Published on *University of Colorado* (https://www.cu.edu)

CU I&E Submission: Department Speedtype Check [1]

Category

Customer Service
Technology

Submitted By

Sarah Horwitz, sarah.horwitz@cuanschutz.edu [2], Research Services Manager (Grant Lifecycle Manager), Centers for American Indian and Alaska Native Health

Project Team

Sarah Horwitz, sarah.horwitz@cuanschutz.edu [2], Research Services Manager (Grant Lifecycle Manager)

Project Description

This is a Smartsheet used by finance team to check overall health of department speedtypes on a monthly basis. The spreadsheet has every speedtype, start date, end date, burn rate, action items, and notes. Each month, the sheet automatically clears the "Expenditures to Date" column and sends an email to the grant manager to remind them that it is time to check the projects. Then, the grant manager pulls Trial Balance reports through CU-Data to quickly compile the new Expenditures to Date. After inputted, the Burn rate is automatically calculated. Then, the grant manager looks through each report to check the status and record any issues that need follow up.

Project Efficiency

This has cut down substantially on overspending across our department and other administrative issues. It allows the department and the PIs to be proactive in their grant management and cuts down on issues that require clean up afterwards.

Project Inspiration

We had an instance where a grant was overdrawn and I needed to find a way to prevent that from happening in the future. Additionally, during project meetings PIs ask me about the burn rate, and I wanted a quick snapshot of the projects I manage so I could answer them without undue effort.

What Makes You Happiest about this Project?

I think it has helped my relationship with PIs because I have a better understanding of their projects and they appreciate me proactively solving potential problems before they arise.

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-department-speedtype-check

Links
[1] https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-department-speedtype-check [2] mailto:sarah.horwitz@cuanschutz.edu