

Grant Management

PURPOSE

Grants are external funding opportunities that advances Broward College’s vision, mission and Strategic plan. Grants can supplement financial resources to provide seed funding for programs, staff and equipment. The purpose of this job aid is to assist grant managers in gaining knowledge and understanding of Grants Management - Post award process setup in Workday.

The [Office of Grants Development](#) supports the grants development process from initial planning and proposal development through project completion; and acts as the intermediary with granting agencies for proposal writing, grant submission, post-award activities such as No-Cost Extensions, Carry-Over funds, Change in Key Personnel, Project Budget Modification, Programmatic start-up and Program compliance issues. Generally, when a grant is awarded, the office continues to provide ongoing program support and guidance on Program compliance and grants management to the grant managers.

Please [contact](#) the Office of Grants Development if you are interested in pursuing a grant to support your project or program. (Attribution: Grants Dev webpage).

Note: Grants normally follow the college’s Procurement, Budgeting, Human Resources, Accounts Payable and Payroll Policies and Procedures. The fiscal procedures and guidance of award’s terms and conditions are managed by Grants Accounting in conjunction with the Project Director and the office of Grants and Development. All Grants are established in Workday by [Grants Accounting](#) office. For questions or concerns, please contact the Grants Accounting Manager in the Business office.

GRANT ACCOUNTING TASKS IN THIS JOB AID

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Grant Management

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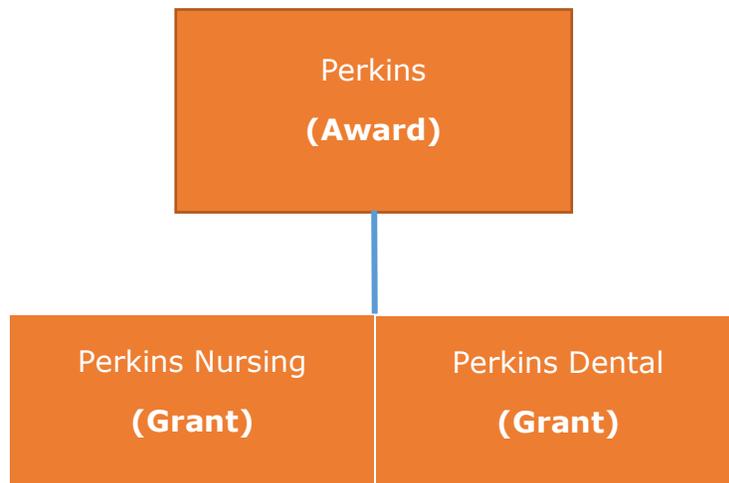
Difference between Award and Grant

Award and Grants have a parent child relationship in Workday. Award (parent) is at the top level and represents the sponsor and can have one grant or many grants rolling up to it; Grant (child) resides within the award and is used as a worktag in Workday to route the business processes and to collect information for reporting purposes. The Grant hierarchy for the Award is created to allow the grant managers to report on all of the award lines.

Grant Hierarchy = Award Number (AWD-XXXXXX)

Grant = Grant ID (GR000XXX)

Example: Perkins is an award and Perkins Nursing and Perkins Dental with many other Perkins grants roll up to it.



How an Award is created in Workday?

When an award is granted, the Office of Grants Development informs the requestor and the Grants Accounting department. Grants Accounting then creates the Award in Workday; In order for the Grants Accounting department to create an award in Workday, Grants Accounting Manager must receive the following information:

1. Name of the person who will be managing the Award (Grant Manager)
2. Cost Center/Pathway that will be associated with the grant for proper business processes to route
3. Program/Pathways – For example, if program/pathway support – Nursing; Student Support, Tutoring etc.,
4. Copy of approved budget
5. Executed copy of grant contract (approved by legal)

Once the award is created in Workday, Grant Manger will receive an email with the Grant name, Grant ID, and worktags along with a time and effort report template, if required. The time and effort report is required from anyone whose payroll expense is paid, in part or fully, by grant funds. This includes grant managers and program managers and principle investigators. All reports must be approved by the manager and forwarded to the Grants Accounting department every month.

Grant managers are responsible in ensuring that all the grant related transactions have correct worktags and are promptly submitted in Workday for processing.

Examples:

- ✓ An expense report for mileage reimbursement must be submitted within the same month the travel occurred.
- ✓ P Card transactions must be reconciled promptly to be processed in timely manner

Additionally, grant managers can view the business process of transactions to monitor the progress and approval for the transaction.

Note: If a transaction has been processed with incorrect worktags, notify the [Grants Accounting](#) manager immediately to submit a [journal entry](#) on your behalf.

