11
TOTAL COST:	160,038.00	8,938.25	91,851.12
COST SHARE (IF APPLICABLE):	100,000.00	2,196.07	42,860.98

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

TOTAL DUE
\$8,938.25
Do not include Cost Share with Payment

CONTRACT NUMBER: CON0006798
PROJECT ID: 10012779
DEPT ID: 155100
BILLER04: Andrea Gack

Mandy M Kibler
Billing Authority: Mandy Kibler, Controller
University of South Carolina

Comparing the Invoice with the Grant Dashboard

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	3,120.28	44,180.01	22,183.99		22,183.99	38,720.00	17,260.74	21,459.26
FRINGE BENEFITS	2,275.00	14.04	1,999.55	275.45		275.45	13,629.00	5,688.23	7,940.77
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	2,156.57	3,769.58	(769.58)		(769.58)			
SUPPLIES	35,769.00	707.94	11,672.97	24,096.03		24,096.03			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	5,998.83	61,645.01	45,762.99		45,762.99	74,349.00	31,615.97	42,733.03
INDIRECT COST RECOVERY	52,630.00	2,939.42	30,206.11	22,423.89		22,423.89	25,651.00	11,245.01	14,405.99
INDIRECT EXPENSE	52,630.00	2,939.42	30,206.11	22,423.89		22,423.89	25,651.00	11,245.01	14,405.99
TOTAL EXPENSE	160,038.00	8,938.25	91,851.12	68,186.88		68,186.88	100,000.00	42,860.98	57,139.02

Grant Dashboard – Output Options

HUB ▾ Finance Intranet ▾ GRANT DASHBOARD SUMMARY 🏠 Sign out

Operating Unit <input type="text"/>	Project <input type="text"/>	Class <input type="text"/>
Department <input type="text"/>	Project Status Active ▾	Fiscal Period GL 2324 007-January [OPEN] ▾
Fund <input type="text"/>	PI <input type="text"/>	<input type="checkbox"/> Display Account Chartfield
Contract <input type="text"/>	Business Manager (BM) <input type="text"/>	<input type="radio"/> Detail <input checked="" type="radio"/> Summary
	Sponsor <input type="text"/>	

0s

- The default output option is **Detail**.
- Use the drop down to select **Summary**.
- Select the applicable fiscal period. The default is the current month.

HUB ▾ Finance Intranet ▾ GRANT DASHBOARD SUMMARY Sign out

Operating Unit

Department

Fund

Contract

Project

Project Status

Active ▾

PI

Business Manager (BM)

Sponsor

Class

Fiscal Period

GL 2324 007-January [OPEN] ▾

Display Account Chartfield

Output

Summary ▾

[Submit](#) [Clear](#) [CSV](#)

Project	Title	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
10012848	Project 47- Synthesis of Well	40,000.00	5,433.52	24,699.79	15,300.21		15,300.21			
10011280	REU Site: CO2 Chemical Engineering: Opportunities	413,036.00		252,220.45	160,815.55		160,815.55			
10013139	Fuel Flexible Gas Turbine Technology Integrated wi	100,000.00	4,965.29	28,261.69	71,738.31		71,738.31			
10012323	Design of New Catalysts for the Generation of Clea	587,990.00	9,893.39	416,698.46	171,291.54	2,115.00	169,176.54			
10012397	ONR - Development, Assessment and Simulation of En	138,437.00	3,008.47	93,403.36	45,033.64		45,033.64			
10012847	Project 47- Synthesis of Well	15,000.00		10,921.12	4,078.88	1,241.25	2,837.63			
10013138	Fuel Flexible Gas Turbine Technology Integrated wi	453,201.00	8,783.01	90,090.98	363,110.02		363,110.02			
10010963	Compact Catalytic Membrane	449,855.00	11,474.50	377,368.11	72,486.89		72,486.89	133,939.00	133,570.16	368.84
10012779	Next-Generation Ammonia System Integration Utilizi	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34
10012395	ONR - Development, Assessment and Simulation of En	416,002.00	13,757.34	311,676.22	104,325.78	17,462.65	86,863.13			
10012324	Design of New Catalysts for the Generation of Clea	400,000.00	13,335.96	250,262.00	149,738.00		149,738.00			
REPORT TOTAL		3,173,559.00	74,441.86	1,951,243.68	1,222,315.32	20,818.90	1,201,496.42	233,939.00	177,570.82	56,368.18

Grant Dashboard – Summary Output

- Shows totals for each project using the selected criteria.
- Provides a **Report Total**.
- In this example, we are looking at **Active** projects for a **specific PI**.
- Can drill down into detail view by selecting any of the project numbers on the screen.



