



Pre and Post Award Guidelines for EPIC

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UNC CHARLOTTE

Energy Production and Infrastructure Center

Hiring Research Assistants on Grant Funds

- ▶ Required info, before the process can begin:
 - ▶ Name
 - ▶ 800#
 - ▶ An I-9 card
 - ▶ Fund number to charge
 - ▶ Start and End Dates of employment
 - ▶ Hours per week
 - ▶ Pay amount (either salary or hourly)
 - ▶ A job description
 - ▶ Emailed authorization from PI to pay the required tuition, fees, and health insurance for grad students



New process alert!! GASP can no longer be nominated by the admin through the eGA system! For any GASP nominations, the PI must see the Graduate Student Director in the student's department.

[Click Here To Access Lab, Funding, Student Hiring and Travel Forms](#)

Tuition for *Grad* Students on Grant Funds

Full tuition, fees, and health insurance amounts must be paid by the grant for each RA working on the grant.

- ▶ **Tuition:** The NC Resident tuition amount (currently \$2,168.50 per semester) must be paid from the grant, essentially reimbursing the Grad School for GASP for the in-state tuition portion (per GCA/University policy).
 - ▶ GASP will still cover the out of state tuition amount.
- ▶ **Fees:** The Educational Fees (currently \$2,692 per semester) must be paid from the grant (per the COE Dean).
- ▶ **Health Insurance:** The Student Health Insurance (currently \$1,313.50 per semester) must be paid from the grant, essentially reimbursing the Grad School for GASP on the health insurance (per GCA/University policy).
- ▶ **GASP:** To qualify for GASP the Ph.D student must have an eGA for the full academic year (fall semester and spring semester). The eGA must be for at least 10 hours per week, and a total of \$3,500 per semester (\$7,000 for the academic year).

Tuition exceptions...

- ▶ Full tuition, fees, and health insurance amounts must be paid by the grant for each RA working on the grant unless:
 - ▶ The award is a state funded grant (CSI or ROI) not allowing these items in the budget.
 - ▶ If at the proposal stage an exclusion waiver was requested by the PI and approved by the Dean.
 - ▶ If the student is not enrolled in a full 9 credit hour semester, the tuition, fees, and health insurance paid for them can be reduced to the amount owed by the student.

EPIC Recharge Unit Labs

- ▶ High Bay: Dr. Youngjin Park, Manager
 - ▶ Flexible Energy: Dr. Somasundaram Essakiappan, Manager
 - ▶ Duke Energy Smart Grid: Dr. Behnaz Papari, Manager
 - ▶ Energy and Environmental: Mr. Bill Boivin, Manager
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- ▶ These labs make up the EPIC Recharge Unit. Each lab has maintenance and a cost associated with running the lab.
 - ▶ Per GCA guidelines, usage of the labs must be billed by the hour. No freebies!
 - ▶ Be sure to contact the Lab Manager for use of these labs, and hourly rate information during the proposal stage, to insure that what you are proposing is feasible and budgeted appropriately.
 - ▶ Each proposal will be reviewed to insure lab fees are included when appropriate, prior to approval in NORM.
 - ▶ Lab Manager approved use of these labs will be invoiced and charged to the grant fund. If not budgeted for at the proposal stage, a budget revision will be needed to cover these costs. Depending on the sponsor, this could be problematic if not budgeted for during the proposal.
 - ▶ RU Lab fees cannot be used to meet cost share commitments to sponsors.

Cost Share

- ▶ Do not commit cost sharing unless it is required by the sponsor. UNC Charlotte does not allow voluntary cost share.
- ▶ The phrase “Cost Share in-kind” is misleading.
 - ▶ All Cost Share is actual dollars spent, either on salary or other expenses.
 - ▶ Third Party (not UNC Charlotte) contributes or donates cash or services or other allowable items to the project. Any third party cost share commitment requires a cost share commitment letter signed by the institution.
 - ▶ Cost Share is usually reported on a quarterly basis.
- ▶ Cost share on salary (effort or time) is the amount of your salary already being paid by the department for your normal job duties, part of which is used for research.
- ▶ Between cost shared effort, and release time, some effort needs to be reserved that is not research related activities. You cannot go over 100% of your effort in a given year, whether it's research (cost shared or released) or teaching, having meetings, etc. (Example: 15% of your effort reserved for non-research related activities)

