Contracts and Grants Accounting

Department Contact Maintenance

C&G Training Presentation

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Last updated: 10-29-15

Department Contact Maintenance

OBJECTIVE : CGA uses the information in Department Contacts to notify individuals associated with a specific department/unit about award activities in their area

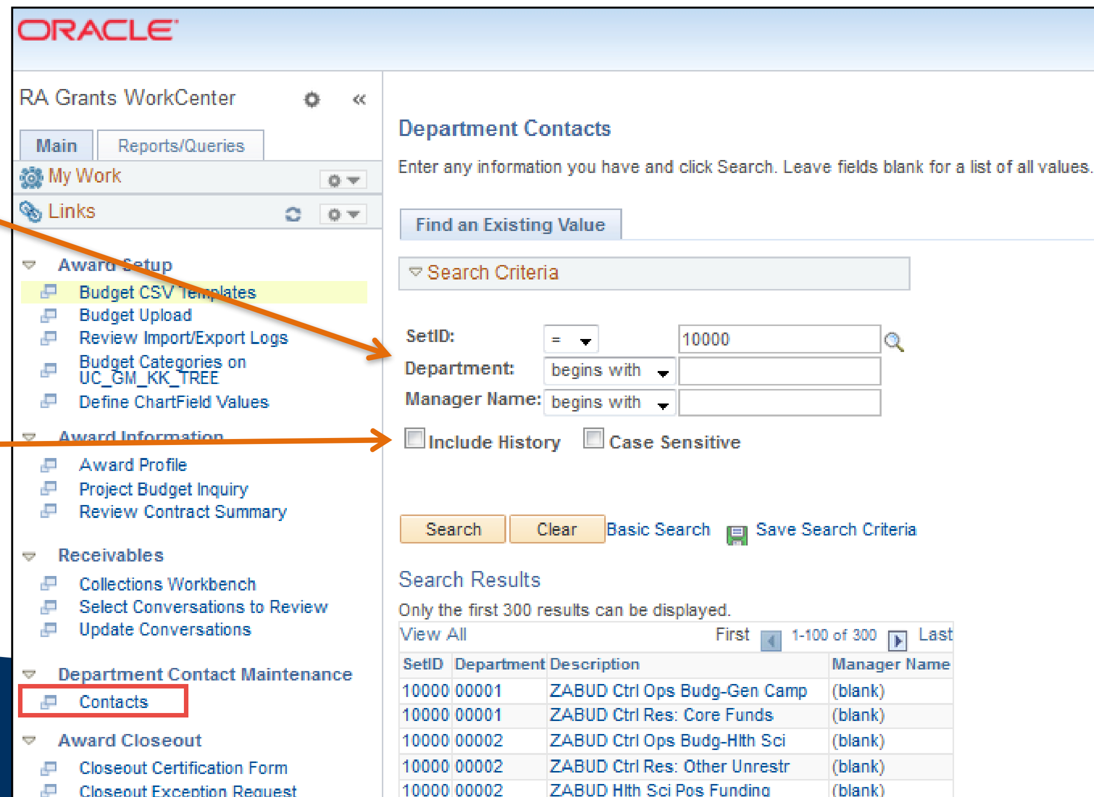
- **It is incumbent upon Departments to keep this Contact information current**
  - Typically, only Supervisors and Managers will be updating the Department Contact information, but this is left to the Department's discretion

Department Contacts in BFS - Search

- **Navigation:** Favorites ▾ | Main Menu ▾ › Grants ▾ › RA Grants WorkCenter › Contacts
  - Main Menu > Grants > RA Grants WorkCenter > Contacts

Once you have clicked the *Contacts* link, search by the Department field (which is DeptID #) only.

Be sure to select Include History.



