



CHSS Dean's Office – New Award Checklist for Research Administrators

The purpose of this checklist is to assist Research Administrators (RAs) at the start-up of a new award (federal and non-federal) once the award has been funded and fully set-up by the Office of Sponsored Research. The primary role of the RA in the set-up process is to review the award information, ensure accurate and correct set-up of the project specific F&A distribution, and of the budget while taking into consideration any project specific terms, and conditions and sponsor defined requirements.

1. Within 1 week of new award receipt read the award notice and review the following information for accuracy:

- Principal Investigator's name /Co-Investigator's name
- College, Department or Center receiving the award (verify applicable Grants and Contracts Org used)
- Sponsor awarded budget and total funding to date
- Facilities and Administrative Rate (F&A rate)
- Current budget period dates and the period of performance of the entire award

2. Read the terms and conditions of the award notice (including the email and the award documents from OSP) and make note of the following project specific items:

- Important terms and conditions outlined for the PI and the Research Administrator
- Any commitments/restrictions that will impact administrative and financial management of the award such as effort commitments, budget restrictions, publication restrictions, deadlines, special reporting
- Interim and final progress reports
- Technical tasks and deliverables
- Special requirements requests for award modifications (NCEs, rebudgets)

3. Check for the following budget specific expenses and contact the Dean's Office with any additional questions:

- Equipment purchases greater than \$5,000
- Food costs or workshop fees
- Participant support costs
- Human and animal research subjects
- Faculty effort, Academic Year and Summer Research salary
- GRA Assignments and Tuition/SGHI
- Cost share (Effort or DE)
- International Travel (Fly America Act applicable?)
- Subcontracts (subrecipient agreements are established by OSP)
- Consulting Services (consultant agreements are established by the RA creating a vendor eVA order)

4. Important New Award Tasks:

- Confirm that the budget lines entered in the financial system (MicroStrategy) match the awarded budget received in the notification
- Review and ensure that the project indirect distribution is set up correctly. To do that, run the [Grant Distribution Set-up Report](#) available in the [CHSS Grants](#) folder in MicroStrategy
- Required RCR training for students (undergraduate and graduate) and postdoctoral researchers receiving NSF funds (support from salary and/or stipends to conduct research on NSF grants)
- Confirm temporary and pooled positions have been set up in PatriotWeb
- Complete and submit a copy of the signature card that is included in the award notice

5. Important New Award Related Meetings:

- Reach out to the PI to set up an initial meeting to discuss award management and award specific spending: effort and other direct expenditures
- Reach out to the CHSS Dean's Office staff for any questions or concerns related to the new award
- Inform the PI about a project specific meeting available with the CHSS Dean's Office upon request