HUB ▾ Finance Intranet ▾ GRANT DASHBOARD Sign out

Operating Unit

Department

Fund

Contract

Project

Project Status

Active ▾

PI

Business Manager (BM)

Sponsor

Class

Fiscal Period

GL 2324 007-January [OPEN] ▾

Display Account Chartfield

Output

Detail ▾

[Submit](#) [Clear](#) [CSV](#)

10012848
[Project 47- Synthesis of Well](#) CeRCaS Phase II Memberships- NSF 1939876 CON0005084 U00032805 01/01/2023-02/29/2024 [14 months]

Operating Unit	Department	Fund	Class
CL040 ENGINEERING - COMPUTING	155100 CHEMICAL ENGINEERING RESEARCH	J1000 COMMERCIAL GRANT	202 INDIVIDUAL AND PROJECT RSRCH

PROJECT TEAM

Role	Name	USCID	Email
APPRV_1	Wagner,Alicia		alewin@mailbox.sc.edu
CGA	Williams,Sydney B		sydneymb@mailbox.sc.edu
PI	Lauterbach,Jochen Anton		lauteraj@mailbox.sc.edu

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [13 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	21,484.00	1,270.89	11,438.01	10,045.99		10,045.99			
FRINGE BENEFITS	97.00	5.08	50.84	46.16		46.16			
CONTRACTUAL SERVICES			200.00	(200.00)		(200.00)			
TRAVEL	1,000.00		1,317.61	(317.61)		(317.61)			
SUPPLIES	9,795.00	150.55	6,230.53	3,564.47		3,564.47			
SCHOLARSHIPS	7,624.00	4,007.00	5,462.80	2,161.20		2,161.20			
DIRECT EXPENSE	40,000.00	5,433.52	24,699.79	15,300.21		15,300.21			
INDIRECT COST RECOVERY									
INDIRECT EXPENSE									
TOTAL EXPENSE	40,000.00	5,433.52	24,699.79	15,300.21		15,300.21			

BURN RATE	(dollars)	2,857.14	1,899.98	COST SHARE RATIO	0.00%	0.00%
	(%)	7.14%	66.50%			

• Burn rate in dollars = the average monthly budget vs. actual expenses to determine if the spending on the award is above or below the average.
 • Burn rate budget percentage = the average monthly expenditures as a percent of the total budget.
 • Actual burn rate percentage = the actual average monthly expenses divided by the average monthly budget expenses to show if the spending on the award is above or below the average rate.
 An actual burn rate of below 100% would show spending slower than average, whereas a burn rate of above 100% would show spending faster than average.

Grant Dashboard – Detail Output

- This is the default output option.
- Provides the project detail for all the projects the specific PI is responsible for.
- In this example, we are looking at **Active** projects for a **specific PI**.
- Can drill down into detail view by selecting any of the active links on the screen.

Grant Dashboard – Search Criteria

Provides the ability to view by single project, contract, PI or Sponsor.

The screenshot shows the 'GRANT DASHBOARD' search criteria form. The form is organized into three columns. The left column contains 'Operating Unit', 'Department', 'Fund', and 'Contract' fields. The middle column contains 'Project' (with value '10012715'), 'Project Status' (dropdown set to 'Active'), 'PI', 'Business Manager (BM)', and 'Sponsor' fields. The right column contains 'Class', 'Fiscal Period' (dropdown set to 'GL 2324 007-January'), a checkbox for 'Display Account Chartfield', and an 'Output' dropdown (set to 'Detail'). At the bottom are 'Submit', 'Clear', and 'CSV' buttons. Red boxes highlight the 'Project', 'Contract', and 'Fiscal Period' fields.

- As the PI, your USCID will auto populate in the PI field.
- Search by Contract for grants with multiple projects or by a Specific Project.
- Select **Display Account Chartfield** to drill down into the Categories to see related accounts.
- For today's example, we will search by **Project** for fiscal period **2224 - January**.



Grant Dashboard – Project Details

Here you can view the Project name, contract number, beginning/end date, Sponsor, and Project Team.