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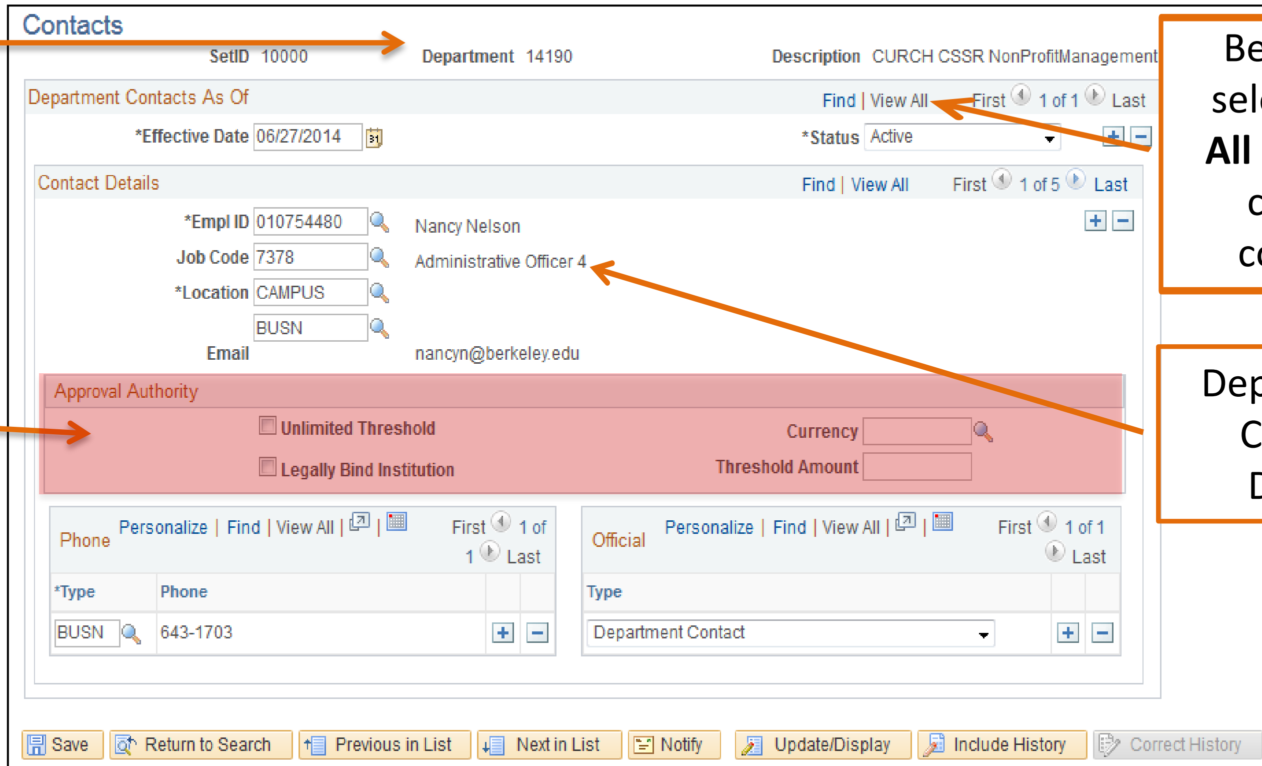
Department Contacts in BFS – Contacts Page

- **The Contacts page opens to the selected Department**

Department Information

Approval Authority fields will *not* be utilized



Be sure to select **View All** to see all current contacts

Department Contact Details

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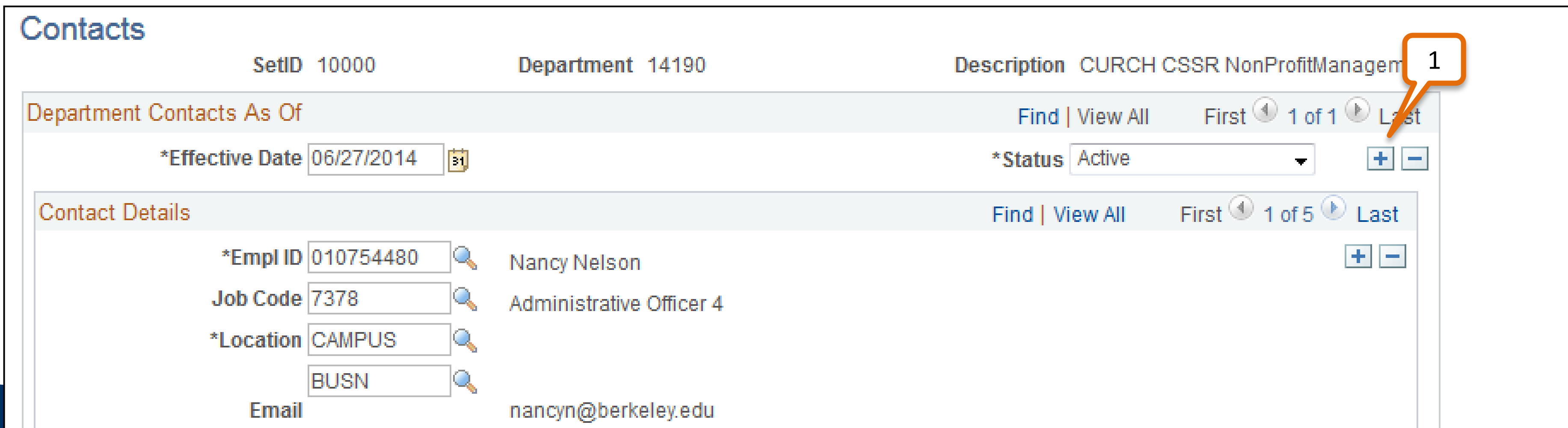
Department Contacts in BFS – Add/Update Contact

