SEAS Post Award
Research Administration Support

Jingyi Fan
seas-postaward@virginia.edu
SEAS Post Award Website
**What We Do**

SEAS Post-award works closely with faculty, department admins & UVA’s central research administration office - the Office of Sponsored Programs (OSP) to **deliver sponsored funds management services**.

<table>
<thead>
<tr>
<th>Award Management</th>
<th>Financial Oversight</th>
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<tbody>
<tr>
<td>• Award modification (NCE’s, Budget Mods, PI changes, etc.)</td>
<td>• Reconciliation and documentation</td>
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<tr>
<td>• Sub-award set up &amp; oversight</td>
<td>• Purchasing/Expense Reimbursement approval</td>
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<tr>
<td>• Cost sharing / Reporting requirements</td>
<td>• Account management and projections / Effort Reporting</td>
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<tr>
<td>• Solutions for outliers and problematic situations</td>
<td>• Tuition/Health Insurance Transfer</td>
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<tr>
<th>Risk Mitigation</th>
<th>Communication</th>
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<tr>
<td>• Manage compliance with federal/state regulations and sponsor requirements</td>
<td>• Communication with PI, central OSP, sponsors to complete</td>
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<td>• Audit assistance</td>
<td>award actions as needed, resolve problematic issues,</td>
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<td></td>
<td>assist with reporting, invoicing, award close-outs and</td>
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<td>residual transfers</td>
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*Note: In this PPT, Sponsored Funds and Grants & Contracts (G&C) are interchangeable terms. Department Admins manage non-sponsored funds, such as your start up package.*
Meet the Team

Jingyi Fan
Director of SEAS Post-award

Clara Fortune
G&C Administrator
Portfolio Manager for
- Computer Science (31330)

Shanika Burrus
G&C Administrator
Portfolio Manager for
- Chemical Eng. (31320)
- Material Science (31340)

Mohammed Eitta
G&C Administrator
Portfolio Manager for
- Eng. Systems and Environ. (31350)
- Engineering and Society (31360)

Sherry Fitzgerald
G&C Specialist
- Office Manager
- Requisition Review
- Subaward invoicing
- Effort/Final Reporting

Stephanie Baca
G&C Administrator
Portfolio Manager for
- Electrical and Computer Engineering (31335)

Lisa Taylor
G&C Administrator
Portfolio Manager for
- Biomedical Eng. (31315)
- Dean’s Office (31250)

Mikayla Sweet
G&C Administrator
Portfolio Manager for
- Mechanical Eng. (31345)
- Center for Applied Biomechanics (31365)

Note: G&C stands for Grants & Contracts
<table>
<thead>
<tr>
<th>Roles &amp; Responsibilities</th>
<th>PI</th>
<th>Department Admins (DA)</th>
<th>SEAS Post-award (PA)</th>
<th>OSP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Award Set Up &amp; Modification</strong> (no-cost extension, subaward set up, PI/SOW/budget change etc.)</td>
<td>PI notify SEAS Post-award on any actions needed</td>
<td>Prepare needed documentation and send to OSP/Sponsor</td>
<td>OSP set up/modify PTAO accordingly</td>
<td></td>
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<tr>
<td>Labor (LD) Scheduling/Adjustment (for GRAs, post-doc, faculty salary etc.)</td>
<td>PI provide the personnel info &amp; PTAOs to DA; Notify both DA and PA if adjustment is needed</td>
<td>Schedule LD/make LD adjustment in Oracle. Enter GRA pay/tuition/health ins in SAFM.</td>
<td>Monitor spending to avoid deficit/underspent. Alert PI &amp; DA if LD adjustment is needed. Process tuition/health ins for GRAs.</td>
<td></td>
</tr>
<tr>
<td>Purchasing/Reimbursement (Purchase Orders (PO), payment vouchers or seeking reimbursement via ExpenseUVA)</td>
<td>PI provide DA with info and PTAOs or enter your own reimbursement requests via ExpenseUVA (within 30 days of purchase).</td>
<td>DA enter requests on behalf of PI in the appropriate systems (within 30 days of purchase for reimbursement).</td>
<td>Review and Approve the purchasing/reimbursement requests</td>
<td></td>
</tr>
<tr>
<td>Cost Share</td>
<td>Provide DA with info of labor/non-labor expenses to be charged as cost share</td>
<td>DA schedule/charge cost share items on CS PTAO</td>
<td>Notify PI &amp; DA when CS PTAO is set up.</td>
<td>Prepare and submit official CS reporting</td>
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<tr>
<td>Monthly Recon</td>
<td>Review and Approve Recon via Recon@UVA</td>
<td>Prepare Monthly Recon Report in Recon@UVA by 5th of each month</td>
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<tr>
<td>Reporting/Invoicing</td>
<td>PI is responsible for all technical reports/quarterly progress reports/final report</td>
<td>Prepare info on spending plan (projections); Work with PI on the submission of final report &amp; Patent Report</td>
<td>Prepare and submit official financial reports &amp; Invoicing</td>
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Most Important take-aways for you today