10012715			CON0006754	09/08/2022-08/31/2024
Addressing Rural Cancer Disparities via Proactive	Medical University of South Carolina		A23-0073-S002, 1R01CA268023-01A1	[23.7 months]
Operating Unit	Department	Fund	Class	
CL034 PUBLIC HEALTH	115070 RURAL AND MINORITY RESEARCH	F1000 FEDERAL GRANT	202 INDIVIDUAL AND PROJECT RSRCH	
PROJECT TEAM				
Role	Name	USCID	Email	
BM	Godbold, Janie R	Y22288042	godboldj@mailbox.sc.edu	
CGA	Grady, Sylvira LaToya	G04650922	gradysl@mailbox.sc.edu	
KEY	Chen, Brian Ken	Y15242912	bchen@mailbox.sc.edu	
PI	Hung, Peiyin	U15807928	hungp@mailbox.sc.edu	

BM is the **Business Manager**
CGA is the **Post Award Accountant**



UNIVERSITY OF
South Carolina

Grant Dashboard – Data Review

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	2,543.88	64,188.89	43,219.11		43,219.11	74,349.00	32,380.86	41,968.14
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
TOTAL EXPENSE	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34

- Total Budget for the project.
- Current Month Activity by each category.
- Balance equals the Budget minus the Life to Date Expenses.
- If there are encumbrances, they will populate in the Encumbrances column and be deducted to calculate the Available Balance.
- View cost share budget and actuals.



Data Review - Encumbrances

- Encumbrances represent open purchases orders and obligations on the project; common examples include:
 - ✓ Subawards
 - ✓ Consultants
 - ✓ Equipment purchases
 - ✓ Travel Advances
- Encumbrances **reduce your available balance**; must be reviewed regularly.
- De-obligation of encumbrances occur two different ways:
 1. **Subawards** – The final invoice must be received and paid prior to closing a purchase order related to a subaward. Closure and de-obligation of any subaward must be submitted to the Subaward Accountant (subinv@mailbox.sc.edu) to ensure needed coordination with the SAM Office occurs.
 2. **All Others** – Coordinate with your Business Manager to request closure directly to the purchasing office. (purchase@mailbox.sc.edu)



Data Review – Cost Share

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	2,543.88	64,188.89	43,219.11		43,219.11	74,349.00	32,380.86	41,968.14
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
TOTAL EXPENSE	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34

- Portion of project costs not provided by the Sponsor.
- Most sponsors expect cost share to be charged in **ratio** throughout the life of the project.
- Be sure to work with your Business Manager at the beginning of the funding to set this up appropriately.



Search Criteria – Display Account Details

UNIVERSITY OF South Carolina HUB ▾ Finance Intranet ▾ GRANT DASHBOARD Sign out

Operating Unit <input type="text"/>	Project 10012779	Class <input type="text"/>
Department <input type="text"/>	Project Status All ▾	Fiscal Period GL 2324 007-January [OPEN] ▾
Fund <input type="text"/>	PI <input type="text"/>	<input checked="" type="checkbox"/> Display Account Chartfield
Contract <input type="text"/>	Business Manager (BM) <input type="text"/>	Output Detail ▾
	Sponsor <input type="text"/>	

- Select **Display Account Chartfield** to expand the Categories.
- Expanded view will display the account codes that roll into each category.

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	66,364.00			66,364.00		66,364.00	38,720.00		38,720.00
51300 UNCLASSIFIED EMPLOYEES			5,415.35	(5,415.35)		(5,415.35)		17,817.52	(17,817.52)
51400 NON FED WORK STUDY STUDENTS		1,397.64	40,162.30	(40,162.30)		(40,162.30)			
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
51900 FRINGE BENEFITS		5.59	2,005.14	(2,005.14)		(2,005.14)		5,896.34	(5,896.34)
51995 FRINGE EXPENSES BUDGET	2,275.00			2,275.00		2,275.00	13,629.00		13,629.00
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
52010 FREIGHT,EXPRESS AND DELIVERIES			22.90	(22.90)		(22.90)			
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
52022 STUDENT TRAVEL			2,156.57	(2,156.57)		(2,156.57)			
52024 USC EMPLOYEE TRAVEL DOMESTIC	3,000.00	159.82	1,772.83	1,227.17		1,227.17			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
53000 SUPPLIES	35,769.00			35,769.00		35,769.00			
53004 DATA PROCESSING SUPPLIES			248.39	(248.39)		(248.39)			
53025 LAB SUPPLIES		980.83	12,195.41	(12,195.41)		(12,195.41)			
53031 COMP SOFTWARE UNDER \$100,000			210.00	(210.00)		(210.00)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
54525 GRADUATE ASSISTANT TUITION SUP							22,000.00	8,667.00	13,333.00
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	2,543.88	64,188.89	43,219.11		43,219.11	74,349.00	32,380.86	41,968.14
59990 INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
TOTAL EXPENSE	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34

Data Review – Account Details

- Monthly activity ties to USC’s standard invoice sent to Sponsors to request reimbursement.
- Be sure to review the report you receive monthly for your projects ensuring the expenses are accurate.
- Any questions regarding expenses should be directed to your Business Manager.



