

MANAGING YOUR GRANT

Congratulations on receiving your grant!

If you have been awarded a new grant from an external funding source, please contact Michelle Scott, Accountant/Grant Specialist, who will help you with the following:

1. **General Ledger Account Numbers:** The grant money will be placed in a newly assigned general ledger account used specifically for the grant's financial record keeping. You will need a set of account numbers to be used for spending that are consistent with the approved budget for the grant. Working with the Director of Budgets, Grants will assure that the accounts are set up in a manner that will make managing your grant easier.
2. **Access to Datatel General Ledger Accounts:** Since you will be responsible for managing your own spending, you and/or an assistant will need access to these accounts in Datatel. With proper access, you will be able to view your account, print reports and monitor amounts available for each line item within your grant. If you and/or your assistant do not have access to the Financial System in Datatel, email the Help Desk for instructions. If your assistant will be accessing Datatel on your behalf, you will also need to email Wendy DiMaio, Director of Accounting to give that person account access to your grant. Please provide the Director of Accounting with the person's name and the account numbers for your grant.
3. **Datatel Training:** If you and/or your assistant are unfamiliar with the Financial System in Datatel, the Director of Budgets, Grants can provide the necessary training. Email the Director of Budget, Grants to request an appointment. Please note that it is necessary to already have your accessibility to Datatel in place for the training session.
4. **Time & Effort Reports:** If you have received a federally funded grant, Time & Effort reports will need to be completed by all personnel working on the grant. Faculty and staff members are required to complete a report once per semester. Students are required to complete one on a monthly basis.
5. **Grant Reports:** Most grants require reporting at certain intervals. You will need to be aware of the grant report due dates. You will be responsible for writing all technical and progress reports and submitting them by the required due dates. The Director of Budgets, Grants will provide any required financial reports that are needed to accompany your reports.
6. **Spending:** If you do not currently have spending authority, it will be necessary to complete an Authorized Spending Limits form for yourself and/or your assistant. Please send the completed form to Nancy Montez, Director of Purchasing. If no authorization for spending is on file with the Finance Office, the Chair of your department or the Dean will have to sign off on all of your expenditures.

For non-payroll expenditures, you will need the check request form and travel expense report. Make sure to obtain a current version of the travel expense report since the personal auto mileage rate changes every year effective January 1. An electronic version is also available from the Director of Budgets, Grants. Completed check requests and travel expense reports should be forwarded to Michelle Scott in the Finance Office for processing.

Office of Sponsored and Undergraduate Research - Valparaiso University
It would be advisable to familiarize yourself with the current Travel Policy, which can be found at https://www.intra.valpo.edu/provost/travel_policy/index.php. Please note that all travel expense reports need to be co-signed by your supervisor, even if you have your own signing authority.

7. Matching Costs & Cost-Sharing: Matching costs (also called cost-sharing) are the University's contribution to the project and are usually a required element of most Federal grants. Matching costs can either be in the form of actual money or in-kind dollars. If the match is in actual money (funded by either donations or University funds), you will need to make arrangements for accessing these funds. If the match is in-kind dollars (represented by such things as release time, housing for students, indirect costs, etc.), you will need to document the detail of the arrangement or expenditure since matching costs usually need to be reported to the funding agency.

8. Budget Changes: You will need to be aware of any requirements by the funding agency for over-spending the line items of the grant. At times, it may be necessary to request the funding agency to approve a budget change to reallocate funds from one line item to another.

There are certain limitations in the Datatel system concerning compensation. For example, you may have employee compensation budgeted in various line items specific to your grant that will be paid under payroll accounts in the Datatel system. This will cause reports in Datatel to look different from your grant budget. You should work with the Director of Budgets, Grants to make sure these funds are reported correctly to the funding agency.

9. Compensation: If there is payroll budgeted in your grant, you will need to know and comply with the correct procedures involved with hiring and authorizing stipends.

a. Authorizing Faculty stipends: If your grant provides a stipend for a faculty member, please email the request to the Executive Assistant to the Provost who will forward it to payroll. You will need to specify whether this payment is subject to full or partial benefits. Partial benefits do not include Health, Retirement, Life or Disability benefits.

b. Hiring Student Aides: Complete the On-Campus Student Employment Job Description Form so the position needed for the grant can be set up in Datatel. You also need to complete the Student Employment Request Form to hire the specific student(s). This is a 4-part form supplied through the [Human Resource Department](#). These forms must be submitted to the Financial Aid Office so they can determine if the student qualifies for Federal Work Study. If the student has not been previously employed through the University, he/she will need to visit the Human Resources office to complete additional paperwork.

c. Hiring Temporary, Part-time or Full-time Employees: To hire a temporary, part-time or full-time employee, you will need to complete the Notice of Employment form (contact the [Human Resource Department](#)). If the person has not been previously employed through the University, he/she will need to visit the Human Resources office to complete additional paperwork. Please note that students who will be working during the summer and not enrolled in a class will be classified as

Office of Sponsored and Undergraduate Research - Valparaiso University
temporary employees, not student aids, and therefore will be subject to
normal tax withholding and your grant will in turn be charged with benefits
at the stipend rate, not the student aid rate.

10. The End of the Grant: Upon completion of your grant, you will need to submit final reports to the funding agency. Most grants require final technical and financial reports. Most federal grants require additional closeout reports. Your grant agreement should specify which reports are needed. The Director of Budgets, Grants can help you with these final reports.

If you have been paying temporary, part-time or full-time employees from your grant, you will need to complete a Change of Information form (contact the [Human Resource Department](#)) in order to terminate or discontinue payments for these employees. If you have been paying a student, use the Student Change of Status Form to terminate or discontinue payments.

Additional Information

[VU Change of Information Form](#)

[VU Notice of Employment Form \(PDF\)](#)

[Internal Grant Instructions](#)

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