Overview of Contract and Grant Accounting (CGA) and FM Networking

November 2021 RAN Meeting
Agenda

- CGA Office Overview
  - Purpose and Post Award Services Provided
  - Website Resources
  - Staff Introductions

- Fiscal Monitor Networking and Q&A (Breakout Rooms)
CGA's Mission

Customer Support
- PI's
- Department Administrators

Compliance
- UNM Policy
- Federal Regs (UG)
- State Law
- Agency T&C's
Award Review and Acceptance

- Issue index and monitor pre-award/advance (RTSF) account
Award Setup

- Complete award setup in Banner’s research accounting screens
- Establish index number in Banner
## Post-Award Financial Tasks

- Review and approve financial transactions such as journal vouchers, travel reimbursements, requisitions for purchases, labor redistributions, etc.
- Approve re-budgeting requests that do not need sponsor approval
- Ensure that cost sharing is documented
- Use financial reports to monitor and oversee expenditures
- Monitor program income and cost share funds
- Prepare and submit invoices and financial reports to sponsors
- Manage effort certification process to ensure compliance
Subaward Administration

• Set up encumbrance in Banner for funds obligated (committed) to subrecipient
• Review, approve, and route subaward invoices for payment through A/P
CGA | Services Provided

Project End & Closeout

- Inactivate award account(s) in financial accounting system
- Prepare and submit all final non-technical reports to sponsor
- Maintain official financial and project documentation for sponsored projects in accordance with retention requirements
CGA | Other Services Provided

- Audit Support and POC
  Monitoring compliance with federal, state, and UNM polices, as well as Sponsors' terms and conditions
- Cash Management and Collections for Sponsored Projects A/R
  Consulting with departments on any topic related to fiscal compliance
https://cgacct.unm.edu/

The Pack is Back  Effective Monday, August 2nd, and in conjunction with UNM’s Safe Return to Campus, Contract and Grant Accounting, Suite 2100 in the John & June Perovich Business Center, will be open. Throughout the pandemic, we have taken great pride in our continuous support of the research enterprise at UNM, with no major interruptions to our business operations. Although most C&G employees will be telecommuting on select days, our doors will be open Monday thru Friday from 8am to 5pm (closed between noon and 1pm for lunch) with adequate coverage provided for each team. We look forward to providing continued support and service to our research community, now in-person and online.

UNM Coronavirus (COVID-19) Information

Welcome

Contract and Grant Accounting provides the University of New Mexico’s research community with professional expertise and quality customer service in the management of external funding. We strive to provide guidance and support to ensure
# OVPR Service Matrix

## Navigating UNM Research

The **Research Roadmap** lists the major steps in developing and submitting proposals and managing awards. In all cases, the Principal Investigator (PI) has primary responsibility for ensuring compliance with university, state, and agency policies and requirements throughout the life cycle of each project—from proposal to closeout. The table below provides links for specific services and resources to assist PI’s in fulfilling this responsibility. All offices have contact information if a specific need or question is not addressed in the linked web pages below. For general inquiries, email ovpr@unm.edu.

<table>
<thead>
<tr>
<th>Funding Opportunities</th>
<th>Service Provided</th>
<th>Service Office</th>
<th>Website Link</th>
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<tbody>
<tr>
<td>Proposal Development</td>
<td>Help with funding searches and solicitation analyses</td>
<td>Faculty Research Development Office</td>
<td><a href="https://frdo.unm.edu/?q=funding_opportunities">https://frdo.unm.edu/?q=funding_opportunities</a></td>
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<td>Safety and Compliance</td>
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<td>Proposal Review, Approval, and Submission</td>
<td>Administer Limited Competitions</td>
<td>Faculty Research Development Office</td>
<td><a href="https://frdo.unm.edu/?q=limited_competition">https://frdo.unm.edu/?q=limited_competition</a></td>
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<td>Post-Award Financial Tasks</td>
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<tr>
<td>Post-Award Non-Financial Tasks</td>
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<td>Subaward Administration</td>
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<td>Project End &amp; Closeout</td>
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CGA | Who We Are

CGA Management Team

- Rosa Gonzalez-Rosenblatt, Director
- Jeremy Hamlin, Associate Controller
- Jessica Armijo, Accounting Manager
- Teresa Hammitt, Accounting Manager
CGA | Who We Are

CGA Administrative Team

- Stephanie Sanchez, HR Tech
- Tamaira Andrade, Sr. Fiscal Services Tech
CGA | Who We Are

CGA Cash Team

- Denise Vigil, Sr. Financial Services Acct
- Tamara Archuleta, Sr. Fiscal Services Tech
- Rosalie Mireles, Sr. Fiscal Services Tech
- Mikayla Lujan, Fiscal Services Tech
CGA | Who We Are

CGA Fiscal Monitors
- Alana Watts
- Anthony Gallegos
- Denise Vigil
- Kwaku Sraha
- Danielle Gurule
- Ernesto Trujillo
- James Seegers (Financial Aid)
- Julie Roberts
- Moe Bundrage
- Danielle Burwinkle
- James Medina
- Ryan Perry
- Mark Herrell (FM Support)
How To Contact Us

Email: indexcga@unm.edu

Phone: 277-4721

Twitter: @UNMCGA

MS Teams: https://cgacct.unm.edu/contact-us/index.html
Networking and Breakout Rooms

Topics of discussion for breakout rooms

- Introductions and a brief description from units of where they are from and what type of research is done in their unit
- Questions submitted via RSVP
- Other Q&A (time permitting)
Resources

- CGA Website: https://cgacct.unm.edu/
- OVPR Service Matrix: https://research.unm.edu/servicematrix
THANK YOU FOR ATTENDING!