- **Add/Updating a Contact**
  1. Whether you are adding a new contact, or updating an existing contact, always create a new effective dated row by clicking the "+" button under the "Department Contacts As Of" header

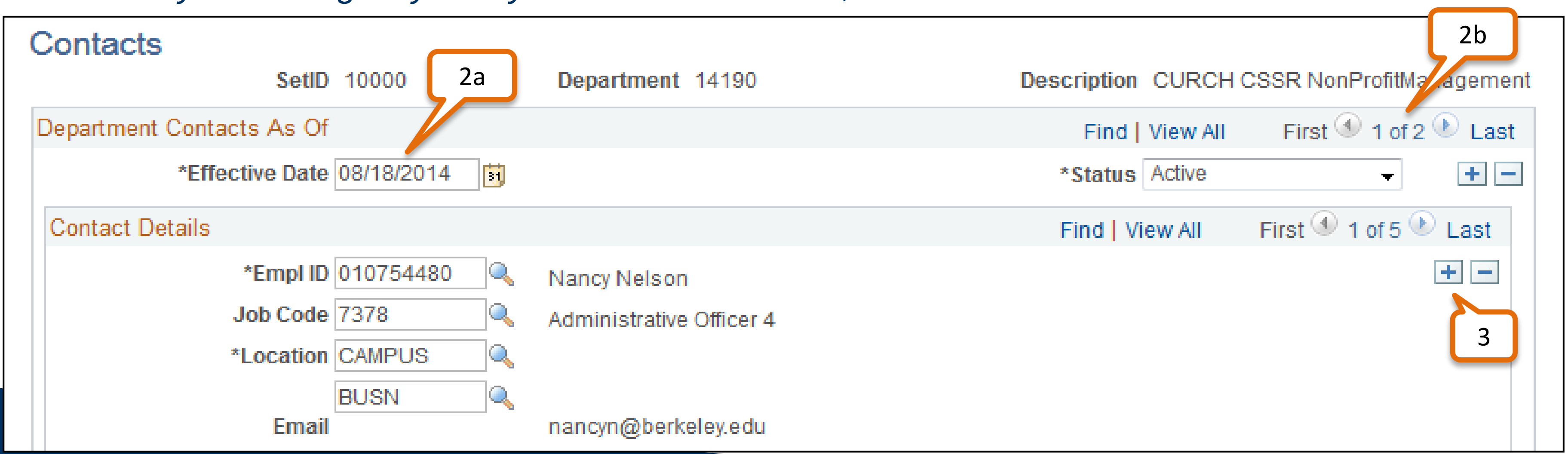
_*Note__: Attempting to update or add a new contact without creating a newly effective dated row will result in a "correct history" error_



Department Contacts in BFS – Add/Update Contact

- **Add/Updating a Contact**
  2. Any changes to the Department Contacts (new contact, update existing contact) should be made to this new effective dated row
     a. Notice that the Effective Date defaults to todays date
     b. A new row is created, with the most current effective dated row identified first
  3. Click the "+" under the **Contact Details** header to create a new Contact