• Email seas-postaward@virginia.edu whenever you have questions/inquiries/services needed related to sponsored funds.
  • The appropriate portfolio manager would pick up the tasks from this email and you should expect a response **within 48h** during working days.
  • If you don’t receive a response within that timeframe, please feel free to contact the director Jingyi Fan at jf5nf@virginia.edu.

• Know your **grant PTAO numbers**
What is PTAO & How to look up

PTAO = Project # + Task# + Award# + Org#
• Similar to your bank account #, PTAO refers to the financial account numbers used in UVA system

For Grants & Contracts (sponsored PTAO):
– Award number starting with “G” & “CS”-cost share companion account associated with a grant
– Task Number is always: 101
– Org #: your department affiliation
• For example:
  – 999999 – 101 – GA99999 – 31320 (this is a sponsored PTAO)
  – 106698 – GRA - SS00407 – 31345 (this is a non-sponsored PTAO)

You would need to provide your PTAO number(s) to incur any charges.

• Preferably, reference the PTAO number(s) you are inquiring about when contacting SEAS Post-award
• To Look up your PTAO number, use ResearchUVA or RAD (Research Admin Dashboard), or email us at seas-postaward@virginia.edu to get your list of PTAOs.
  (Instruction on how to look up PTAOs in ResearchUVA & RAD is at the end of this ppt)
ResearchUVA  
https://researchuva.virginia.edu/

- ResearchUVA is a portal for monitoring financial activity on sponsored programs. It's an archive for agreements and documents supporting research.
  - Proposal submission & tracking
  - Account status/notification
  - Account balance/burn rate
  - Compliance management

- Note: balance on ResearchUVA doesn’t show commitment (especially commitment for external subawards). RAD (Research Admin Dashboard) would present a better projection of project balance but sometimes the commitment data is not pulling properly. Please email seas-postaward@virginia.edu for comprehensive balance projection.
Reviewing charges placed on your accounts each month is a simple way to proactively reduce risk and successfully manage your research awards. It's also required.

- If any charges are incorrect, make a note via “Issue” action and send it back. SEAS Post-Award account manager will contact you to resolve the issue.
How PI & Post-award Work Together

- Communication!!!
  - SEAS Post-award would proactively reach out to PI & Department Admins on any anticipating issues.
  - Please reach out to SEAS Post-award if you have any updates/adjustments related to grants and contracts.

Seas-postaward@virginia.edu
Looking Up PTAOs in RUVA & RAD
On your ResearchUVA dashboard

You can keep track of proposal/non-funded agreement status, as well as some fast facts for award/project ending, project in deficit or burn rate.
You need to change to “View Active Projects Instead” if you see “Active Awards” on your dashboard.

Scroll down to “Active Projects” & click on the project #
Piece together your PTAO #:
160xxx – 101 – GO12xxx – 31335
RAD

Access RAD via UVA Links on the left side bar of ResearchUVA
- Select “Project” in Timeline View.
- Hover your mouse on the bar chart and the award number, project number and projected balance with enhanced commitment would be displayed.

Please feel free to contact our office if you would like a more in-depth tour on navigating ResearchUVA & RAD.