Overview of
Contract and Grant Accounting (CGA) and FM Networking
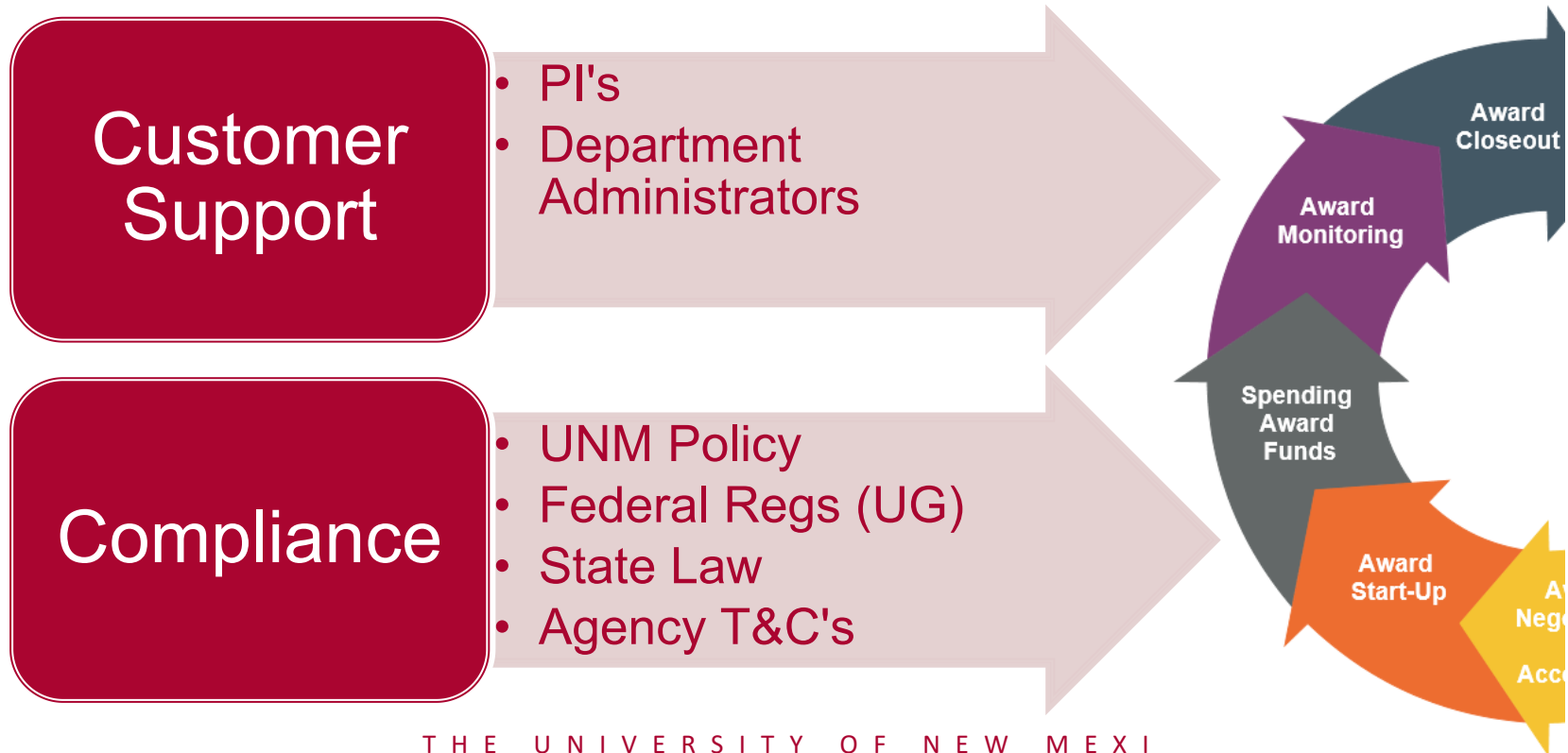
November 2021 RAN Meeting

THE UNIVERSITY OF NEW MEXICO

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 Closeout

Award Monitoring

Spending Award Funds

Award Start-Up

CGA | Services Provided

Award Review and Acceptance

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

CGA | Services Provided

Award Setup

- Complete award setup in Banner's research accounting screens
- Establish index number in Banner

