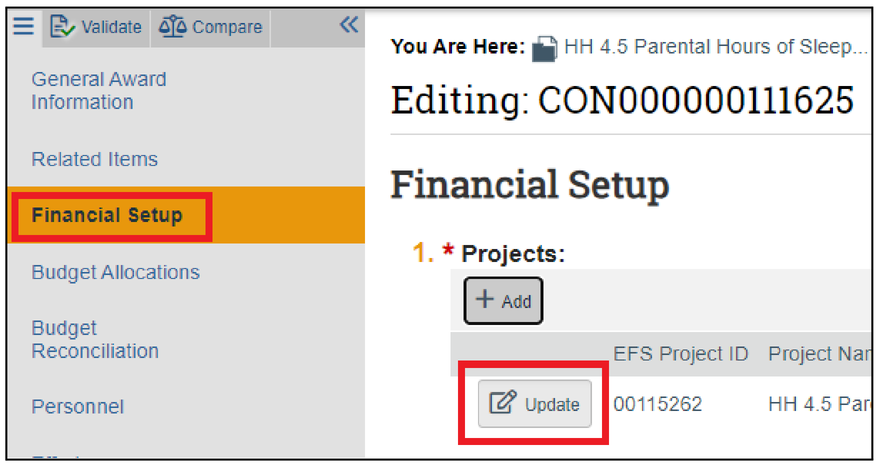
Award Setup SmartForm – Financial Setup Page (Departments)

The Department Administrator's role on the Financial Setup page on the Award Setup SmartForm is to verify the information entered by the SPA GCO and update information as needed.

This page allows a departmental user to specify the financial accounts (PeopleSoft EFS Projects) that will be used for the award setup. A default financial account (project) is automatically created, and additional financial accounts (projects) should be created if needed to manage the award.

Note: This page is equivalent to the Projects tab in EFS.

Follow the steps below to verify and update the financial account (project) details for each project:



1. Select the **Financial Setup** page on the Award Setup SmartForm.
2. Select the **Update** button to open the Edit Financial Account slide-in window and verify the fields as described below.
    a. **Project Name** – The project name should match the project title. This name is sent to PeopleSoft when the project is established and will display on various financial reports (including the Other Support report).
    b. **Description** – optional field that may be used.
    c. **Start Date** – start date for the entire length of the specific project.
    d. **End Date** – end date for the entire length allowed for this specific project.

Note: The project's start and end dates must fall within the dates of the award range. MN-GEMS does not validate this so extra care is required.

    e. **PI** – pre-populates to the award PI but can be changed if the project has a different PI.
    f. **Administering Department** – this pre-populates to the award owning department

but can be changed if a different department is responsible for the project. Department should confirm that this is correct.

   g. **Indirect cost rate type** – this pre-populates from the funding proposal
   h. **Indirect cost base type** – this pre-populates from the funding proposal and should not be changed. In rare cases, a project will require a different indirect cost base (e.g, segregation of costs that an agency mandates removed from F&A) but in general, absent such exceptions, there can be only one indirect cost base per award
   i. **Active** – this field defaults to True to allow allocations to reference this financial account. Leave value as **True**.

Note: Inactive accounts are not available for selection in new allocations.

   j. **F&A rate type associated with this Project -** Verify the correct rate type is selected
   k. **Method the sponsor wants to be billed** – Verify the correct option is selected
   l. **Function code associated with this project –** Verify the correct option is selected
   m. **EFS Project ID -** this pre-populates from the funding proposal and cannot be changed

Note: Only the primary project will have an EFS project number automatically populated. Additional projects will be given a project number after MN-GEMS integrates with EFS.

   n. **Enter the chartsting associated with this project -**
      1. **Fund –** Verify the correct fund code is entered.
      2. **Dept ID –** Verify the responsible Dept ID is correct.
      3. **Empl ID -** If applicable
      4. **CF1 -** If applicable
      5. **CF2 -** If applicable
   o. **Enter the F&A distribution associated with this project –** Verify the F&A distribution is correct. If F&A is to be shared by %, then it can be split by % here.

3. When complete, select **OK** to return to the Financial Setup page.

Additional child projects can be added by sending a request to your SPA GCO via the Send Email activity in MN-GEMS.