Bookkeeper Meeting

JUNE 19, 2019
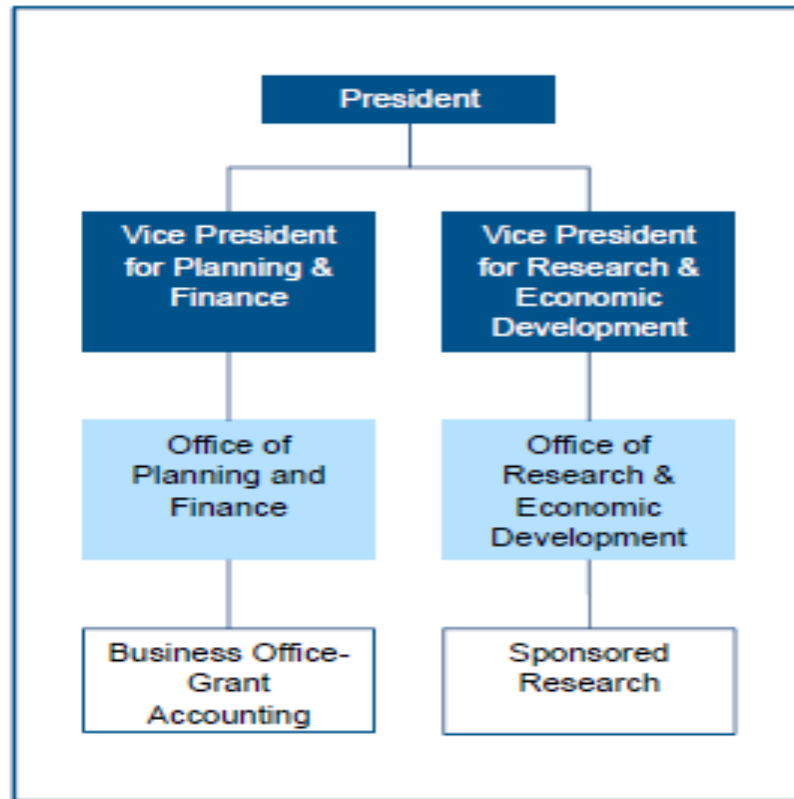
Monthly Meetings Overview

The monthly bookkeeper meetings will focus on what resources Grant Accounting can provide to enhance our support of, reporting to, and communication with YOU in your role as bookkeeper.

Because sponsored research at TTU is managed by two offices, some overlap does occur between the Office of Research and Grant Accounting within the Office of Planning & Finance. Grant Accounting's mandate is to manage all post-award financial related aspects of sponsored projects.

Representatives from the Office of Research will be invited to these monthly meetings so if questions arise on the pre-award side, you will have a resource.
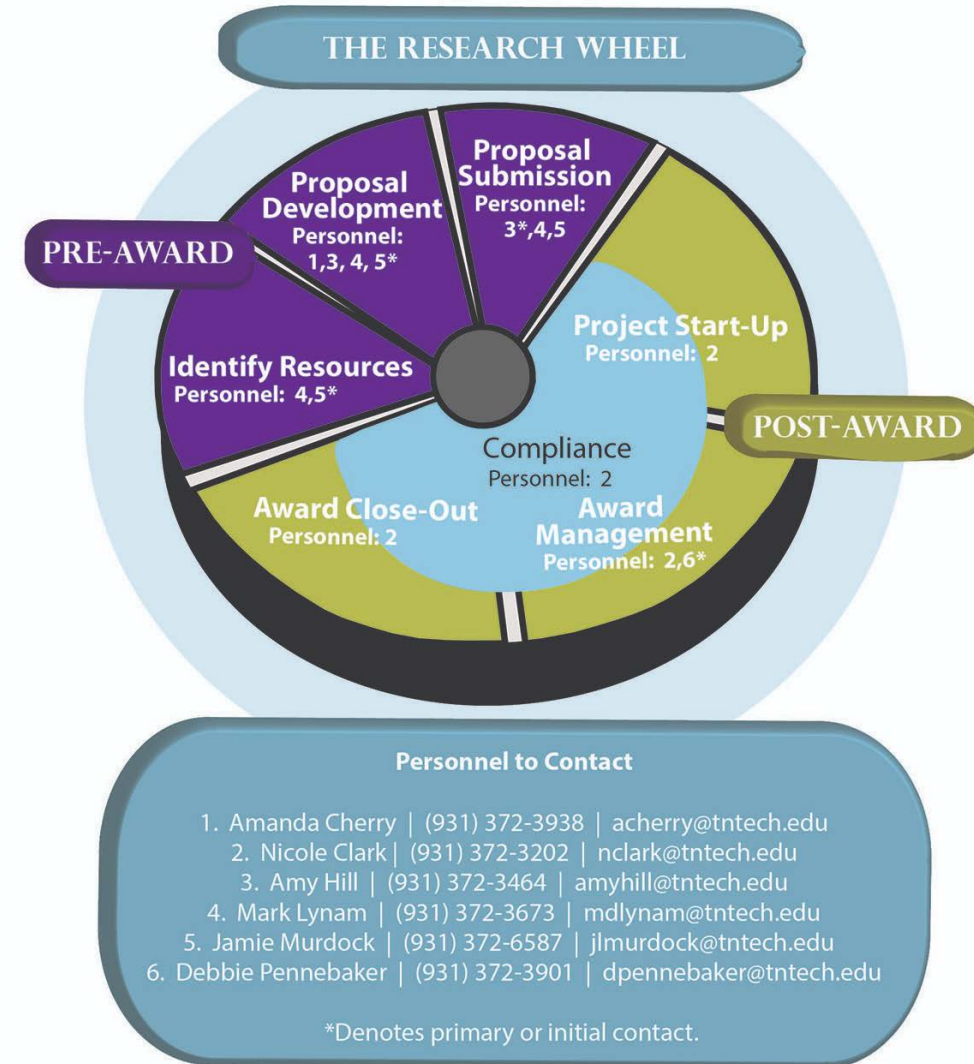
Organizational Structure & People
TTU Research Administration Governance Structure