Hiring for a Grants Position

The hiring process is the same regardless of the type of position being filled. This process is initiated by the manager of the supervisory organization in which the new position will reside. Refer to the applicable job aid listed below to complete the hiring process:

[Create Job Requisition](#)

[Hiring for a Full-time Advertised Position \(No Search Committee\)](#)

[Hiring for a Full-time Advertised Position \(With Search Committee\)](#)

[Hiring for a Non-Advertised Position](#)

[Hiring for a Part-time Advertised Position](#)

[Add Additional Job](#)

How to Pay Supplements with Grants Funds?

In the event a BC employee receives a stipend or other one-time-payment from grant funds, they must sign a project contract that includes a scope of work and is counter-signed by the grant manager as completed. Grant managers can ask the sponsor if they have a preferred project contract or create their own. Completed project contract must be forwarded to the Grants Accounting office.

A One-Time Payment is used to compensate employees for a compensation plan type that is paid one time, such as supplements. Refer to [Request One-Time Payment](#) job aid for detailed step by step guide on how to submit this request in Workday.

Job Transfers and Terminations

The job transfer and termination processes are the same regardless of the type of fund. Refer to the applicable job aid listed below to complete the applicable process:

[Initiate a Transfer, Promotion/Demotion or Change Job in Workday](#)

[End Additional Jobs](#)

[Terminate Employee](#)

Costing Allocation on a Grant

If the funding for a grant is to be split between cost centers, grant manager must convey this information to the budget and grants accounting departments via [email](#) to request cost allocation. The email must include cost centers to split the funding between and the effective date.

Note: Hiring manager may also include this information in the comments section in Workday when hiring for the grants.

Obtaining Payroll Details for Grant Employees

Grant managers can obtain the payroll detail report for grants employees to view specific details related to grant expenses through [Grants Accounting](#) department.

Requesting a Journal Entry to Transfer Salary Expense

A journal entry is used to transfer salary expense when the expense is posting to the wrong ledger account or cost center. A journal entry transfers expenses between accounts after they have run through the payroll system. This adjustment could occur for a number of reasons, including:

- An employee was hired to work on a grant before the grant was established in Workday and wages were initially posted to another account
- Incorrect worktags selected when requesting a position in Workday
- Incorrect worktags selected for payroll, travel and grants related supplies

All grants related journal entries are processed through the Grants Accounting office. Please [contact](#) the Grants Accounting office to generate appropriate journal entries to transfer salary expenses.

Grants Equipment

Purchasing services, supplies and equipment with grant funding may be subject to both Broward College policies and the policies of the funder.

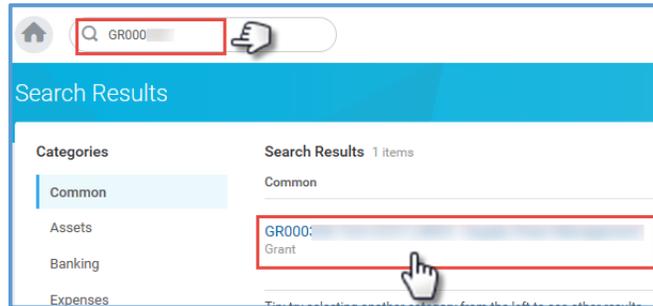
Grant equipment belongs to the grant and when a grant closes the equipment is kept separate to determine the value held for the grant to support the program. Therefore, it is very important that the equipment is tagged properly and has a BC tag, an asset tag and a manager tag.

Viewing Worktags and Award Balance in Workday

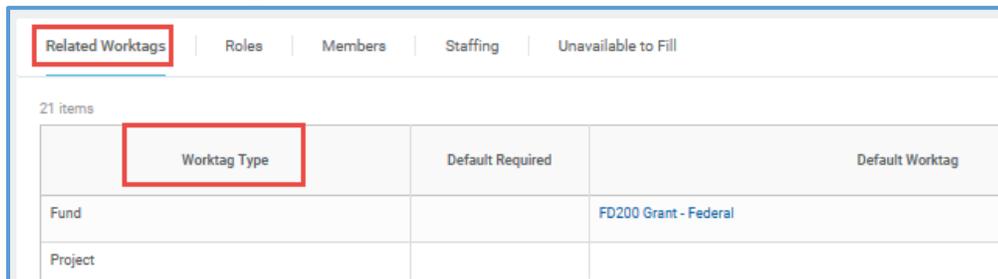
Please note that only authorized users have access to viewing worktags and award balance in Workday.

