



GUIDE: Shell Project Setup

Introduction

Clemson University Office of Grants and Contracts Administration (GCA) is responsible for setting up a new award within three to five business days, with exception given during peak periods, upon receipt of executed award from Office of Sponsored Programs. From time-to-time, the PI may initiate work and departments may not be able to wait for full project setup and must request that a "Shell" project be established.

Definition

A Shell project may be established when a department needs a project number to be setup immediately so that certain, specific costs may be posted to the project. A Shell may be requested only when a fully executed award has been received by GCA. It is a minimal setup that only includes the following to be setup in Peoplesoft (PPS): project ID; Project GI panel; 2nd panel note; budget; Total Award panel; Sponsor panel; F&A tree; project activated.

Appropriate Reasons

- To meet payroll cutoff for adding/revising earnings distribution
- Purchase equipment or supplies for project
- To complete the GS61 for Grad students

Inappropriate Reasons

- To avoid waiting the three to five business days for GCA setup
- PI, co-investigator, or other wants to put a rush on setup without a specific reason
- Negotiation/execution of award took an unusual amount of time to complete
- Requesting a Shell project based on correspondence that an award will be made; these requests should continue to follow the RISK request process.

Guidelines for Shell Setup – not necessarily in following order

- College Post Award Contact (CPAC) requests Shell project in email (*in writing*) to appropriate GCA Grant Administrator or Coordinator (GCA GA); GCA GA may forward request along with PPN to a member of the GCA management team (Sr. Grants Administrators, GCA Accounting Mgr, or Director), if unable to immediately accommodate.
- Before setting up Shell project, check Conflict of Interest (COI-see *Personnel* in InfoEd) and Protocol (animals/human subjects-see *Approvals* in InfoEd)
- Create project ID number in GCA Project Grant Number Log
 - place "X" in Shell column; upon full setup enter in right column, "Shell to Active status on (date)"
- Complete Project GI PPS panel ("first panel");
 - Enter shortened title Description
 - set project to "Active" status
 - must use awarded start date; end date is set at 5 business dates from today/setup date; may only use earlier start date if 90-day pre-award costs are allowable;
 - enter Effective Dates, which typically match start date
 - enter Manager # (PI emplID) and Manager Name (PI name)
 - use new status, "Shell";
- Complete Selected Fields in the Total Award PPS panel:
 - start and end dates according to agreement
 - Commitment Control (Track or Control);
 - Award Status – "S";
 - Date Entered;
 - F&A Rate and F&A Cost Base
 - Acct Num (account number box) – click "Save"
- Enter PPN on Document PPS Panel
- Enter note to Project Descr GI PPS panel ("second panel");
 - Set up Shell project and enter initials; "Set up Shell project-XX"
- Setup Budget for entire awarded amount (parent and child)
- Add to F&A tree
- Enter subclass and sponsor on Sponsor PPS panel
- Start paper folder with printout of associated emails and salmon sheet and give to appropriate Grant Administrator, if not self
Notify CPAC and PI (and copy GCA GA, if not self) via email; subject line, "CU Shell Project XXX-XXXXXXX, PPN"