President

Vice President for Planning & Finance

Vice President for Research & Economic Development

Office of Planning and Finance

Office of Research & Economic Development

Business Office- Grant Accounting

Sponsored Research

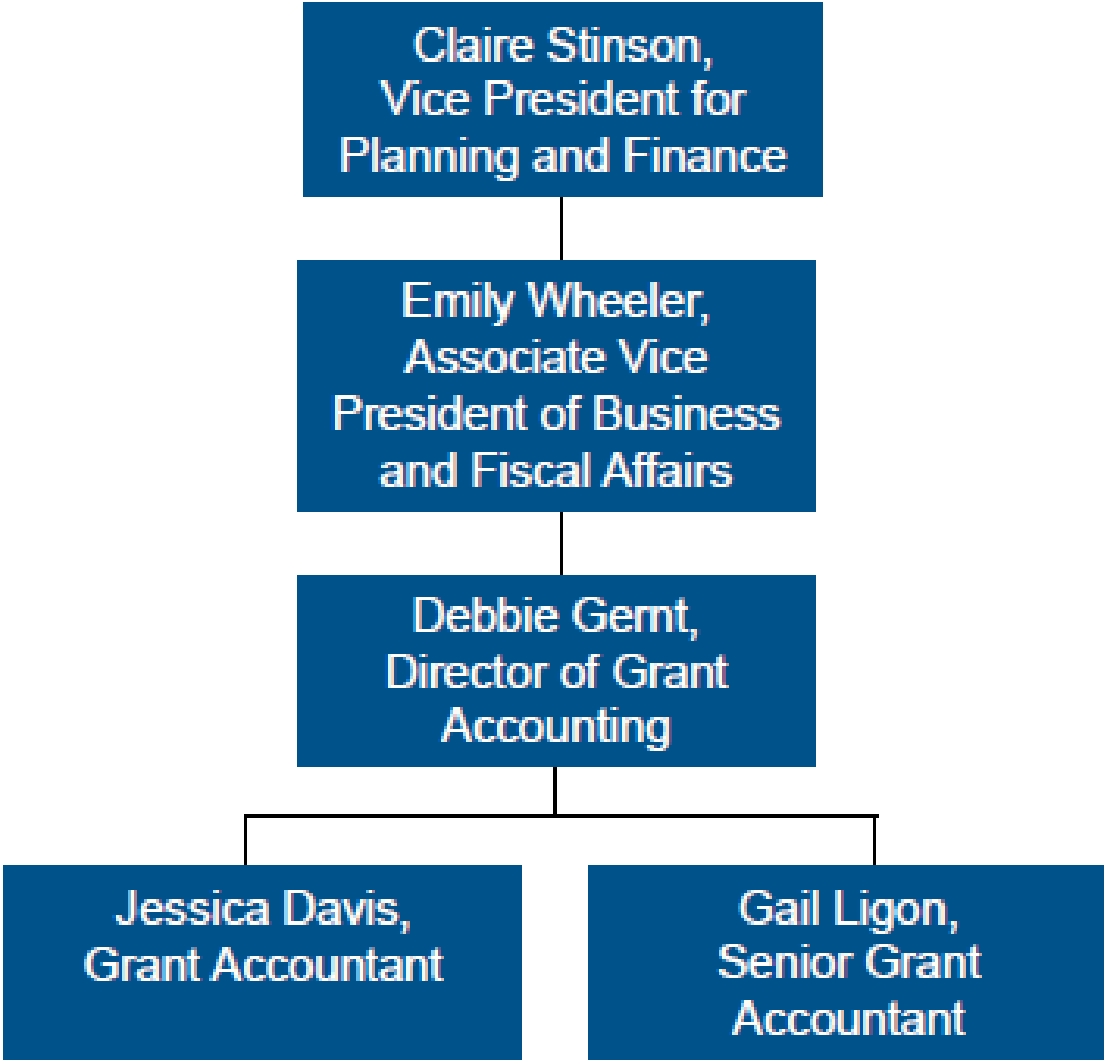| Description	Office of Research and Economic Development reports to the VP for Research and Economic Development and is responsible for pre-award and non-financial post-award administration. Grant Accounting reports to the Office of the Vice President for Planning and Finance and oversees financial post-award administration.
Benefits	• Enables oversight of the functions that are more closely aligned with primary responsibilities of each office. • Traditional structure, well understood in the industry. • Promotes appropriate financial controls.
Challenges	• Gaps in communication between offices have resulted in a lack of coordination in several areas, such as training and issue resolution. • No single point of contact for research administration at the institution, especially for Bookkeepers who provide transactional level support.