CGA | Services Provided

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

CGA | Services Provided

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
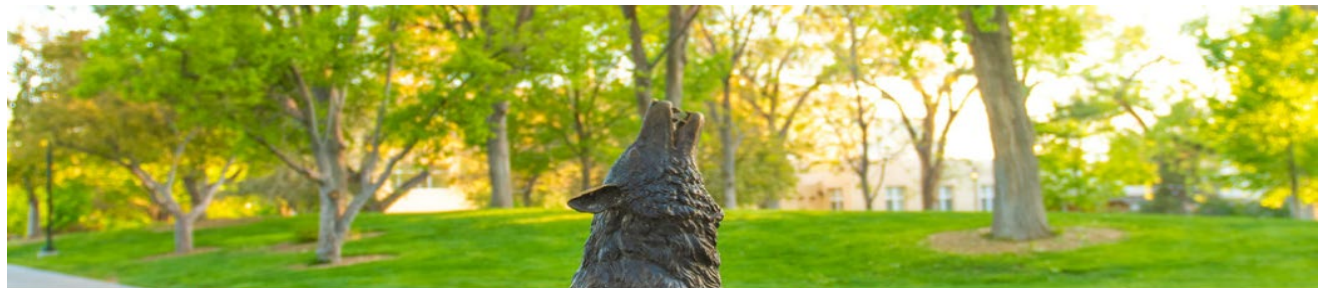
Audit Support and POC

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

CGA Website Resources

https://cgacct.unm.edu/

Home   Effort Certification   Forms   Contact Us▾   Travel   Awards▾   Resources▾   Other FSD Departments▾

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

Award Tools

- BARs
- Banner 9
- Cayuse
- Chart of Accounts
- Chrome River
- COA Requests
- EPAF's
- Labor Approvals