Travel “must haves”

- ▶ Travel needs, before the process can begin
2 weeks prior to travel:
 - ▶ A travel authorization form must be initiated by the traveler
 - ▶ Go to epic.uncc.edu; People, Student/Faculty Forms, Travel Forms for the most recently updated form. The Travel Office updates them often.
- ▶ Fill out what you know... Your name, 800#, address, email, destination, departure date, return date, business purpose, estimated expenses, and fund(s)
- ▶ Email the form to the admin responsible for that fund to fill in the rest
- ▶ Select flights, and email the details
- ▶ Select hotel, and email the details
- ▶ Email link to registration, and be available for questions (some are lengthy and have detailed questions)
- ▶ Email itinerary or link to itinerary
- ▶ Stop by to sign form
- ▶ Please don't wait until the day before your trip!

TRAVEL AUTHORIZATION FORM (TA)
 -- Complete, sign and submit this form at least two weeks prior to departure date --

☐ No ☐ Yes Is this a revision of a previously-submitted Travel Authorization? ☐ No ☐ Yes Group travel? ☐ No ☐ Yes Is traveler also a student? ☐ No ☐ Yes Employee or Non-Employee?

I. Header Please complete all fields below

Traveler's Name		UNC Charlotte ID #	
Org Code	Name of College/Department	Contact Name	Contact's Phone
Traveler's Street Address		Traveler's City/State/Zip	Pmt. Type
Traveler's Destination (City, State)		Departure Date	Return Date
Destination Type		Business Purpose (Attach documentation)	
Additional Comments			

II. Estimated Expenses (Itemization is optional, but must enter total)

Estimated Expenses	Amount	Payment Method	Comments
Airfare		--Select--	
Hotel (Room + Tax)		--Select--	
Registration Fees		--Select--	
Parking / Tolls		--Select--	
Taxi / Bus / Train		--Select--	
Rental Car / Gas		--Select--	
Other (explain)		--Select--	
Meals		Out of Pocket	
Mileage	\$ -	Estimated mileage (roundtrip)	
Total Expenses	\$ -	Must enter total estimated expenses	
Total Out of Pocket	\$ -	(Excludes airfare, lodging, or registration fees)	

III. Funding

	Fund 1	Fund 2	Fund 3
Fund(s) to be charged			
Fund Limit (optional)	-		
Fund Approver Initials <small>Required if you are not the custodian of funds(s)</small>			

At least one fund must be entered

IV. Approval

Prior Approval Required by Supervisor	Signatures
<small>Please complete all fields below</small>	
Indicate if any of the following apply to this trip:	
Will personal travel days occur between departure and return dates? (If yes, and airfare involved, a same day cost comparison must be attached)	
Yes <input type="checkbox"/> Excess lodging rates authorized? (above substance rates)	
No <input type="checkbox"/> Vehicle rental authorized?	
No <input type="checkbox"/> Federal per diem meal rates authorized? (int'l travel only)	
No <input type="checkbox"/> Business-class airfare authorized?	
	Signature of Traveler Date
	Supervisor's Printed Name Supervisor's Signature Date

UNC Charlotte - Version 8.05.2019 TA TRAVEL AUTHORIZATION

Purchase Orders and PCard

▶ 49er Mart:

- ▶ This our first stop for placing orders.
- ▶ Hired students should have access to build and assign a cart to the admin for a more efficient ordering process.
- ▶ Then an email should go to the PI, copying the admin, asking for PI approval. Orders will not be placed without PI approval.

▶ Pcard:

- ▶ A link to place the order can be emailed, or the student can bring his/her laptop with the item ready for the card information to be entered.
- ▶ Pcard can only be used if the item(s) is not available through 49er Mart, or is found much cheaper with an outside vendor. This may require Purchasing approval. So don't wait until the last minute!

EPIC Sponsored Awards by Fiscal Year

► Fiscal Year 2018 (7/1/17 - 6/30/18)

of Awards

29

Total Value of Awards

\$2,347,669

► Fiscal Year 2019 (7/1/18 - 6/30/19)

of Awards

32

Total Value of Awards

\$3,597,973

► Current Active Awards

of Awards

59

Total Value of Awards

\$12,849,644

Questions?