Did you know you can view your faculty’s SeRA Dashboards? When faculty log into SeRA, they land on their My Projects page. Administrators also have access to faculty’s My Projects! With department level authority, administrators can select a principal investigator within their department and view the faculty member’s My Projects page.

The data will be automatically filtered based on the selected PI. My Projects will help you manage your PI’s projects by giving you access to project data. Explore the various options available to you:

- Clean-up the Other Support report by managing rejected proposals in the Submitted Proposals Pending Award section.
- Enter and save Major Goals/Specific Aims for active projects under Active Awarded Projects.
- Need a non-NIH formatted Other Support report? Just click on the Other Support Report - NIH.
- How much money is left on an award? Click on My Accounts to see sponsored and non-sponsored financial data instantly.
- Who has that transaction related to your PI’s project? Click on Activities in Progress by Others.

More features are coming to My Projects to make it more helpful for managing projects. Upcoming enhancement ideas include links to IRB/IACUC protocols; a calendar with proposal, report, and no-cost extension request due dates; ability to opt-into notifications and other managing preferences to help you stay on top of faculty portfolios.

We want your feedback! Let us know how My Projects can be more useful to you and your faculty. Send your ideas and comments to michiko@stanford.edu.
Subaward Invoice Management Best Practices

By Laura Register, Assistant Director, Subaward Oversight & Compliance

Good subaward management ensures timely receipt, upload and payment of invoices within Oracle Task and Award end dates. Doing so allows for accurate reporting to sponsors without having to re-open PTA’s, move funds, or journal expenses during final closeout.

Late invoice payment processing indicates poor management and oversight. Corrections require a significant amount of time, effort and coordination with the Department, OSR accounting, Subrecipient Monitoring and Accounts Payable (AP). All of which exposes the University to audit and compliance risks.

To improve subaward management, Oracle was enhanced to allow invoice payment 90-days beyond Task or Award end dates. SeRA was integrated with iProcurement for in-line subaward monitoring and processing, OSR subaward management seminars and updated Cardinal Curriculum subaward courses have been offered.

The next phase is to end the correction to subaward invoices which hit suspense PTAs due to posting of late invoices. Subaward invoices which hit department suspense PTAs due to late uploading, inadequate funds on the current PTA, or inaccurate line identification on invoices will not be moved back to the sponsored PTA except in exceptional circumstances.

Subaward agreement terms require subrecipients to invoice on a regular basis, specifically if the subaward restricts the carry-forward of funds, requires an annual soft close, and/or a Final Financial Report. Departments and PI’s must notify subrecipients who are not invoicing in accordance with the terms and advise them their invoices may not be paid.

Use the following subaward management best practices to avoid paying invoices from department suspense accounts:

- Note Oracle Task and Award end dates and reporting timeframes. AP must match invoices within the 90-days of a Task or Award end date to pay invoices. Invoices uploaded at the 90-day mark may not be paid from the Award.
- Upon receipt of invoices, review, obtain PI signature and certification, and upload invoices as soon as possible. Allow time to address issues preventing payment/posting.
- Communicate actively with all subrecipients to notify them when invoices are due and that late invoices will not be paid.
- Write the line that the invoice should be applied to on the invoice. This will help AP match the invoice to the appropriate line. If the line is not specified, the invoice may be automatically matched to the oldest line with funding with a closed Oracle task.
- If you have a carry-forward restricted award, make sure the line the invoice is being uploaded to has enough funding for the current period. If the line for the current period does not have sufficient funding, the invoice will be applied automatically to older lines with remaining funds that have closed Tasks.
- Once you’ve uploaded an invoice, check the Requisition and Purchase Order Inquiry screen to ensure the invoice has been applied to the correct line and not on hold.
- Do not rely on receiving an Oracle notification if the invoice is being held. The system sends notifications to the requisition requester of the line matched. If the requester has changed, the notification will not be updated.
- If an invoice is being held for payment due to a request for backup documentation from the subrecipient, or because performance is not adequate, notify your OSR accountant.

A SeRA enhancement to send reminder notifications to departments is in the queue. The notifications alert department of closures and prompt the uploading and payment of subaward invoices. Please email me with any questions at laregister@stanford.edu.
F&A! Have you Seen this Month’s ISC utility bill?!?
By Nguyet Sin, Associate Director Post-Award and Brian Del Bono, Senior Contract and Grant Officer, Pre-Award

How do we manage to keep the lights on? We all benefit from Stanford’s world class facilities. The cost to maintain Stanford’s infrastructure is shared between general University funds and restricted/designated funds.

**Infrastructure Charge (ISC)** assesses an 8% charge on restricted funds when funds are spent or transferred. For Sponsored Projects, ISC only applies if a non-government sponsor has a published policy of not paying for facilities and administrative (F&A), or indirect cost (IDC) costs. If the non-government sponsor has a published F&A rate greater than 0%, Stanford will apply the sponsor’s published rate. So if a sponsor has a 1% F&A rate, ISC will not apply.

If a non-government sponsor does not pay for F&A or IDC, ISC is still chargeable, and must be covered by a PI or department unrestricted, non-sponsored alternate PTA. The alternate PTA is entered in Oracle at account setup stage and appears on the FIN OSR 180 PTA Configuration Report.

Start early at the proposal stage by searching for the non-governmental sponsor on Stanford’s Pre-Approved IDC waiver list. If the sponsor is on the pre-approved list and has a rate greater than 0%, then ISC does not apply. However, if the sponsor is not on the pre-approved list, and does not have a publically available written policy stating it does not pay IDC or F&A costs, then ISC will apply. Exceptions to the ISC policy requires approval by the both the Provost and Chief Financial Officer.

ISC can be included in a proposed sponsored project budget, or the department/PI can pay for ISC with an alternate Stanford PTA. The Budget Questions page of the Stanford Proposal Development Routing Form (PDRF) contains validation to help ensure any applicable ISC is captured correctly. OSR Pre-Award and School of Medicine Research Process Management staff review proposals to make sure any applicable ISC is applied appropriately.

If a non-government sponsor allows ISC, 8% ISC will be charged on direct expenses posted to the sponsored PTA. ISC appears on the Oracle Business Intelligence (OBI) Expenditure Details report under expenditure type (ET) 58915 INTERDEPT ISC CHG ON EXP.

If ISC is covered by an alternate PTA, Oracle offsets the ISC debit with a credit by the same dollar amount. The debit to ET 58915 and credit to ET 58935 results in net $0 ISC charge to the sponsored PTA.

To see the amount of ISC charged to your alternate PTA, run the OBI Expenditure Details report where ISC is posted to ET 58935. Not all expenditures are subject to ISC. Excluded ETs are listed on the [Burden Expenditure Type Mapping](#) page.

Visit the [DoResearch Infrastructure Charges](#) webpage for more information or contact your OSR or RMG representative with any questions.