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myGRANT Research Training and Revolving Funds (RTRF) Allocation Reports—Web Reports

At fiscal year-end, ORS prepares a report of the allocated indirect costs for the fiscal year, which is the basis for the Research Training and Revolving Funds (RTRF) allocation to the various units. The allocation of the indirect cost to the unit, department and key personnel is based on the RTRF credit split information as recorded in myGRANT. The report is prepared on a fiscal year basis, therefore, RTRF credit split information recorded in the myGRANT award record as of June 30, 2017, should reflect the allocation to be applied for 2017 indirect cost generated for that award.

Information on the myGRANT RTRF percentage credit split is available on the ORS website under Reports/Up-To Date Reports/RTRF Allocation Reports (http://www.ors.hawaii.edu/index.php/reports/up-to-date-reports). The reports will provide the percentage credit split reflected in the myGRANT record by person and by award.

Under the “Reports by Individual,” key personnel are able to enter their name in the search function, and a list of their myGRANT awards and the related Kuali Financial System (KFS) award ID will be shown. The sample format for the report is as follows:

<table>
<thead>
<tr>
<th>KFS Award Number/Last Child Record for KFS Award ID</th>
<th>KFS Award ID</th>
<th>Title</th>
<th>Key Personnel</th>
<th>Lead Unit</th>
<th>Campus</th>
<th>College</th>
<th>Department</th>
<th>Award Sponsor</th>
<th>RTRF Allocation %</th>
<th>Award Start Date</th>
<th>Award End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>009999-00005</td>
<td>42135</td>
<td>Research Project A</td>
<td>Doe, John</td>
<td>Y</td>
<td>UH MA</td>
<td>College1</td>
<td>Dept 1</td>
<td>Sponsor 1</td>
<td>50</td>
<td>1-Mar-14</td>
<td>31-Aug-17</td>
</tr>
<tr>
<td>001000-00010</td>
<td>35979</td>
<td>Research Project B</td>
<td>Doe, John</td>
<td>N</td>
<td>UH MA</td>
<td>College1</td>
<td>Dept 1</td>
<td>Sponsor 1</td>
<td>25</td>
<td>1-Dec-15</td>
<td>31-Jul-16</td>
</tr>
</tbody>
</table>

(Continued on next page)
Please note the following:

- The awards included will be those that have a termination date after March 31, 2016.
- If there are multiple records for the same myGRANT award/KFS award ID, the split allocation will be based on the split recorded in the most recent award record.
- The names entered in the InfoEd and myGRANT systems may have been entered with or without a middle initial. Therefore, two names may be shown for the same person, so to get a complete list, both name formats (with and without initial) should be included when searching.

Once the search is completed by individual, the myGRANT Award Number will be reflected in the report. Enter the most recent (highest suffix, e.g., 00005) myGRANT record number in the “Report by Award” to see the total split by award for all key personnel involved.

<table>
<thead>
<tr>
<th>KFS Award Number/Last Child Record for KFS Award ID</th>
<th>KFS Award ID</th>
<th>Title</th>
<th>Key Personnel</th>
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</tr>
</thead>
<tbody>
<tr>
<td>009999-00005</td>
<td>42135</td>
<td>Research Project A</td>
<td>Doe, John</td>
<td>Y</td>
<td>UH MA</td>
<td>College1</td>
<td>Dept 1</td>
<td>Sponsor 1</td>
<td>50</td>
<td>1-Mar-14</td>
<td>31-Aug-17</td>
</tr>
<tr>
<td>009999-00006</td>
<td>42135</td>
<td>Research Project A</td>
<td>Smith, Ann</td>
<td>N</td>
<td>UH MA</td>
<td>College2</td>
<td>Dept 3</td>
<td>Sponsor 1</td>
<td>50</td>
<td>1-Mar-14</td>
<td>31-Aug-17</td>
</tr>
</tbody>
</table>

Key personnel should review the above reports for:
- Any missing project, and
- The myGRANT Percentage Credit Split.

If changes are required for the RTRF credit split:
- Create and submit a Proposal Development record (PD) for approval routing
- Select Proposal Type: Post Award-Change in RTRF Allocation
- If copying a prior PD, delete any inapplicable documents and attach all relevant documentation

Please ensure that all parties are in agreement and the fully routed PD is submitted in myGRANT to ORS by **June 15, 2017**. This will allow the assigned ORS Specialist to update the myGRANT award record by June 30, 2017.

If you have any questions, please contact Joanne Yama, Associate Director of Cost Studies, at jyama@hawaii.edu or (808) 956-9242.
The due dates for submission of fiscal year-end Kuali Financial System (KFS) eDocs are aligned with the Year-End Closing Schedule. In line with these due dates, ORS is providing the following additional information and reminders on ORS-specific KFS eDocs for fiscal year-end.