UNIVERSITY OF
South Carolina

From: CONTROLLER@sc.edu <CONTROLLER@sc.edu>
Sent: Thursday, February 1, 2024 9:01 AM
To: Crawford, Lindsay <TEDRICKL@mailbox.sc.edu>
Subject: Sponsored Award Monthly Summary Report

Hello,

Your monthly sponsored award summary report is now ready! This report will provide you a listing of all your active sponsored award projects and their available balances. To view; please select the link provided below. You may also log directly into the Grant Dashboard on the [Finance Intranet](#) to view this data.

Click here to view your [Grant Dashboard](#).

Don't forget - you can drill down into the transactions by clicking the hyperlinks in the report! A job aid for using the Grant Dashboard is available on the [Controller's Office](#) website.

If you have questions regarding one of your projects, please reach out to your business manager or post award accountant.

Thank you,

University of South Carolina
Controller's Office
1600 Hampton Street
Columbia, SC 29208
(803) 777-2602

Sponsored Award Monthly Summary Report



UNIVERSITY OF
South Carolina

Drill Down – Salaries

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	66,364.00			66,364.00		66,364.00	38,720.00		38,720.00
51300 UNCLASSIFIED EMPLOYEES			5,415.35	(5,415.35)		(5,415.35)		17,817.52	(17,817.52)
51400 NON FED WORK STUDY STUDENTS		1,397.64	40,162.30	(40,162.30)		(40,162.30)			
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
51900 FRINGE BENEFITS		5.59	2,005.14	(2,005.14)		(2,005.14)		5,896.34	(5,896.34)
51995 FRINGE EXPENSES BUDGET	2,275.00			2,275.00		2,275.00	13,629.00		13,629.00

- Provides the ability to drill down into the expense activity. This provides PIs with the capability to view the specific \$ amounts for their students (not just % of effort).
- Click on the expense you want to see for additional detail and information.



Drill Down – Salaries

GL Activity		FP = 007 AND REGEXP_LIKE(JOURNAL_STATUS, 'PUJ') AND a.ACCOUNT LIKE '51400%' AND (PROJECT LIKE '10012779%' OR OLD_PROJECT LIKE '10012779%')						
ACTUAL2324 as of 01/23/2024 03:14		Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2324-7	CL040-155100-F1000-51400-202-10012779-1- - -	PAY0178433	01/09/2024	01/10/2024	1,397.64	HR Payroll Journals	>>HCM	PAY
01/23/2024 18:26								

NAME	USCID	FISCAL PERIOD :	JOB	HCM	GROUP	PAY	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR	LBR
		JOURNAL		DEPT		PERIOD					\$	%
		2324-7 : PAY0178433	SURA	155101	HRL	01/15/2024	8001506710	01/12/2024	A00000096943	CL040-155100-F1000-202-10012779-	45.50	100.00%
		2324-7 : PAY0178433	SGRA	155101	I12	01/15/2024	8001507630	01/12/2024	A00000096943	CL040-155100-F1000-202-10012779-	1,270.89	100.00%
		2324-7 : PAY0178433	SURA	155101	HRL	01/15/2024	8001506803	01/12/2024	A00000096943	CL040-155100-F1000-202-10012779-	81.25	100.00%
TOTAL											1,397.64	

- Can view specific payroll data by drilling down clicking the **HCM** hyperlink.



Drill Down – Expenses

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
53000 SUPPLIES	35,769.00			35,769.00		35,769.00			
53004 DATA PROCESSING SUPPLIES			248.39	(248.39)		(248.39)			
53025 LAB SUPPLIES		980.83	12,195.41	(12,195.41)		(12,195.41)			
53031 COMP SOFTWARE UNDER \$100,000			210.00	(210.00)		(210.00)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			