**Note*: By amending only newly effective dated rows, historical records remain intact*



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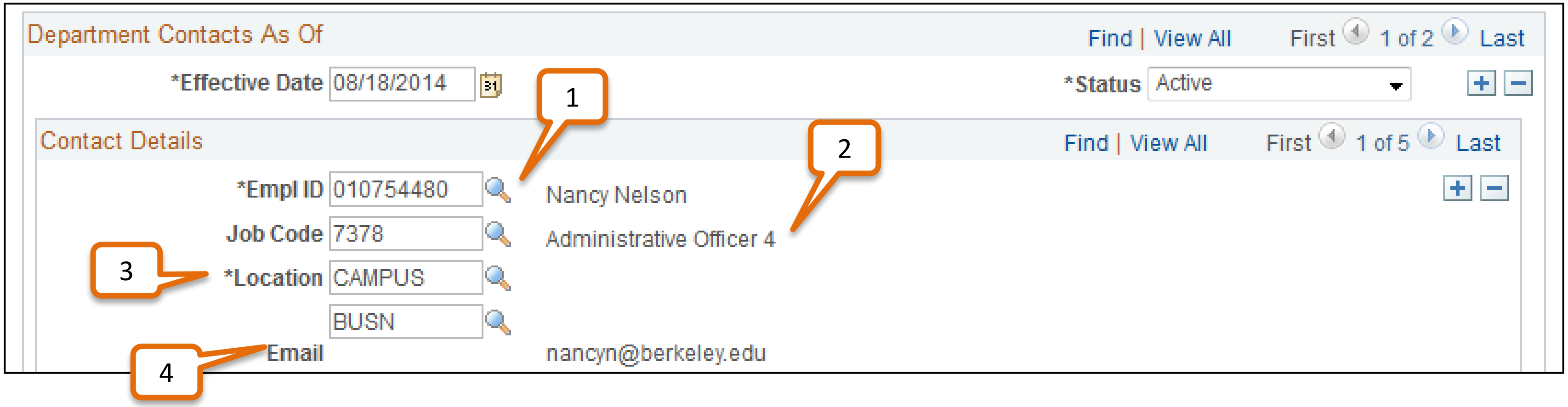
Department Contacts in BFS – Update Contact Details



Updating Contact Details

1. Empl ID - drives Job Code, Location and Email field values
2. Job Code – auto-populates from Empl ID selection
3. Location – auto-populates from Empl ID selection
4. Email – auto-populate from Empl ID selection

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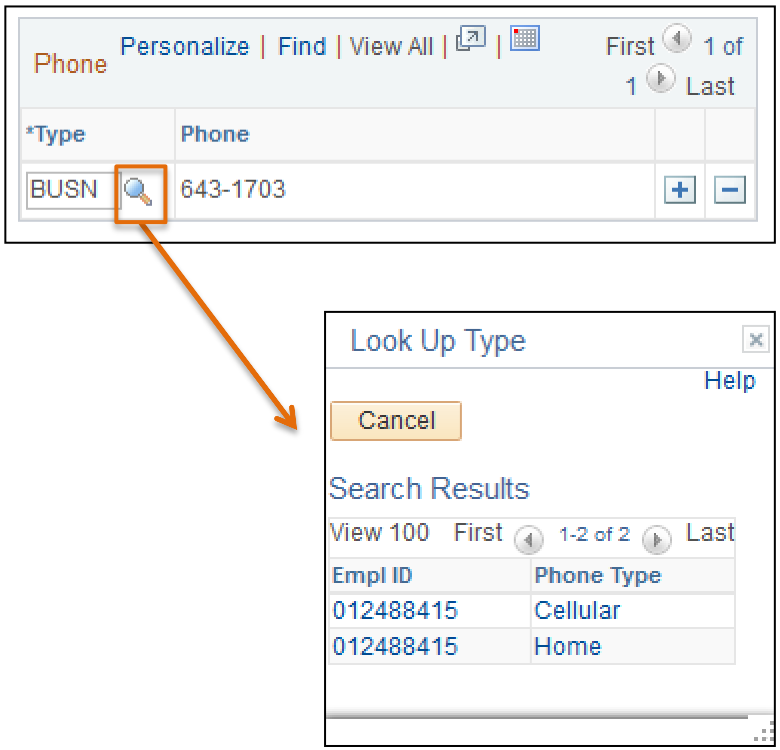
Department Contacts in BFS – Update Contact Phone

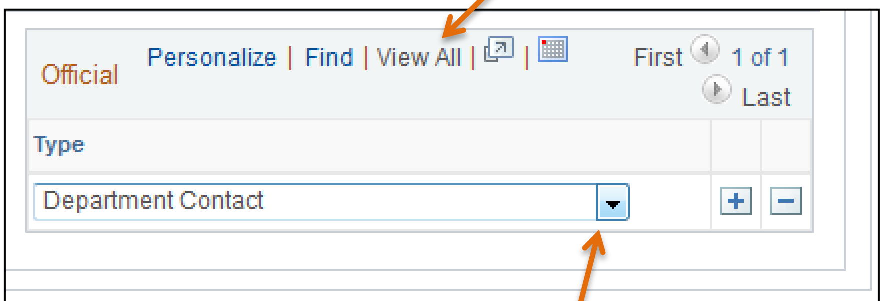


Contact Phone Type

- Will default from Empl ID selection
- Typically, options include:
  - Business
  - Home
  - Cellular

Department Contacts in BFS – Update Contact Type

Select *View All* for a complete listing of assigned Contact Types.