Step 1 Login to Workday

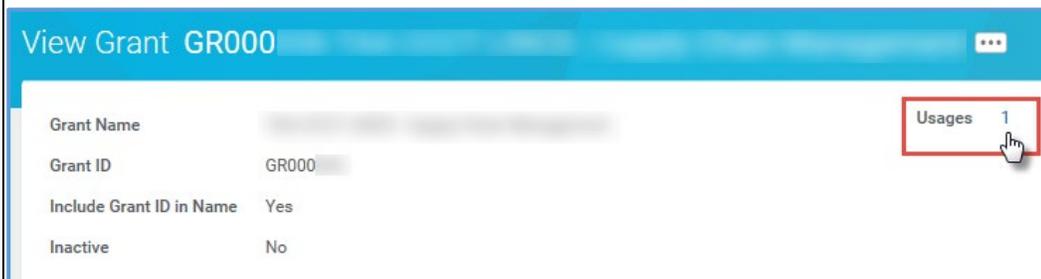
Step 2 Type the Grant ID in the search field and press enter. Click on the Grant



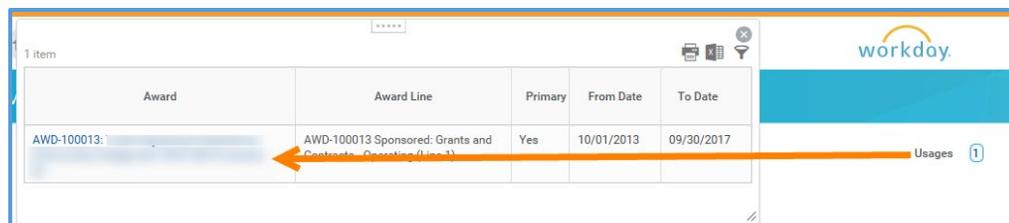
Step 3 The *View Grant* screen appears displaying pertaining information related to the Grant. Click on the *Related Worktags* to view the associated worktags to the Grant



Step 4 Click on the number (blue hyperlink) listed by **Usages**

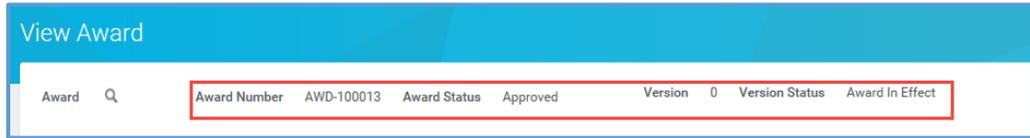


Step 5 Another window will appear, click on the blue award hyperlink under the **Award** column



Step 6

The *View Award* screen appears with the Award number, Award Status, Version status and all other award details



Note: Version status only updates if the award is amended. An Amendment is reserved for changes to the award such as an extension for another year.

Step 7

Scroll down to the *Award Line Summary* tab

Column	Displays
Cost Reimbursable Scheduled, In Progress, and Ready to Bill Amount	The amount that is outstanding and is ready to be billed by the Grants Accounting department. Grants manager can click on this amount (blue hyperlink) to see details for each transaction

Line	Line Number	Grant	Revenue Category	Line Type	Line Status	Line Amount	Billing Schedule	Cost Reimbursable Scheduled, In Progress, and Ready To Bill Amount
Q	1	GR000:	Sponsored: Grants and Contracts - Operating	Cost Reimbursable	Active	12,945,003.21	U.S. Department of Labor ETA	36,658.91

Billed Amount	The Customer Invoices that have been created of the transaction. Grants manager can click on this amount (blue hyperlink) to see details for each transaction
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Customer	Invoice	Invoice Date	Billed Amount	Total Invoice Amount	Billed Amount	Cost Reimbursable Scheduled, In Progress, and Ready To Bill Amount
U.S. Department of Labor ETA	Customer Invoice: CUST_INV-	01/11/2016				(7,531,331.49)

Step 8 Click on the *Plan* tab to view the budget (**Note:** These Rows are based on Object Class (sponsor categories))



Step 9 Budget Information appears (**Note:** The budget periods represent the years. For Example: Year 1, Year 2, Year 3, etc.)