Office of Research – Pre-Award

Please note that effective June 7, 2019, Debbie Pennebaker is no longer with the Office of Research. The position is currently posted and the website will be updated when filled.

THE RESEARCH WHEEL

PRE-AWARD

Proposal Development
Personnel: 1,3, 4, 5*

Proposal Submission
Personnel: 3*,4,5

Identify Resources
Personnel: 4,5*

Project Start-Up
Personnel: 2

POST-AWARD

Compliance
Personnel: 2

Award Close-Out
Personnel: 2

Award Management
Personnel: 2,6*

Personnel to Contact

1. Amanda Cherry | (931) 372-3938 | acherry@tntech.edu
2. Nicole Clark | (931) 372-3202 | nclark@tntech.edu
3. Amy Hill | (931) 372-3464 | amyhill@tntech.edu
4. Mark Lynam | (931) 372-3673 | mdlynam@tntech.edu
5. Jamie Murdock | (931) 372-6587 | jlmurdock@tntech.edu
6. Debbie Pennebaker | (931) 372-3901 | dpennebaker@tntech.edu

*Denotes primary or initial contact.

Office of Planning & Finance – Grant Accounting – Post-Award

Grant Accounting Organizational Chart

Claire Stinson,
Vice President for
Planning and Finance

Emily Wheeler,
Associate Vice
President of Business
and Fiscal Affairs

Debbie Gernt,
Director of Grant
Accounting

Jessica Davis,
Grant Accountant

Gail Ligon,
Senior Grant
Accountant

Contact Info - Grant Accounting Staff

Debbie Gernt, Director, dgernt@tntech.edu, x-3026

Gail Ligon, Senior Grant Accountant, gligon@tntech.edu, x-3312

Jessica Davis, Grant Accountant, jessicadavis@tntech.edu, x-3025

Any one of us will be happy to help you. If we can't answer a question, we will get you to the right person or find an answer for you! Please don't hesitate to call or email.

Contacts – Broad Subject Areas

Debbie
- Grant Activations
  - New FOAPALs
  - Extensions
  - Additional money
- Budget Revisions
- Record Retention

Gail
- Invoicing
- Time & Effort
- Labor Distribution
- Award Closeout

Jessica
- Eagle Buy
- Restricted Accounts, includes allotment of program income
- Invoicing for testing accounts

Year-End Deadlines - June

6/14/19 – All activations for new projects beginning July 1 should be submitted to the Office of Research by this date to ensure that the FOAPAL is available by July 1.

6/14/19 – All restricted accounts with a negative balance need to be resolved.

6/14/19 – All cost transfers for grant accounts should be submitted.

6/14/19 – Reallocations for May/June 2019 must be submitted to payroll to ensure they are processed prior to June 30, 2019.

6/15/19 – Suggested final transaction (purchase) date.

