



Sponsored Programs Quick Tip: Reports to Run Quarterly for Effective Grants Management

Unreconciled Sponsored Accounts

Purpose

Identifies all accounts with an expense variance. In order to close accounts, the expenses posted to each account must be equal to the final figure of expenses reported to the sponsor. This report displays the exception to this rule.

One could run this report if a PI was leaving the university to identify their accounts in need of reconciliation and closeout.

Parameters

- Run for 7/1/99 to six months ago
- Keep parameters to a minimum (only include tub and org #)
- Could also be run by PI or by Sponsor

Segments

Purpose

Identifies all segments (funds) for a particular Tub, Org, Sponsor, and/or PI.

You can run this report by PI to give your PI a snapshot of all obligations and expenses on active awards by award.

The segments report can also be used to identify those accounts that are ending in 120 days or less to enable grants managers to either request a no cost extension or begin the account reconciliation process.

This can be used to review the financial status of awards and could also be used to review your entries for the 'other support' section of your current proposal.

Parameters

- Run this report for your org value and choose anticipated end date of Next 120 days
- Run this report by PI for all active and pending segments in their portfolio
- One could add a column to identify the amount remaining (obligated less expenses) and or the % remaining on each award

Scheduled Reports

Purpose

Scheduled Reports is used by grant administrators to determine what reports are due to a sponsor for a given segment. Sponsored Programs managers use this report to monitor portfolio distribution assignments and to track how many reports are due for a given time period.

This can be used to identify how many progress reports are due in the next three months and who the sponsors are.

Parameters

Run this report for due dates 1/1/99 to the end of the next three months.

You could run this by PI as well.

Sponsored Accounts

Purpose

The sponsored accounts report summarizes information by account group for each project. The report could be used to review dates, income expenses and account allocation for each account.

This report will also identify the at risk and/or restricted status of each account, so that one could review award status and the expenses charges to at risk and /or restricted accounts.

Parameters

Run this report with your tub and org and select active segments and active accounts. One could also select accounts where the at risk flag and/or restricted flag is set to yes.

To access CREW:

<https://crew.cadm.harvard.edu>

OR

Via the Reporting link on the [GMAS](#) homepage

Got Questions???

Contact your [OSP representative](#)

OR

[CREW Online Help](#) on ABLE