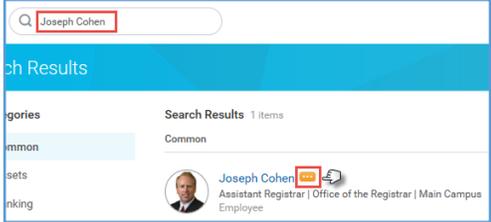
*Object Account/Summary	*Fund	*Grant	Job Profile	Object Class	Budget Period	Budget Period	Budget Period	Budget Period
					Amount	Amount	Amount	Amount
Broward College Master - Direct Expenses	Fund Hierarchy: Sponsor Funded	Grant		Object Class: Standard: Personnel				
Broward College Master - Direct Expenses	Fund Hierarchy: Sponsor Funded	Grant		Object Class: Standard: Fringe				
Broward College Master - Direct Expenses	Fund Hierarchy: Sponsor Funded	Grant		Object Class: Standard: Travel				
Broward College Master - Direct Expenses	Fund Hierarchy: Sponsor Funded	Grant		Object Class: Standard: Supplies				
Broward College Master - Direct Expenses	Fund Hierarchy: Sponsor Funded	Grant		Object Class: Standard: Equipment				
Broward College Master - Direct Expenses	Fund Hierarchy: Sponsor Funded	Grant		Object Class: Standard: Contractual				
Broward College Master - Direct Expenses	Fund Hierarchy: Sponsor Funded	Grant		Object Class: Standard: Other Expenses				
Broward College Master - Indirect Expenses	Fund Hierarchy: Sponsor Funded	Grant						
Subtotals								
Budget Period	3,004,221.64	Year 1						
Budget Period	4,672,012.08	Year 2						
Budget Period	4,276,231.08	Year 3						
Budget Period	992,538.41	Year 4						

Step 10 If you scroll down, you can see the subtotals for each year (If the grant is for more then a year)

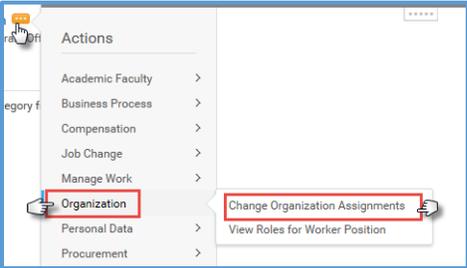
Subtotals	
Budget Period	3,004,221.64 Year 1
Budget Period	4,672,012.08 Year 2
Budget Period	4,276,231.08 Year 3
Budget Period	992,538.41 Year 4

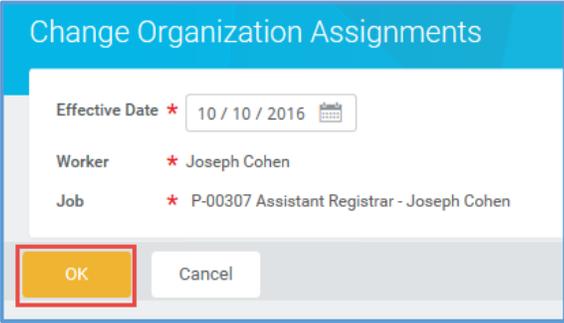
Change Organization Assignment (Worktags) for an Existing Grant Position

Step 1 Type worker's name in the search field and press enter



Step 2 Click on the related actions icon > Organization> Change Organization Assignments



Step 3	<p>Change Organization Assignments screen appears. Change the effective date if necessary and click Ok</p> 
Step 4	<p>Scroll down to <i>Organizations</i> section and click the pencil  icon and enter the following information:</p> <ul style="list-style-type: none"> - Cost Center - Business Unit - Program - Fund - Grant <p>Click the save  icon to save each section listed above</p>
Step 5	Enter Comments (not required)
Step 6	Click Submit

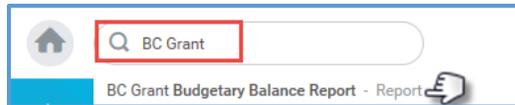
BC Grant Budgetary Balance Report

Grant managers can view this report at any time to review budget to actual expenditures for sponsored awards. If you are not able to access the report in Workday, please contact [Grants Accounting](#) manager to gain access.

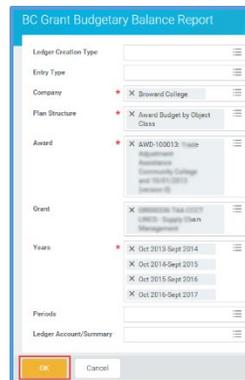
Note: Budgets are tied to an Award in Workday and grants are assigned to the Award with the money amount. Therefore, when comparing budget to actual, ensure to check at award level.

Step 1 Login to Workday

Step 2 Type BC Grant in the search field and select BC Grant Budgetary Balance Report



Step 3 The *BC Grant Budgetary Balance Report* screen appears, enter the required information and click **Ok**



Note: Selecting a Grant ID in the *Grant* field will display the individual grant. Additionally, in the year field you may select more than one year (if applicable)

Step 4 Next screen will appear with the budget balances (**Note:** To drill into the report, click on the blue hyperlinks)

Budget	Displays the current budget
Commitment	Displays the amount set aside for spending process (Job Requisition)
Obligation	Displays the total amount posted to your ledger for spend transactions (Purchase Orders)
Actual	Displays the total payments made
Balance	Displays the remaining plan after subtracting commitments, obligations, and actuals