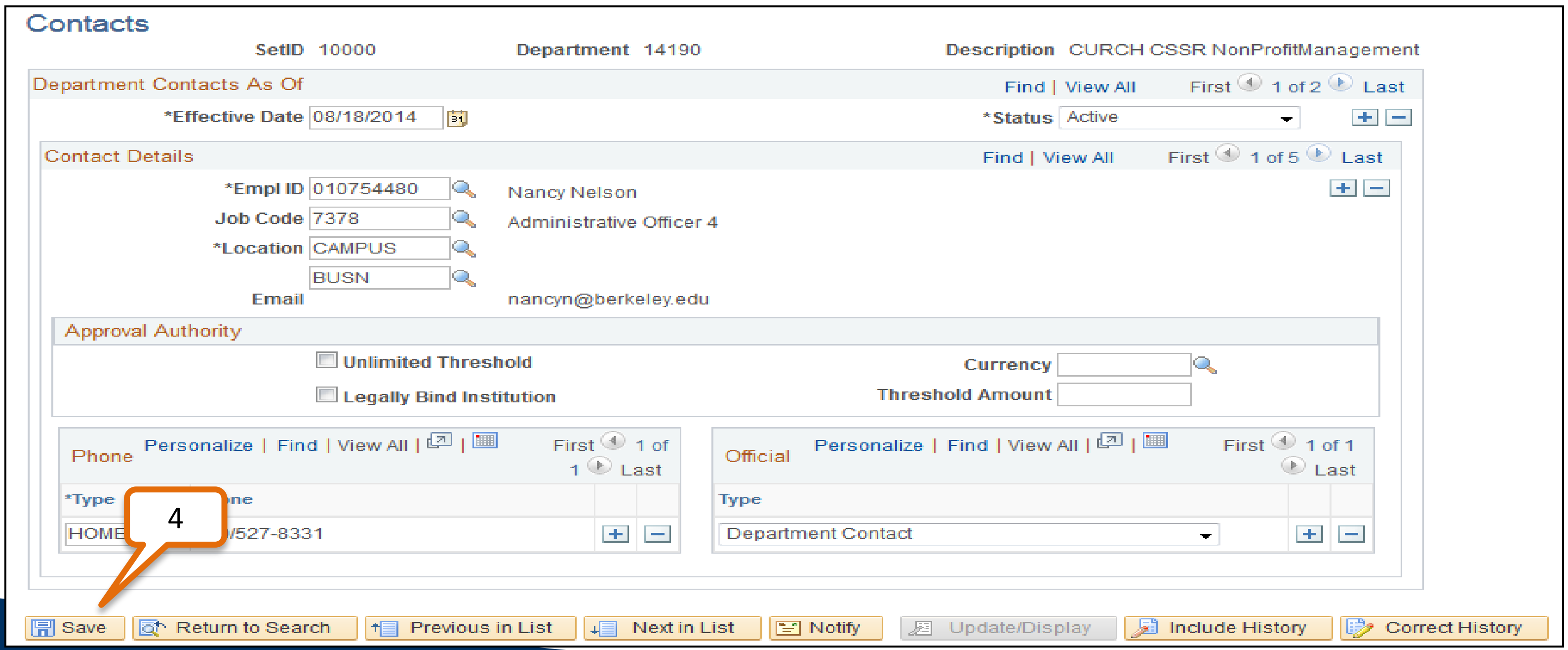
Open the drop-down menu to select the appropriate Contact Type. If a contact holds multiple Contact Types within a Department (i.e. Dean and Department Manager), click the (+) arrow to add a second row.

