**Administrator New Award Set-Up Checklist**

The purpose of this checklist is to aid administrators at the start-up of a new award to: review the award information to ensure accuracy, discuss award set-up with the Principal Investigator, ensure all needed project accounts are established and expenses appropriately allocated and documented.

**Review award notification received from OSPAWARD:**

\_\_\_\_ Read terms and conditions of award notice. Make note of any commitments/restrictions that will impact administrative and financial management of the award: effort commitments, budget restrictions, reporting and billing requirements, etc.

\_\_\_\_ Review OSP VCUeRA Snap Shot, notify OSP if any of the award data appears inaccurate

\_\_\_\_ Review sponsor awarded budget

\_\_\_\_ Review personnel commitments logged into VCUeRA, ensure Key Personnel commitments are accurate as reflected in the award. Request updates as needed.

**Review the award with the Principal Investigator:**

\_\_\_\_ Highlight important award terms and conditions for the PI such as: effort commitments, publication restriction, reporting and billing requirements, deadlines, etc.

\_\_\_\_ Review awarded budget with the PI and update internal budget plan as needed

\_\_\_\_ Get PI confirmation of initial effort allocation of all faculty/staff assigned to the project

\_\_\_\_ Review and complete the Project Management Designation Form

\_\_\_\_ Review Principal Investigator Project Management Checklist with PI.

\_\_\_\_ Provide Department Purchase Order Request Form to PI

\_\_\_\_ As applicable, work with the PI to finalize budget and develop a statement of work for all planned subawards

\_\_\_\_ As applicable, work with the PI and other collaborating departments to allocate budget to home department subprojects and confirm effort commitments for faculty/staff outside the home department

**Work with Grants and Contracts Accounting to establish project indexes:**

\_\_\_\_ Contact G&C to ensure an award index is established if you have not received written or e-mail correspondence identifying the new code(s) within 3 working days from OSP sending the award notification e-mail

\_\_\_\_ As applicable, request all necessary subaward indexes, subproject indexes, and cost share indexes for the project

\_\_\_\_ Provide a detail budget for G&C to load into Banner to include allocation of funds to subawards/accounts as applicable.

\_\_\_\_ Review all indexes created by G&C to ensure the responsible department is correct, FACR allocation is correct, Budget load is accurate, etc. (Banner screens FRAGRNT, FRMFUND, FRIGITD)

**After award has been established in Banner:**

\_\_\_\_ Process PAFs to add project personnel at the PI approved effort levels

\_\_\_\_ Notify collaborating departments to process PAFs of their faculty/staff, confirm effort levels

\_\_\_\_ Begin charging project costs to all indexces, to include cost share

\_\_\_\_ Submit subaward requests to OSP as applicable

\_\_\_\_ Develop a department grant file and financial reconciliation system to ensure grant records and all supporting documentation are stored appropriately