

Sul Ross State University
Business Process Analysis – Finance Module

Process Name: Recording Grant Budgets

Date: September 13, 2005

Time: 3: 20 pm

Location: UC Executive Conference Room

Participants: John Young, Anita Wright, Tanya Romero, Patty Roach

Session Lead: John Young, Visio; Tanya Romero Narrative

Narrative/Description: SRSU receives signed grant from grantor or continuation award notification from grantor. If this is a new grant then a request to set-up new account is submitted to VPBA office for approval. VPBA office sends approval to Controller to set up new account and account(s) is established. If this is not a new grant then a new account is established if the grant requires it or if the PI/PD requests it. Controller will set up account for continuation grants. Approved budget is submitted to Grant Accountant for preparation of JE. Grant Accountant prepares JE for approval by Assistant Controller. Accounting Supervisor enters approved JE into FRS.

Electronic Inputs: None

Manual/Paper Inputs: Approved grant award notification; approved JE document; e-mail notification to set up new account or hard copy.

Key Decision Points (list all): Is it a new grant or a continuation. Is new account required.

Related Policy(s): None

Interface to Other Systems: FRS

Web Features: None

Electronic Outputs: None

Manual/Paper Outputs: JE document

Customer(s): Accounting, Budget Office, PI/PD, Purchasing

Regulatory Items: Grantor Policies

Frequency/Volume: 30 annually

Potential Break Points: Grant notification is not sent to a central point; PI/PD is not aware of process for submission of notification. Budget not established in a timely manner.

Automation: None

Issues: PI/PD does not use correct account on multi-year grants. PI/PD might have mis-classified expenditure items in the budget. Budget recorded as revenue verses budget. When budgets are recorded to budget pools, ABR rules need to be reviewed and possibly reset to properly reallocate budget.