TO: ResInfo, RASG, Business Managers

FROM: Vanessa Peoples, Deputy Director Office of Sponsored Research

RE: OSR budget controls

DATE: October 5, 2015

As a result of the recent OSR transformation and stabilization activities, OSR has been looking at ways to improve efficiency and reduce the administrative burden of managing grants for both campus units and OSR. Effective 10/5/15, OSR will be updating the KK control child option on all 5xxxxx projects to track without budget, allowing campus increased flexibility on spending amongst all budget categories. OSR will continue to load detailed budgets as applicable, which should continue to be used as a guide for allowable spending, however the system control will be maintained at a higher level (i.e. overall project budget). This change will eliminate the need for unnecessary budget revisions.

A project specific budget allowability code is located on the grant details tab in Infoporte, this will provide initial guidance on re-budget authority. Please note some awards (i.e. state contracts, federal training and fellowship grants) may require prior agency approval to revise the approved budget. For additional information on rebudgeting restrictions and allowable charges, please refer to the terms and conditions of your award.

Please note the importance of using the correct fund and source when entering transactions related to a project. OSR assigns a specific fund, source and department when setting up all new projects. The fund and source values are located on the RAMSeS new project ID notification email that is generated when a new project ID is created. In addition, the fund and source can be located on the budget when viewing the budget overview in ConnectCarolina and in InfoPorte.

If you have any questions please contact Vanessa Peoples (vpeoples@email.unc.edu) or Brian Collier (bcollier@email.unc.edu).