GL Activity	FP = 007 AND REEXP_LIKE(JOURNAL_STATUS, 'PU') AND INVOICE_TREE LIKE '% %SUPPLIES%' AND (PROJECT LIKE '10012779%' OR OLD_PROJECT LIKE '10012779%')							
ACTUAL2324 as of 01/23/2024 03:14	Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source	
2324-7 CL040-155100-F1000-53025-202-10012779-1- - -	EXA0178804	01/16/2024	01/16/2024	33.15	Expense Accruals	SHT3000171642	EX	
Drummond, Samuel	Drummond, Samuel				PCARD24164073342105222804497-21963151211			
2324-7 CL040-155100-F1000-53025-202-10012779-1- - -	EXA0178804	01/16/2024	01/16/2024	781.38	Expense Accruals	SHT3000171642	EX	
Drummond, Samuel	Drummond, Samuel				PCARD24789303337770200143755-41931812043			
2324-7 CL040-155100-F1000-53025-202-10012779-1- - -	EXA0179028	01/17/2024	01/18/2024	153.98	Expense Accruals	SHT3000171894	EX	
Bartl, Johanna Adriana	Bartl, Johanna Adriana				PCARD24055233347762329805301-12308941214			
2324-7 CL040-155100-F1000-53025-202-10012779-1- - -	EXU0179031	01/18/2024	01/18/2024	12.32	Expense Use Tax Accruals	3000171894	EXU	
- TOTAL				(980.83)				

- Provides the ability to drill down into the expense activity.



Drill Down – Expenses

GL Activity FP = 007 AND REGEXP_LIKE(JOURNAL_STATUS, 'PU') AND INVOICE_TREE LIKE '%SUPPLIES%' AND (PROJECT LIKE '10012779%' OR OLD_PROJECT LIKE '10012779%')

ACTUAL2324 as of 01/23/2024 03:14		Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2324-7	CL040-155100-F1000-53025-202-10012779-1- --	EXA0178804	01/16/2024	01/16/2024	33.15	Expense Accruals	SHT3000171642	EX
	Drummond,Samuel	Drummond,Samuel				PCARD24164073342105222804497-21963151211		
2324-7	CL040-155100-F1000-53025-202-10012779-1- --	EXA0178804	01/16/2024	01/16/2024	781.38	Expense Accruals	SHT3000171642	EX
	Drummond,Samuel	Drummond,Samuel				PCARD24789303337770200143755-41931812043		
2324-7	CL040-155100-F1000-53025-202-10012779-1- --	EXA0179028	01/17/2024	01/18/2024	153.98	Expense Accruals	SHT3000171894	EX
	Bartl,Johanna Adriana	Bartl,Johanna Adriana				PCARD24055233347762329805301-12308941214		
2324-7	CL040-155100-F1000-53025-202-10012779-1- --	EXU0179031	01/18/2024	01/18/2024	12.32	Expense Use Tax Accruals	3000171894	EXU
- TOTAL					(980.83)			

- Provides the ability to drill down into the expense activity.

SC_GM_DASHBOARD_EXPENSE_DTL- Grants Dashboard Expense Dtl

Download results in: Excel Spreadsheet CSV Text File XML File (11 kb)

View All

Row	Expense Report	Report Description	Employee ID	Name	Expense Date	Line	Dist Line	Expense Type	Ticket Number	Distance	Merchant	Line Description	GL Unit	Oper Unit	Department	Fund	Account Class	PC Bus Unit	Project	Activity	Cost Share	Expense Line Amt	Created On	Travel Auth ID	Advance ID	Amount Applied	Distribution Status	Location	Acctg Date	
1	Expense Report - December2023	3000171642	N13223100	Drummond,Samuel	12/08/2023	1	1	LAB SUPPLIES		0.00	STAPLS7620519503000001	Pipe Cleaners: Creativity Street Regular Stems, White, 12" x 4 mm, 100/Pack, 12 Packs	USC01	CL040	155100	F1000	53025	202	USCSP	10012779	1		33.150	01/12/2024				Distributed		01/16/2024
2	Expense Report - December2023	3000171642	N13223100	Drummond,Samuel	12/11/2023	2	1	LAB SUPPLIES		0.00	CHROM TECH INC-ECOM	2 of: VESPEL FERRULE PKT10.	USC01	CL040	155100	F1000	53025	202	USCSP	10012324	1		139.400	01/12/2024				Distributed		01/16/2024
3	Expense Report - December2023	3000171642	N13223100	Drummond,Samuel	12/08/2023	3	1	LAB SUPPLIES		0.00	ACOS ENTERPRISES LLC	9 of: Stainless Steel Swagelok Tube Fitting, Bulkhead Reducing Union, 1/4 in. x 1/8 in. Tube OD.	USC01	CL040	155100	F1000	53025	202	USCSP	10012324	1		246.380	01/12/2024				Distributed		01/16/2024
4	Expense Report - December2023	3000171642	N13223100	Drummond,Samuel	12/11/2023	4	1	OTHER SUPPLIES		0.00	SIGMAALDRICH US	3 of: PRASEODYMIUM(III) NITRATE HEXAHYDRATE.	USC01	CL040	155100	F1000	53009	202	USCSP	10012397	1		1689.280	01/12/2024				Distributed		01/16/2024
5	Expense Report - December2023	3000171642	N13223100	Drummond,Samuel	12/12/2023	5	1	LAB SUPPLIES		0.00	SIGMAALDRICH US	N-HEXANE EMPLURA® 2,5 L.	USC01	CL040	155100	J1000	53025	202	USCSP	10012848	1		139.410	01/12/2024				Distributed		01/16/2024
6	Expense Report - December2023	3000171642	N13223100	Drummond,Samuel	12/01/2023	6	1	LAB SUPPLIES		0.00	MCMaster-CARR	Lines 1 - 8: Different size fittings for stainless steel tubing. Lines 9 - 10: Low-friction tape and pipe insulation.	USC01	CL040	155100	F1000	53025	202	USCSP	10012779	1		781.380	01/12/2024				Distributed		01/16/2024
7	Expense Report - December2023	3000171642	N13223100	Drummond,Samuel	12/01/2023	6	2	LAB SUPPLIES		0.00	MCMaster-CARR	Lines 1 - 8: Different size fittings for stainless steel tubing. Lines 9 - 10: Low-friction tape and pipe insulation.	USC01	CL040	155100	F1000	53025	202	USCSP	10012324	1		50.320	01/12/2024				Distributed		01/16/2024