6/21/19 – All time and effort reports due to Grant Accounting.

6/28/19 – All activations for continuing grants that need funds activated as of July 1 should be submitted to the Office of Research.

6/30/19 – Ensure that all transactions are processed against grant accounts, with particular attention to grants closing on June 30.

Year End Deadlines - July

7/6/19 – All procard transactions with posting dates of May 16 – June 15 must be reallocated, submitted, and approved in Chrome River.

7/11/19 – For all procard transactions with posting dates of June 16 – June 30, you will have through this date to make reallocations. Transactions will post 7/12/19. Any corrections must be requested by **July 15, 2019**.

7/11/19 – All invoices received prior to this date for goods and services received on or before 6/30/19 must be entered into Eagle Buy and have all necessary approvals completed by 4:30 pm.

7/12/19 – Any invoices received prior to this date for goods and services received on or before 6/30/19 will be recorded as an expense in FY19. If received on 7/12/19, the invoices must be entered into Eagle Buy and have all approvals completed by 3 PM.

7/12/19 – All claims for travel ending on or before 6/30/19 must be approved and received in Grant Accounting.

Note – if any invoices are received after 7/12/19, for goods and services received on or before 6/30/19 that total more than $5,000, please notify Grant Accounting and Accounts Payable. This will likely pertain to some grants that have subawards.

Feedback for Future Training

Training is different than monthly meetings. These monthly meetings will be for feedback and discussion while training will be more structured and focused on one particular subject.

What type of training would you like to see?
- Banner 9 – grant screens
- Time & Effort Reporting
- Chrome River and Procards (would be done by General Accounting)
- "Life Cycle of a Grant - Boot Camp" to include joint training by the Office of Research on pre-award and Grant Accounting on post-award.
- Other

Goals of Grant Accounting

Establish a web presence to share relevant content with bookkeepers and the research community as a whole. Partner with the Office of Research to develop cross-references between the Office of Research website and Grant Accounting.

In collaboration with the Office of Research, implement a comprehensive training program with reference materials for principal investigators and bookkeepers. Develop additional formats to promote greater training coverage. For instance, offer web based training modules.

Address and clarify concerns of faculty and bookkeepers that existing reports are not delivered at a regular frequency and must be requested from the Business Office.

◦ Report formats
◦ Shadow Systems
◦ User-Friendly

Contact Info – Grant Bookkeepers

CENTERS OF EXCELLENCE				
Fenlon	Barbara	Power Center	bfenlon	3615
Garrison	Sandy	Water Center	sgarrison	6369
Henry	Suzanne	Manufacturing Center	henry	3630
Milum	Anysa	Manufacturing Center	amilum	3506
Staggs	Etter	Power Center	estaggs	3599
Stallion	Phyllis	Manufacturing Center	pstallion	3099
Warren	Karen	Water Center	kwarren	3507
Wiegand	Darlene	Manufacturing Center	dwiegand	3362
DEPARTMENTS				
Faulkner	Kathy	Curriculum & Instruction	kfaulkner	3458
Harris	Betty	Biology	bharris	3094
Honeycutt	Elizabeth	Counseling & Psychology	ehoneycutt	3457
Kreis	Linda	Physics	lkreis	3483
Mathis	Cindy	Agriculture	cmathis	3612
Norman	Tina	Chemistry	tcnorman	3184
Walls	Donna	Civil & Environmental Engineering	dwalls	3455
Willis	Shellie	Human Ecology - TECTA	swillis	6561

COLLEGES				
Looper	Alisha	College of Education	adlooper	6538
Miller	Robin	College of Interdisciplinary Studies	rcmiller	3395
Nisbet	Matt	College of Business	mnisbet	3655
Rice	Lisa	College of Ag & Human Ecology	lrice	3149
Smith	Donna	College of Engineering	dlsmith	3828
Way	Denette	College of Education	dway	3177
OTHER				
Brewer	Julie	ICube	jbrewer	3318
Dangelo	Jen	Small Business Development Center	jdangelo	6545
DeBord	Jill	STEM Center	adebord	6531
Dyer	Michael	Craft Center	mrdyer	6888
Eads	Shana	Facilities	seads	3226
Gallop	Amanda	Office of Research	agallop	3938
Gunnels	Debbie	Child Development Lab	dgunnels	3905
Hatley	Christina	STEM Center	ehatley	6598
Henry	Susan	Dean of Students	shenry	3123
Richardson	Lana	Cybersecurity Center	lgrichardson	3519
Scarborough	Stephanie	ICube	sscarborough	6383