Welcome

CONTRACT & GRANT ACCOUNTING

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

Current Effort Certification Period

1/1/21 - 6/30/21

More Information

UNM Single Audit Reports

Click here to view UNM's Annual Audited Financial Statements

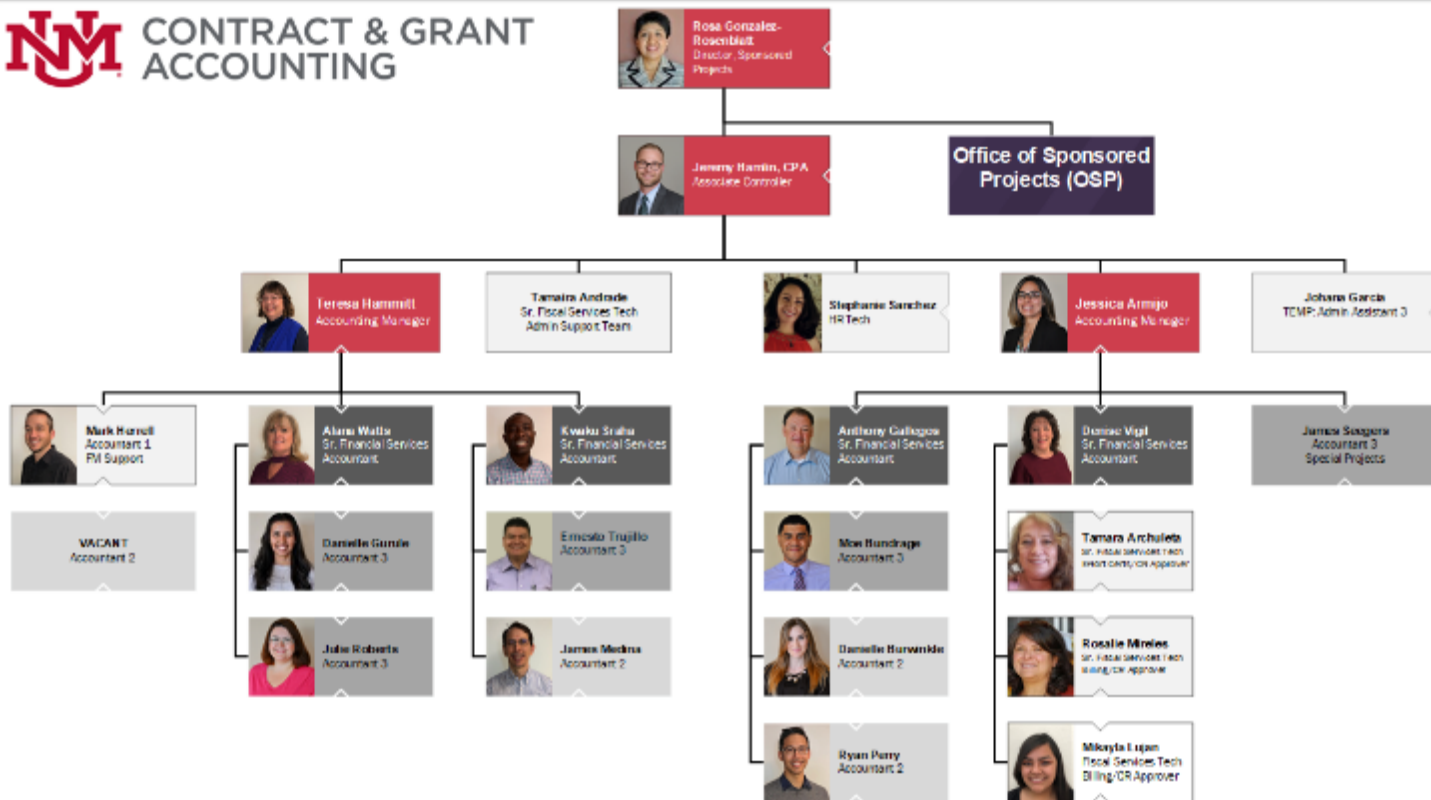# OVPR Service Matrix

https://research.unm.edu/servicematrix

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.

Funding Opportunities
Proposal Development
Safety and Compliance
Proposal Review, Approval, and Submission
Award Review and Acceptance
Award Setup
Post-Award Financial Tasks
Post-Award Non-Financial Tasks
Subaward Administration
Project End & Closeout

Funding Opportunities		
Service Provided	Service Office	Website Link
Help with funding searches and solicitation analyses	Faculty Research Development Office	https://frdo.unm.edu/?q=funding_opportunities
Administer Limited Competitions	Faculty Research Development Office	https://frdo.unm.edu/?q=limited_competition

CGA | Organization Chart

CONTRACT & GRANT ACCOUNTING

Rosa Gonzalez-Rosenblatt
Director, Sponsored Projects

Jeremy Hamlin, CPA
Associate Controller

Office of Sponsored Projects (OSP)

Teresa Hammitt
Accounting Manager

Tamaira Andrade
Sr. Fiscal Services Tech
Admin Support Team

Stephanie Sanchez
HR Tech

Jessica Armijo
Accounting Manager

Johana Garcia
TEMP; Admin Assistant 3

Mark Harrell
Accountant 1
PM Support

Alana Watts
Sr. Financial Services
Accountant

Kweku Sraha
Sr. Financial Services
Accountant

Anthony Gallegos
Sr. Financial Services
Accountant

Donnac Vigil
Sr. Financial Services
Accountant

James Seagora
Accountant 3
Special Projects

VACANT
Accountant 2

Danielle Gurule
Accountant 3

Ernesto Trujillo
Accountant 3

Moe Bundrage
Accountant 3

Tamara Archuleta
Sr. Fiscal Services Tech
Effort Cert/CR Approver

Julie Roberts
Accountant 3

James Medina
Accountant 2

Danielle Burwinkle
Accountant 2

Rosalie Mireles
Sr. Fiscal Services Tech
Billing/CR Approver

Ryan Perry
Accountant 2

Mikayla Lujan
Fiscal Services Tech
Billing/CR Approver

November 2021

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

UNM CONTRACT & GRANT ACCOUNTING

VACANT
Admin Assistant (OSP)

Stephanie Sanchez
HR Tech

Tamaira Andrade
Sr. Fiscal Services Tech

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
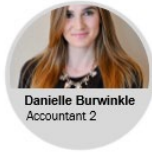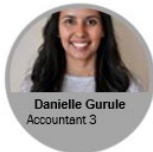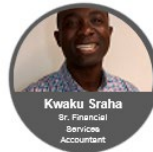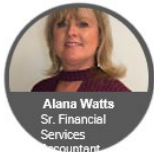- Mikayla Lujan, Fiscal Services Tech
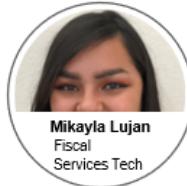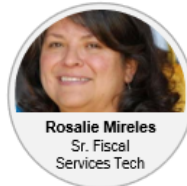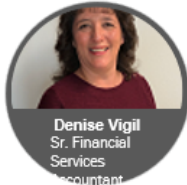
CGA | Who We Are

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)
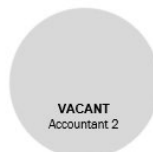
How To Contact Us

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

- MyReports Finance Reports by Business Cycle: https://myreportsinfo.unm.edu/finance/Reports%20by%20Business%20Cycle/index.html

THANK YOU FOR ATTENDING!

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