Grants Implementation Change Management Agenda

• Introductions
• Project Overview
• Changes to Business Processes
• Project Web Site
• Newsletter
• Questions/Discussion
Project Purpose

- Enhanced Compliance Processes
  - Accuracy and Timeliness of Reporting
  - Cash Management
  - Letter of Credit Management
  - Salary Cost Transfers
- Utilize Licensed PeopleSoft Modules
- Reduce Redundant Data Entry and Manual Processes
- Increase Operational Reporting Capability and Provide for Reporting of Performance Metrics
- Share Information with Key University Systems and Constituencies
- Better Manage Billing and Accounts Receivable
- Reduce Need for Supplemental Systems
Grants Process

1. PROFILE SET-UP & MAINTENANCE
2. PROPOSAL CREATION & TRACKING
3. AWARD SET-UP & NEGOTIATION
4. MONITOR & MANAGE AWARD
5. REQUEST REIMBURSEMENT
6. RECEIVE PAYMENT
7. CLOSE-OUT AWARD

REPORTING
Project Scope

• Implement the Grants Management Suite in Version 9.0 of PeopleSoft
  – Grants Management
  – Projects
  – Contracts
  – Billing
  – Accounts Receivable

• Adapt Existing PS Modules as needed
  – Commitment Control
  – General Ledger
Team Members

- Office of Research Administration
  - Mary Cotter-Lalli
  - Kasie Nichols
  - Lisa Asch

- Grants & Contracts
  - Tamie Franklin
  - Janetta Tesch
  - Laurie Price
  - Frank Schwartzott

- Financial Services
  - Scott Stuart
  - Sammy Mayfield

- Information Technology
  - Rao Velvadapu
  - Matt Malone
  - Gary Beckmann
Changes Resulting from Project

- Project Numbering
- Negotiations Bolt On
- Salary Detail
- Cost Share
- Milestone Notification
www.ouhsc.edu/grants

The University of Oklahoma

Grants Implementation Project

Grants Overview

OUHSC has committed to implementing the PeopleSoft Grants Suite to improve research administration business practices, reduce compliance risks, and to provide a strong technical foundation to meet current and future institutional needs. This project represents a significant opportunity for the institution to improve its operations and research administration business processes and maximize its current investment in the PeopleSoft Financials platform. The Grants project is a primary strategic initiative and has received a high level of support from institutional leaders and executive sponsors.

The Grants project will address current process and technology concerns for the university and provide a platform for future improvements in the areas of sponsored research reporting, enhanced compliance with federal and sponsor regulations and greater visibility into the key performance indicators of the research administration function. The Grants project is a necessary initial investment in a common systems platform that will serve to support future usage of delivered PeopleSoft functionality and integration with necessary research compliance and reporting systems.

Newsletter

GrantsNewsletter_July31_2009

Project Updates

Grants_Meeting_Slides_May5_2009

Time Line:

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The University of Oklahoma
Health Sciences Center
E-Mail Dorothy Polen to get on the distribution list.

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Questions?