Department Contact Types

- Dean
- CAO
- Department Chair
- Department Manager
- CSS – RA Manager
- CSS – RA Supervisor
- Effort Reporting Contact
- Effort Reporting Coordinator

Department Contacts in BFS – Saving Changes

- **Add/Updating a Contact**
  - Once all changes have been made, click the Save button to finalize all changes



Associating Contacts with an Award

- Going forward, the **Post-Award Administrator field** will associate Post-Award Administrators (Department RAs) to an Award
- Phasing out use of the Grants Administrator hyperlink on Award Profile page

The Post-Award Administrator field within the Award Profile will be maintained by CGA, but it is the Departmental RA's responsibility to maintain the underlying Department Contacts information

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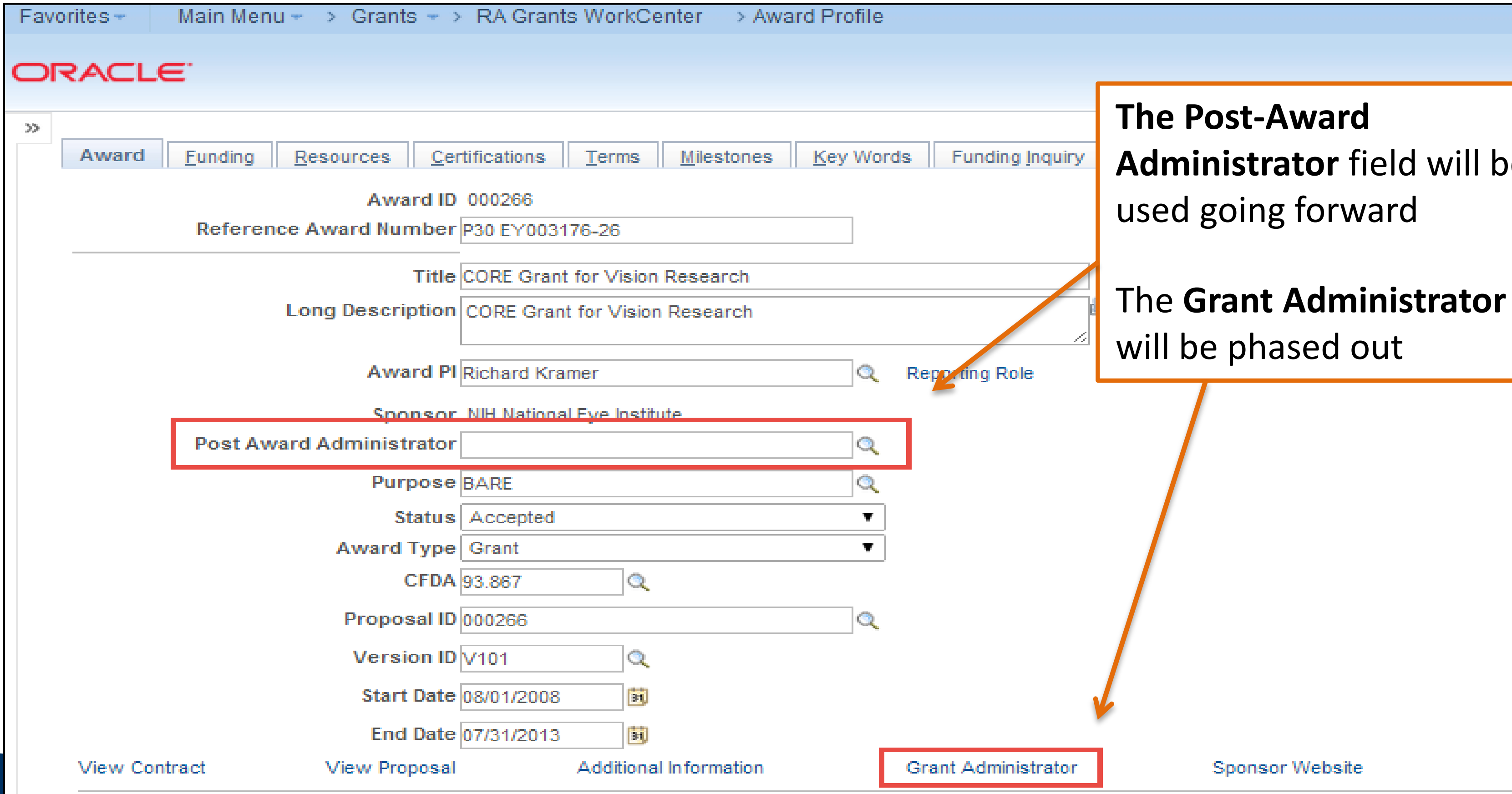
Associating Contacts with an Award – Award Profile Page



The Post-Award Administrator field will be used going forward

The **Grant Administrator** link will be phased out

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Contracts & Grants Implementation Project

http://controller.berkeley.edu/departments/contracts-grants-accounting

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