



Report updates for Grant Balances - Departments

***Pamela Prince – Sponsored Program Accounting***

# Grant Balances - Departments

- What is changing?
  - ▣ Additional prompts and output on Grant Balances - Departments
- What exactly has been changed?
  - ▣ Prompts
    - Sponsor/Prime Sponsor
    - *Sponsor/Prime Sponsor Type*
    - Budget As of Date
    - Fund
  - ▣ Report output
    - *Prime Sponsor*
    - *Sponsor Award Reference Number*
    - *Fringe Rate, Tuition Remission Rate & GA Health Indicator*

# Grant Balances – Departments

## Grant Balances - Departments ⋮

**Instructions** Please enter a Cost Center or Cost Center Hierarchy.

Sponsor prompts will search the Sponsor & Prime Sponsor fields for the selected Sponsor or Sponsor Type. (Ex. Federal Agency will return grants where the award is funded by a Federal Agency or is Federal Pass Thru).

Budget as of Date should align with the Fiscal Period selected. This prompt excludes subsequent years of funding when running for a prior period.

See Job Aid on the LSU Workday Website for additional information.

Company	*	<input type="text" value="x Operational Companies"/> <span>⋮</span>
Period	*	<input type="text" value="x FY 2024-2025 - Mar"/> <span>⋮</span>
Award		<input type="text"/> <span>⋮</span>
Grant		<input type="text"/> <span>⋮</span>
Sponsor/Prime Sponsor		<input type="text"/> <span>⋮</span>
Sponsor/Prime Sponsor Type		<input type="text"/> <span>⋮</span>

Budget as of Date	<input type="text" value="03/11/2025"/>
Cost Center	<input type="text"/> <span>⋮</span>
Cost Center Hierarchy	<input type="text"/> <span>⋮</span>
Fund	<input type="text"/> <span>⋮</span>
Include Grant Hierarchies	<input type="text"/> <span>⋮</span>
Exclude Grant Hierarchies	<input type="text" value="x Cost Sharing   Paper Entries"/> <span>⋮</span>

# Grant Balances – Departments

242 items

Grant	Grant Name	Award	Cost Center	Sponsor	Prime Sponsor	Sponsor Award Reference Number	Lifecycle Status	Principal Investigator	Expiration Date
GR-00000405	LSUAM   protoDUNE Field Cage	AWD-000343	CC00147 LSUAM   Col of SCI   Physics and Astronomy	Brookhaven Science Associates, LLC   01	US Department of Energy (DOE)	321984	Close in Progress	Thomas J Kutter (00012294)	09/30/2018

Grant	Fixed Price/Cost Reimbursable	F&A: Basis   Rate	Fringe Rate	Tuition Remission Rate	GA Health (Y/N)	Budget	Expenditures	Ledger Balance	Encumbrances	Tentative Balance	Unpaid Invoices	Expiration Date
GR-00001164	CT0158 Cost Reimbursable	MTDC   26%	41%	35%	No	809,028.00	540,006.37	269,021.63	48.93	268,972.70	Customer Invoice: CI-0000072656 Customer Invoice: CI-0000074501 Customer Invoice: CI-0000075342	/28/2025

Billed Amount	In Progress Transactions - No F&A		
	Supplier Invoices (Non-PO)	Expense Reports	Journals
3,372,083.71	0.00	3,128.17	0.00

# Grant Balances – Departments Logic

- How do the prompts work?
  - Sponsor/Prime Sponsor – Searches for the Sponsor and/or Prime Sponsor for the entered parameters
  - Sponsor/Prime Sponsor Type – Searches the Sponsor and/or Prime Sponsor for the selected Sponsor Type (Federal Agency)
  - Budget as of Date – limits based on the Budget; Do NOT leave blank
  - Fund – Searches Journal Line activity

# Report Suggestions

- Report of **all Federal and Fed Pass Thru Grants**
  - ▣ Sponsor/Prime Sponsor Type = *Federal Agency*
  - ▣ Budget as of Date = Today's Date
  - ▣ CC/CCH
  
- Report of **all direct Federal**
  - ▣ Sponsor/Prime Sponsor Type = Federal Agency
  - ▣ Fund = FD251
  - ▣ CC/CCH

# Scheduled Reports

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- The prompts or saved filter will need to be updated:
  - ▣ Must include Budget As of Date