Grant Dashboard – How to Use the Burn Rates

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
TOTAL EXPENSE	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34
BURN RATE	(dollars)	6,696.15	5,033.76	COST SHARE RATIO			62.49%	46.01%	
	(%)	4.18%	75.17%						

- Burn Rates can be used to see the rate at which Budget is being spent.
 $\text{Total Budget/Life of Project} = 160,038.00 / 23.9 \text{ months} = 6,696.15$
- Can assist with the development of a spending strategy at the beginning and throughout an award.
 $\text{Date} = 95,641.50 / 19 \text{ months} = 5,033.76$

- Remember: Be mindful of the timing of purchases on your awards.

- Purchasing large pieces of equipment, tuition expenses, etc. can cause spending spikes and the rates to be skewed.
 $\text{Monthly Budget Burn Rate} = \frac{\text{Life to Date Monthly Burn Rate}}{\text{Monthly Budget}} = \frac{5,033.76}{6,696.15} = 75.17\%$



Inactive Project

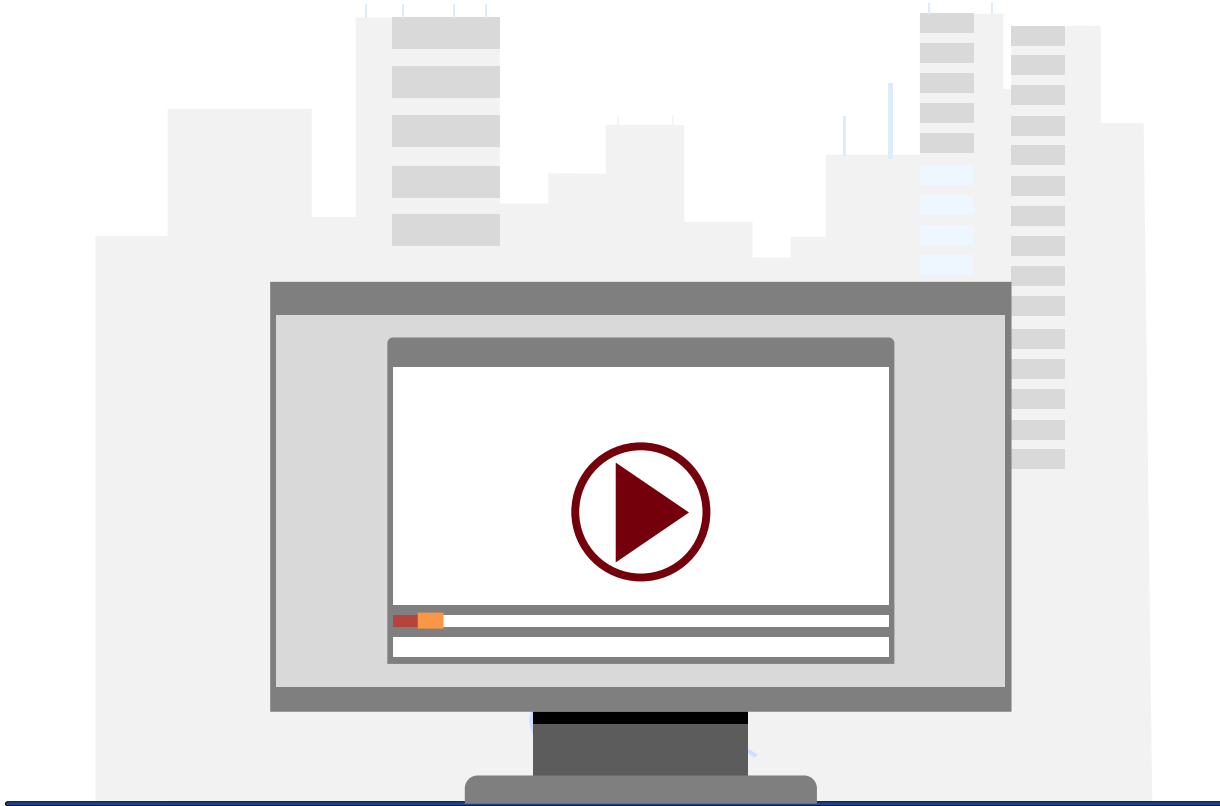
10011832				*INACTIVE*
SC CCR&R PDG Family		SC Dept of Social Services	CON0005687 4400026259	04/30/2022-04/29/2023 [12 months]
Operating Unit	Department	Fund	Class	
CL039 EDUCATION	152200 COE CHILD DEV RESEARCH CTR	G1000 STATE GRANT	301 COMMUNITY SERVICE	
PROJECT TEAM				
Role	Name	USCID	Email	
BM	Judge,Tara M		judgetm@mailbox.sc.edu	
CGA	Koon,Denise Frick		ddkoon@mailbox.sc.edu	
PI	McDonald,Melissa Jane		mm116@mailbox.sc.edu	

