REQUESTS FOR A SEPARATE PROJECT TO BE SET UP (SPLIT FROM A PRIMARY PROJECT)

Presented at the AURA Meeting on June 16, 2004
Justifiable reasons for requesting a separate project be set up:

- The work on the grant is shared between/among Schools or Operating Units.
- The work on the grant is shared between/among Departments.
- The work on the grant occurs both on and off campus, and thus has two IDC rates.
Non-justifiable reasons for a separate project being set up:

- The work on the grant is shared between/among Divisions of the same Department.
- The work on the grant is shared between/among PIs in the same Division or Department.
Reasons why you might not want to request a separate project even if you have a justifiable reason:

- Each project will have a unique ChartField String and SpeedType in FMS, and a unique Account Code in HRMS.
  - Purchasing transactions for supplies that are shared require more data entry.
  - PAs for employees that are shared require separate funding lines.
- There will be a separate ledger sheet printed for each project, thus it can be more difficult for the PI and the PI’s Departmental Administrative Staff to determine if the funding is being spent in a timely fashion.
- The primary School, Operating Unit, Department will be “giving away” IDC recovery funds that pay for administrative support.
Before you make the request:

- Make sure that everyone in your School/Department’s working group is in agreement. For example, since separate projects may mean more work for the PA submitters, please check to make sure they agree with the request.
Example of why everyone needs to be in agreement:

- PAF received set up documentation that listed separate budgets and PI/Org Managers for separate parts of the project, so we set up separate projects and notified the PI/Departmental staff of the set ups.
- PAF then received notification from the PA submitter (with approval from the Dean/DMO) that all work should be combined onto a single project number, and separate project numbers were not wanted.
Example of why everyone needs to be in agreement (cont.):

- PAF inactivated the separate project numbers that had been set up.
- Approximately 6 weeks later, PAF received notification from the Departmental staff (with approval from the Dean/DMO), that separate accounts were needed after all, although not as many as previously requested because the work had been re-combined.
How to make the request for a separate project to be set up

- Submit a request to the PAF Team. The request should include the following:
  - The total amount of Direct Costs, and related Indirect Costs, that will be in the separate projects.
  - A detailed budget for the budget pools that the Direct Costs will be budgeted to.
  - The PI/Org Manager for each of the projects.
  - The FMS Dept ID for each of the projects. (Please provide the specific numbers.)
  - The budget period for the separate projects.
  - Sufficient identifying information that PAF can identify the grant (such as the existing FMS Project number, the Grant Award number, the Agency and PI name, the Project title, etc.)
  - Approval signatures by the appropriate PIs and Dean(s).
RESOURCES

- Within the next few days, PAF will be posting instructions on our website.

- The instructions that are posted will include a request template.
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