**Task ID: GM001**

# Name: Facilities & Administration

# Due Date: January 25, 2012

**Complexity:**

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**Priority:**

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**Resources:**

The following agency contacts should be involved in completing this task:

* Projects Manager
* Grants Manager

**Applicable Agencies:**

* All agencies using the Grants module in SMART

**Overview:**

The Grants module comes delivered with a process that can calculate and bill Facilities and Administration (F&A) costs. You may currently use the term indirect costs and for purposes of this task, consider the terms F&A and indirect costs synonymous. Although indirect costs can be derived several different ways, the most common is by application of a rate to a cost basis. The rate is generally approved by the grant sponsor, either by a periodically negotiated Indirect Cost Rate Agreement or included as Terms and Conditions of the individual grant. The Grants module includes tables to store F&A rates and bases that are used to help calculate the grant budget proposal and the indirect costs related to grant transactions. This is done automatically with the proper setup of the tables. These tables will be agency-maintained after go-live.

**What will the SMART Team do with this information:**

The SMART Project Projects/Grants Team will configure the F&A pages in the Grants module with agency-specific values, which will provide information needed to calculate grant indirect costs.

**Action Required:**

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| **1. Verify that Microsoft Excel has been loaded on your computer and is functional. You will need it to complete this task.** |

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| **2. Open the SMART F&A Template (GM001\_F&A.xls).** |

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| **3. Complete the Agency information on the “Questions” tab (Agency Name, Prepared By, Title & Email Address). This information will auto-populate on the other tabs.** |

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| **4. Answer the questions on the “Questions” tab. Based on your answers to the questions, that will determine whether you need to complete all of the questions on the “Questions” tab.** |

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| **5. Based on your answer to the question from the “Questions” tab, you may need to complete the various tabs.** |
| *On the “Rate Type” tab, complete a listing of your agency's indirect rate information for rates that you have approved, either by Indirect Cost Rate Agreement or as terms and conditions of your grants. This is the rate that you are allowed to be reimbursed for your indirect costs.**On the “Sponsor Rate” tab, complete a listing of your indirect rate information for specific sponsors. You will include the rate type, sponsor, F&A rate percent, description, and effective date of agreement.**On the “Institution Rate” tab, complete a listing of your indirect rate information for your agency. You may also have an Institution F&A rate that is different from your Sponsor rate and that you are allowed to use to apply to your cost shared costs and claim as cost share. You will include the rate type, F&A rate agreement number, rate status, F&A rate percent, description, sponsor regional office, and negotiation date.**If you have any questions while completing this task, you may contact the SMART Projects/Grants Team at Sarah.Tongier@da.ks.gov. Please include “Grants Configuration” in the subject line of your email.* |

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| ***6. Save your final document.*** |
| *File Name = XXX\_GM001\_F&A**\*Replace XXX with your agency number.* |

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| ***7. Submit the final document.*** |
| *Once the task is complete, e-mail\* the finalized document to the SMART Projects/Grants Team at* *Sarah.Tongier@da.ks.gov**.* *\*Please include the Task Name and Agency in the subject line of your email.* |

**Supporting Materials & Resources:**

* Your agency’s federally-negotiated F&A rate agreement