- Inactive projects will return as yellow.



Demonstration

- Using the Grant Dashboard



Grant Dashboard Key Take-Aways

- **Fiscal Period** always defaults to current period.
- **Project Status** always defaults to active.
- The PI Field will default to your user ID.
- Use the Summary and Detail Output options to view more data.
- **Display Account Chartfield** checkbox will show all account information.
- Balance equals the Budget minus the Life to Date Expenses.
- Look at Cost share, the portion of project costs not provided by the sponsor.
- Remember, most sponsors expect cost share to be charged in **ratio** throughout the life of the project.
- All expense questions should be routed through the Business Manager.
- This is the preferred tool when reviewing grants (USCSP projects 100xxxxx).



Helpful Tips and Resources



UNIVERSITY OF
South Carolina

Some Helpful Tips

- The information in the Grants Dashboard should match the invoice created in Finance PeopleSoft unless a Sponsor requires the use of own invoice template.
- Important to reconcile and finalize all expenses within **30 days of the project end date**. (The only exception would be for sub awards that may have 60 days to issue their final invoice.)
- Regularly review salary and effort and make any necessary adjustments timely.
- Remember **Encumbrances reduce** your available balance as they are obligations.
- Review Encumbrances regularly and work with your Business Manager to de-obligate and closeout encumbrances as needed to ensure access to available funding.
- Remember to be responsive to your Business Manager when they reach out about milestone completion as this affects invoicing.



Common Issues

- Overbudget – Projects that are overbudget cannot be invoiced until rectified.
- ADVANCE/RISK Accounts cannot be invoiced; be aware of timing for project continuations.
- Must be based on actual expenses that the department posted to the ledger during the fiscal period; cannot make manual adjustments
- Expenses must fall within the period of performance. For example, equipment purchases should not be made a few days before a project ends or after it has ended.
- Cost share must be booked appropriately and within ratio to spending.
- For projects that have ended; final expenses must be confirmed timely so **Final invoices** can be prepared and submitted (within 30 days of end date).



Office of the Controller

Office of the Controller

General Accounting

 Grants and Funds
 Management

 Compliance and Tax
 Management

Payroll Department

 Operational Management
 and Reporting

 External Financial Reporting
 and Transparency

 Resource and Training
 Toolbox

Business Manager

Grant Administration

 ➤ **Principal Investigator**

Policies & Procedures

Forms

Newsletters

 PeopleSoft Finance Training
 Schedule

Listservs

Social Media

Contact Us

Principal Investigator

A *Principal Investigator* or *PI* is the individual responsible for the preparation, conduct, and administration of a research grant.

