

# Grant in Aid: Project Funding Process

Revised December 2023

For the purpose of payment or reimbursement for project related expenses, please follow this guidance:

- If the reimbursement is for a current employee of Prisma Health (even in the Medical Group) the expense must be processed through the expense reporting system in Workday. (Tip sheets to [create an expense report for non travel](#) and [create an expense report for overnight travel](#).) If an employee of Prisma Health will be travelling, there is a form that needs to be approved BEFORE doing the steps in the link for "create an expense report for overnight travel". Please access the form "TravelForm\_Academics\_Mar 2023" and complete it. Please sign as the requestor and send to the email address on the form. It will be returned to you fully signed. After receiving this form back, you can then follow the steps in "create an expense report for overnight travel" and attach the signed form to the spend authorization request form in Workday. The default department for the expense will be the employee's home department. Please process this expense as normal and let John Ballentine and/or Cassandra Kohn know the details of the expense, to include employee name, project, department the expense was charged to, account and date. A journal entry can then be done to return the funds to the employee's home department. Please note: Current employees cannot be paid outside of the Prisma Health payroll system. If an employee needs to be paid for additional work, that needs to be submitted through Workday Help.
- If the reimbursement is for a USC or USC SOM employee, the employee must be reimbursed first through the appropriate system. Once that reimbursement process has begun, Prisma Health can reimburse USC or USC SOM. Best practice is to contact John Ballentine or Cassandra Kohn at the numbers / emails below before starting the process of reimbursement.
- If payment is to be made to any person or entity that is not listed above, please have the group or person produce an invoice showing the following detail: Invoice Number, Invoice Date, to whom remittance is to be made (must match what is on the W9), an itemized list of products purchased or services rendered, and a total amount owed. If this is the first time the vendor has processed payment with Prisma Health, or they have not turned in an invoice in over 1 year, please have them complete a [W9](#). Please note that the person/entity will be paid directly from Prisma Health. Here is the process to submit an invoice:
  - Write the following information on the invoice:
    - Cost Center: 70049544
    - Account: 64000
    - Spend ID: 6404
    - Study name (an abbreviated version is ok)
    - Have the Awardee sign the invoice to indicate approval.
  - Email this invoice as a PDF to [apinvoice@prismahealth.org](mailto:apinvoice@prismahealth.org). CC John Ballentine and Cassandra Kohn on the email.
- For publication fee reimbursement, refer to the [Publication Fee Request](#) document.

If the expense does not fit neatly into one of these, or there are problems with this process, please call or email, and we can talk through the details.



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**For projects awarded in the 2023-2024 year and after, please follow the below guidelines related to tracking your projects financially.**

A folder will be set up for each awardee on a Teams site. Inside of that folder will be an Excel sheet that is to be used for tracking expenses related to the project. This Excel sheet will be used for your final project report. All expenses related to the project must be added to this sheet. In addition, please load copies of pertinent invoices, receipts, etc. to this Teams folder. This will allow easy access to financial documentation related to the awarded project.

Best Regards,

**John Ballentine, MBA**

Exec Director for Academics Fin Admin  
3555 Harden St Ext, Ste 202  
Columbia, SC 29203  
803-434-4428 (office)  
803-386-4104 (cell)  
john.ballentine@prismahealth.org

**Cassandra Kohn**

Medical Education Assistant,  
Graduate Medical Education  
803-434-4426 (office)  
cassandra.kohn@prismahealth.org