

BETHEL UNIVERSITY

WORKING WITH YOUR GRANT BUDGET

Responsibility

The Principle Investigator (PI)/Project Manager is responsible for overseeing and managing the grant budget.

Request a Grant Fund Number

- Use the Request for Grant Fund Number form and submit to the Office of Sponsored Research and Projects.
- Your grant will be assigned a 6-digit fund (budget) number (e.g. 24xxxx).
- For foundation grants, the Office of Sponsored Research and Projects will send the check to that budget when it arrives.
- Federal grants pay by reimbursement. There are no funds deposited from which to spend.

Managing Your Grant Budget

- Create a spreadsheet for your grant that shows each of the grant years.
- Create categories of the different types of expenses you have.
- Record all expenditures on your spreadsheet.
- Check Self-Service Banner to verify charges. (Check for missing charges, overcharges, undercharges.)
 - Banner years are based on Bethel's fiscal year, June 1 to May 31.

Requesting Funds and Making Charges

- For stipends, for Bethel personnel use the Request for Employee Payroll Payment form (Human Resources).
 - Second signature should be the Director of Sponsored Research and Projects.
- For reimbursements, use the Request for Payment form (Business Office).
 - Second signature should be the Director of Sponsored Research and Projects.
- For payments, such as honoraria to non-Bethel individuals, use the Request for Payment form (Business Office).
- For travel, use the Business Expense Report (Business Office).
- For faculty load (course release), use the Request for Load for Grant Funded Work form (Sponsored Research and Projects).

Accounts to Charge To

- Income = 5903
- TEUs/Course Release(s) for full-time faculty = 6021
- TEUs/Course Release(s) for part-time faculty = 6022
- Stipends for Bethel personnel = 6029 *
- Benefits for Bethel personnel = 6201 (this will happen automatically)
- Supplies = 7001
- Printing = 7210

- Travel = 7301
- Stipends/Honoraria for non-Bethel personnel = 7452
- Catering = 7615

* Please note this is a change from the use of account 6028.
This will enable corresponding benefits to be charged at a lower rate.

Reports

- The PI is responsible for preparing all reports in advance of the agency/foundations deadline.
- A copy of the report must be submitted to the Office of Sponsored Research and Projects in advance of the deadline in time for the Director to review the report.

Business Office

- Martin Anderson handles grant budgets.

Self-Service Banner Budget Queries

The screenshot shows the 'Banner Budget Queries for Grants' web application. The browser title is 'BLink - My Bethel Link - Mozilla Firefox'. The URL is 'https://blink.bethel.edu/render_UserLayoutRootNode.u?P_tparam=utf&utf=https:%2f%2fblink.bethel.edu%2f'. The page header includes 'BETHEL UNIVERSITY' and navigation links like 'E-mail', 'Groups', 'Moodle', 'Blackboard', 'Directory', 'Banner', 'Sitemap', 'Logout', and 'Help'. The main content area is titled 'Budget Queries' and 'Banner Budget Queries for Grants'. It contains a form with the following fields and annotations:

- Fiscal year:** 2011 (dropdown)
- Fiscal period:** (dropdown)
- Comparison Fiscal year:** None (dropdown)
- Comparison Fiscal period:** (dropdown)
- Commitment Type:** All (dropdown)
- Chart of Accounts:** 1 (dropdown)
- Fund:** 211264 (dropdown) - Annotation: 'For Grants: Put Grant Fund number here (6 digits beginning with 24)'
- Organization:** 00000 (dropdown) - Annotation: 'For Grants: Put 00000 here'
- Grant:** (dropdown)
- Account:** (dropdown)
- Program:** (dropdown)
- Activity:** (dropdown)
- Location:** (dropdown)
- Fund Type:** (dropdown)
- Account Type:** (dropdown)

Additional annotations and instructions on the page:

- 'Must do query for each year. Banner does not keep running total' (with arrows pointing to the Fiscal year and Comparison Fiscal year dropdowns)
- 'Include Revenue Accounts' (checkbox, checked)
- 'Save Query as:' (text input field)
- 'Shared' (checkbox, unchecked)

The Windows taskbar at the bottom shows the Start button, several open applications (Inbox, FW: Friend..., RE: Friends..., BLink - M..., ScreenShot..., attachment..., Microsoft E...), and the system clock showing 10:36 AM.