Managing Your HATCH, MULTISTATE RESEARCH (aka. “Hatch Regional” or “Hatch Multistate”), and MCINTIRE STENNIS Funds

As a result of the implementation of the Kuali Financial System at UH, we have lost some of the freedom that we had in the past in managing federal formula funds internally in CTAHR. Federal law restricts carryover of these funds, and the greater role that ORS now plays in managing these funds due to Kuali means that most PIs in CTAHR who receive these funds will now receive them in two accounts each year - one with “older” funds that must be expended by June 30, and one with “newer” funds that will have the usual September 30 federal deadline for expenditure.

We have no flexibility in these deadlines, so it is very important that departments and PIs check these accounts, note which of them are “older” funds, and expend those funds by the deadline each year. As a general rule, approximately half of the funds allocated to a PI through Supplemental Funding or any other means will be in the form of an account with “older” funds. So, each PI will receive at least two accounts now, where they only received one before, and they should always expend the “older” funds first.

Because of differences in the federal regulations on carryover of funds, this situation only applies to RESEARCH funds (Hatch, Multistate Research, and McIntire Stennis), and NOT to EXTENSION (Smith Lever) accounts.

PIs and Department APTs must look at the NAME (TITLE) of the accounts to see which are “older” funds with the June 30 expenditure deadline.

This year, these are the accounts, and deadlines, to be aware of in 2013:

Accounts with “old” funds:
- FY12-HA . . . (Hatch) MUST BE EXPENDED BY JUNE 30, 2013
- FY12-MS . . . (McIntire Stennis) MUST BE EXPENDED BY JUNE 30, 2013
- FY12-MSR . . . (Multi-State Research) MUST BE EXPENDED BY JUNE 30, 2013

Accounts with “newer” funds:
- FY13-HA . . . (Hatch) MUST BE EXPENDED BY SEPT 30, 2013
- FY13-MS . . . (McIntire Stennis) MUST BE EXPENDED BY SEPT 30, 2013
- FY13-MSR . . . (Multi-State Research) MUST BE EXPENDED BY SEPT 30, 2013

In similar fashion, research funds allocated in FY 2014 will be split between an “older” account beginning with “FY13- . . .” and a “newer” account beginning with “FY14- . . .”. Each year, the 7-digit account numbers will be different, but the title of the two accounts will always designate by “FYXX- . . .” whether the funds are “older” or “newer.”

Accounts containing “older” funds (those beginning with “FY12- . . .” this past year) CANNOT be used after June 30. Any expenditures after that date MUST use a different account.
Checking Account Balances in Kuali Using eThority

NOTE: All information below has been compiled by Adrian Lee, and is available both as PDFs and as training videos in the “Fiscal Information” section of the CTAHR Employees webpage at http://www.ctahr.hawaii.edu/site/employees.aspx

The links below are to PDF instruction sheets that are also included in this document. Additional and more through information is provided by the Office of Research Services at http://www.hawaii.edu/kualifinancial/?page=eThority&showSubMenu=training

Please check the websites above for updates, or if you have any problem following the instructions included here.

1. Log on to eThority:
   https://ethority.reports.hawaii.edu

   Login is your full UH email address (username@hawaii.edu)
   First-time login password is “Kual1!”

2. After first-time login, change your password as described in these instructions (might be easiest to use your UH password, but you may use anything):
   http://tinyurl.com/lex7b29

3. Follow these instructions to obtain the summary balances for 2, 3, and 5 accounts:
   http://tinyurl.com/kuhx5k4

4. Follow these instructions to obtain information on a specific account number:
   http://tinyurl.com/lpwm9xj
First Time User
Change Password

1) Log into eThority
   https://ethority.reports.hawaii.edu

   Login: Your UH Username@hawaii.edu
   Password: Kual1!

2) Select Configure from the menu option on the upper left.
Select User Setting ➔ Change Password

In the Change Password type in your new password twice
Select Save

After you have successfully changed your password, close the program and relogin with your new password.
Obtaining Balances for “2”, “3” and “5” Accounts with eThority

1) Log into eThority

2) In the upper right search box, type in “CTAHR PI Balance Report”

The system will return a search result for the Databook “CTAHR PI Balance Report”
3) Type in your UH User Name

EThority will prepare a report for your accounts that list you as the Account Supervisor for account starting with a 2, 3, 5 and endowment and fixed fee accounts that start with 4..

It will provide a summary total if you want a quick check for your accounts.

It will also allow you drill down obtaining more detail and breakdown between the figures.

The report will also reserve or encumber your payroll budget so the available balance will be for operational use. For a more accurate projection of your payroll figures, please contact your departmental APT or our fiscal specialist.

See next page for an example.
Combined budget and expenditures for all accounts in 2, 3, and 5

Individual summary balances for each account. You can select the + sign on the left to open more detail about the account.

Payroll is reserved or encumbered showing only net operational funds as a balance.

After you are done, close the program.
If you want more information about eThority and how to work with the system or program your own Databook, visit:

http://www.hawaii.edu/kualifinancial/?page=eThority&showSubMenu=training

There is a list of the training materials available for you to use.
Obtaining Balances with eThority

1) Log into eThority

2) In the upper right search box, type in “CTAHR”

   The system will return a search result for the Databook
   “CTAHR Account Number – Balance”

   Double click on the Databook
3) Type in your 7 digit Account number

EThority will prepare a report for your account.

It will provide a summary total if you want a quick check.

It will also allow you drill down obtaining more detail and breakdown between the figures.

See next page for an example.
After you are done, close the program.
If you want more information about eThority and how to work with the system or program your own Databook, visit.

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There is a list of the training materials available for you to use.