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Take an in-depth look at changes new grants management/payroll funding controls will bring [1]

September 14, 2018 by Employee Services [2]

On **Oct. 22**, new grants management/payroll funding controls will be enabled.

This change affects the following funds:

- 30 (Federal government sponsored)
- 31 (local government sponsored)
- 35 (CU Anschutz | CU Denver)
- Cost share funds (12, 22, and 32)

Additionally, the new controls include systematic policy changes to HCM (funding entry and PETs), CU Marketplace and Concur Travel and Expense.

In HCM, current controls do not enforce funding end date and project status validations, which allows payroll expenditures to process after an expired project end date. The lack of automated controls can present a compliance risk and require additional effort to monitor and correct transactions.

The new controls are sponsored by each campus Controller with full support from the Chief Financial Officers (CFOs) and Chief Information Officers (CIOs). The IT Governance Committee [3] oversees this initiative.

What do I need to do to prepare?

Please **proactively address** any position funding updates for which you are responsible as soon as possible before the Oct. 22 go-live.

Ensure your active funding entries meet the following criteria:

- The Funding End Date is populated
- The Funding End Date value is **prior, or equal to**, the Project End Date

If you have funding end dates that do not meet these criteria, create a CU Funding Entry to update funding.

Starting Oct. 22, you will not be able to create funding entries where the Funding End Date is blank or is after the Project End Date. The system will force a hard stop, rather than display the current warning message.

Review the Funding Entry step-by-step guide [4] to brush up on best practices and the Managing Funding Suspense step-by-step guide

[5] for information and strategies to avoid payroll in suspense. **Funding going to suspense is not a valid solution**.

Read the previous HCM blog article [6] about why new controls are needed.

What happens if I don't take action to address expired and blank funding entries?

On **Nov. 1**, active positions with a Funding End Dates left blank or set after the Project End Date will be systematically updated to reflect the Project End Date.

Important: Ensure you have valid speedtypes on your funding lines. Invalid speedtypes will send the payroll to suspense.

Relying on this systematic update is **not recommended**, as it may not represent how you would like payroll to be paid and may result in payroll going to suspense if past the Project End Date. **Remember: Funding going to suspense is not a valid solution.**

The update will create a new funding line with an effective date of 11/1/2018 and Funding End Date equal to the Project End Date. This may affect you if you already have an effective dated row of 11/1/2018.

Important: A large number of active positions in HCM have incumbents that have not been paid in years. These positions still need Funding End Dates. If the Project End Date is in the past, they will go to suspense. If an employee is no longer active, the employee should be terminated in HCM.

What if I'm waiting for a sponsored project to be extended?

The contract extension process varies by campus, and each campus is addressing ways to streamline and improve its contract extension process for timeliness. Please work with your Grants Administrator regarding your campus's extension process.

Visit your campus end date project website for additional information:

- CU Denver | Anschutz [7]
- CU Boulder [8]
- CU Colorado Springs [9]

I am an HCM user and I work in CU Marketplace and/or Concur for sponsored projects. What should I be aware of?

- Once a sponsored project reaches its end date, new purchase requisitions in CU MarketPlace cannot be created against it. The speedtype will not be available for use. Existing POs with the speedtype will allow invoices, but should be resolved within 60 days after the end date.
- Expense transactions in Concur can be entered after the Project End Date if they were incurred prior to the Project End Date. Concur will not allow any reports to be submitted with the speedtype after 60 days from the end date.

Additional information for the procurement audience will be provided via the PSC Newsletter this month.

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