<table>
<thead>
<tr>
<th>Year-End (YE) Closing Calendar Reference</th>
<th>ORS Specific Reminders</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISBURSING &amp; PAYROLL – Payment documents-Non General Funds (PREQs):</td>
<td>KFS will not allow PREQ eDoc approval past termination date of account; PREQs for accounts terminating 6/30/2016 must be submitted by 6/05/2017. FAs must approve PREQ eDoc to final by 6/16/2017.</td>
<td>6/05/2017</td>
</tr>
<tr>
<td>Submitted to Disbursing</td>
<td></td>
<td>6/16/2017</td>
</tr>
<tr>
<td>FAs to approve in KFS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reclass RCUH Advances (7232) thru June</td>
<td>Extramural project accounts that are closing should have all balances in 7232 re-classed to proper expenditure object codes.</td>
<td>6/23/2017</td>
</tr>
<tr>
<td>Non General Fund PAYMENTS – DV eDocs)</td>
<td>Includes DV for Vacation Credit Transfer to State Agency (2071)</td>
<td>6/16/2017</td>
</tr>
<tr>
<td>Budget adjustment eDocs for ORS accounts should be “IN ACTION LIST APPROVE” for ORS</td>
<td>Extramural account budget SSBA and BA eDocs</td>
<td>6/26/2017</td>
</tr>
</tbody>
</table>

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### 2017 Fiscal Year-End Deadlines for Submission of Kuali Financial System (KFS) eDocs (continued)

<table>
<thead>
<tr>
<th>Year-End (YE) Closing Calendar Reference</th>
<th>ORS Specific Reminders</th>
<th>Due Date</th>
</tr>
</thead>
</table>
| **eDocs for BOTH General funds AND non General funds should be approved, in PROCESSED or FINAL status – DI, GEC, IB, SB, ST, TF** | Includes the following:  
  • Clearing Account (Continuation Account) adjustments  
  • Project account deficit adjustments  
  DI for Cost sharing entries for FY 2017 (Note: include estimates, if necessary, for UH salaries and fringe for 6/15/2017 and 6/30/2017 periods) – See April ORS newsletter article - "Reminders for Cost Share Entries in the Kuali Financial System" for further information | 6/23/2017 |
| Account maintenance eDocs (new accounts, account edits) should be "IN ACTION LIST APPROVE" for GALC/ORS | All new account requests and account edits for project accounts | 6/26/2017 |
| **ACCRUALS & OTHER 13TH MONTH Adjustments** | YE JV worksheets: RCUH related (due to/from 7232 reclass)  
YE JV worksheets: Other accruals/adjustments (non-A/P) | 07/12/2017  
07/14/2017 |

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KFS eDocs submitted after the due dates noted above may not be processed for fiscal year 2017. Any fiscal year (FY) 2017 eDocs in ‘enroute’ status on July 1, 2017 will be auto-disapproved and will need to be resubmitted in FY 2018.

ORS appreciates your assistance with ensuring a successful year-end close. In order to avoid the last minute rush at fiscal year-end, please plan to submit KFS eDocs as soon as possible and no later than the established due dates. Below are the ORS contacts should you have questions:

**Account, Budget, and Cost Sharing eDocs**

Robert Roberts, Projects Fiscal Accounting Manager, at rroberts@hawaii.edu or (808) 956-6959.

**Clearing Account, Deficit Adjustments**

Dawn Kim, Compliance Manager, at dawnkim@hawaii.edu or (808) 956-0396.

On May 24, 2017 at 12:00 pm ORS will be performing an upgrade to the ORS reporting system, Cognos. We anticipate this planned outage will take between 1 to 2 hours to perform.

This upgrade should not affect the majority of our users but if you are a user using bookmark links to any of the ORS web reports or Award/Subaward Status log you will need to update it to the new address once the upgrade has been completed. The ORS website will have the new links to all reports when the upgrade has been completed.

If you experience any system issues with this upgrade please contact the ORS Helpline at helpline@ors.hawaii.edu or (808) 956-5198.
A proposal I am trying to work on in myGRANT has a note “This proposal is locked for editing by (username)”. What does this mean?

Whenever a user opens a proposal in myGRANT, the system automatically locks the proposal so no one else can make changes to it while they have it open. To unlock a proposal, you need to use the “close” button at the bottom of any page of the proposal. If you just close the browser window or logout without using the “close” button, it will not unlock the proposal for others to edit.

If you need to work on a proposal and someone else has it locked, please contact that person to make sure they are no longer working on the proposal, or contact the ORS Helpline for assistance.

I am trying to make changes to a budget that was returned for changes in myGRANT, but all the fields in the budget are not editable. How can I make changes to the budget?

Make sure the budget is not marked as “Complete”. Once the budget is marked as “Complete,” the budget is locked from editing. To change the budget status, go to the “Budget” tab, and use the “Action” dropdown menu on the right side of the budget version and select “Mark Budget Incomplete”.

I submitted a proposal in myGRANT. How can I check the workflow status?

Open your proposal in myGRANT and go to the “Summary/Submit” tab. You can check the status of your proposal by using the “View Route Log” button. There should be three sections, “Actions Taken,” “Pending Action Requests,” and “Future Action Requests.”

**Actions Taken:** All actions that have been completed for the proposal. This section will usually list the initiator as saving and completing the proposal, and any subsequent approvals.

**Pending Action Requests:** This section will list the approvals that are currently awaiting completion. The current pending action requests must be completed before the proposal can move forward in the approval process. If you see “Central ORS” as the pending approval, the proposal has reached ORS for review.

**Future Action Requests:** This section will list the approvals that will need to be completed once the current pending actions are completed. The approvals in this section are listed in the order that they need to be completed.