Carnegie Mellon University
Sponsored Projects Accounting
(PA14) Monthly Meetings with Departments – Procedures
Updated: March 27, 2006

Frequency: Varies
Responsible Staff: Sponsored Projects Accountant
Approval Required: None

Summary:
Each SPA accountant should meet on a monthly basis with each of his/her Business Managers. These meetings are beneficial to both campus and SPA and are an effective way of communicating current award issues.

Procedure:
The following should be discussed in the monthly meetings between Business Managers and their SPA representative:

1. Any awards that currently have an Award Status of “At Risk” – so that the Business Manager can give a status as to any documentation they are waiting to receive from the sponsor. The SPA accountant should provide a list of these awards by filtering the most current AMS or BMS report.

2. Any awards that could not be billed in the previous month due to a task funding issue.

3. Any awards that currently do not have a budget in Oracle that ties to the funding amount – so that the Business Managers can either correct the budgets or provide SPA with the information needed to enter the budgets. The SPA accountant should provide a list of these awards by filtering the most current AMS or BMS report.

4. Any awards that are scheduled to be closed in the following month – so that the Business Manager can make any needed adjustments before the award is reconciled by SPA. The SPA accountant should provide a list of these awards by filtering the Closeout Tracker.

5. Any awards that have been reconciled, but not yet closed. Any issues causing the delay in the closing of the award should be discussed and rectified.

6. Any other issues regarding the awards that are in that department. Any open issues that are currently on the SPA Accountant’s status report should be discussed.