Below is a list of tasks a Principal Investigator may be responsible for as the administrator of a research grant. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our PROJECTPI listserv end of January and in a prior week reminder email. On demand training can be found in the sections below.

Close Out Matrix

Expand all



Cost Share



Cost Transfers



Introduction to Grant Management



Milestone Notifications



Monitoring Awards

Monitoring Awards



No Cost Extensions

Procurement

Project Team

Retro Funding Change

Risk Accounts

Salary Allocations

Sponsored Award Roles and Responsibilities

Subrecipients

Time and Effort Reporting

Workflow

Cost sharing occurs whenever any portion of project's costs is provided at USC's expense rather than the sponsor. Most sponsors expect cost share to be charged in ratio throughout the life of the project. All cost sharing commitments must be listed in the budget and identified in USCeRA.

The below training resources are available:

- Use the Grant Dashboard (www.admin.sc.edu) to access detailed expense data.
- [How to Use the Grant Dashboard Presentation \[PDF\]](#)
- [How to Use the Grant Dashboard Demo Video](#)
- [How to Use the Grant Dashboard - Job Aid \[pdf\]](#)

System: Finance Intranet

Contact: Your Post Award Accountant (PAA)

Where to Find Resources

For Grant Dashboard resources, visit the Monitoring Awards section on our [Principal Investigator](#) page.



Contacts

10012715		CON0006754	09/08/2022-08/31/2024
Addressing Rural Cancer Disparities via Proactive	Medical University of South Carolina	A23-0073-S002, 1R01CA268023-01A1	[23.7 months]
Operating Unit	Department	Fund	Class
CL034 PUBLIC HEALTH	115070 RURAL AND MINORITY RESEARCH	F1000 FEDERAL GRANT	202 INDIVIDUAL AND PROJECT RSRCH
PROJECT TEAM			
Role	Name	USCID	Email
BM	Godbold,Janie R		godboldj@mailbox.sc.edu
CGA	Grady,Sylvira LaToya		gradysl@mailbox.sc.edu
KEY	Chen,Brian Ken		bchen@mailbox.sc.edu
PI	Hung,Peiyin		hungp@mailbox.sc.edu

If you have any questions regarding expenses or invoicing, please contact your Business Manager (**BM**) or Post Award Accountant (**CGA**).

Controller's Office Contact List

General Accounting (JEs, JVs, Apex, GL issues/Questions)	Email Address
General Email Address	genacctg@mailbox.sc.edu
Cash Advance Settlement	cashadvc@mailbox.sc.edu
Payroll Retro Journal Entries	retroje@mailbox.sc.edu
Chartfield Maintenance	cfmaint@mailbox.sc.edu
Moving & Relocation Mailbox	moving@mailbox.sc.edu
PeopleSoft Finance Security Requests	pssecure@mailbox.sc.edu
Accounts Payable	Email Address
General Email Address	ap@mailbox.sc.edu
AP Uploads	apupload@mailbox.sc.edu
Supplier Maintenance	apsupplr@mailbox.sc.edu
Travel Office	Email Address
General Email Address	teoffice@mailbox.sc.edu
Student/Non-employee Travel Authorizations and Travel Reimbursement Vouchers	tesubmit@mailbox.sc.edu

Controller's Office Contact List

Capital Assets	Email Address
Physical Inventory	physinv@mailbox.sc.edu
Cash Management and Treasury	Email Address
General Treasury Email Address	treasury@mailbox.sc.edu
Business Expense Card	cards@mailbox.sc.edu
Team Card	teamcard@mailbox.sc.edu
Travel Card	trvcard@mailbox.sc.edu
Compliance and Tax	Email Address
General Compliance Email Address	concpl@mailbox.sc.edu
General Tax Email Address	tax@mailbox.sc.edu
Research/Development Sales/Use Tax Exemptions	rdequip@mailbox.sc.edu
Time and Effort Reporting	timeandeffort@sc.edu

Controller's Office Contact List

Grants and Funds Management	Email Address
Sponsored Award Specific Questions	Contact your Post Award Accountant (PAA)
Payroll	Email Address
General Email Account	payroll@mailbox.sc.edu



Questions



UNIVERSITY OF
South Carolina

THANK YOU!

Office of the Controller



Alone, we can do so little; together,
we can do so much.



Address:

1600 Hampton Street
Columbia, SC 29208



Contact Number:

Phone: 803-777-2602
Fax: 803-777-9586



Email Address:

controller@sc.edu



UNIVERSITY OF
South Carolina



UNIVERSITY OF
South Carolina