

## Department New Award Checklist

UO Grant No.: \_\_\_\_\_ E-PCS No. \_\_\_\_\_

<input checked="" type="checkbox"/>	<b>CHECKLIST</b>
	<p><b>Know the Requirements for The Award</b></p> <ul style="list-style-type: none"> <li>• Read the award documents thoroughly. Make sure you understand which rules, regulations, and requirements apply to this award.</li> <li>• Note important dates for reports, deliverables, and performance period and who is responsible for which reports. (Coordinate with your Post Award Team for reports that include financial information.)</li> <li>• Note any special terms and conditions for the award. (For example: extended record retention requirements, travel and purchase limitations, E-Verify, equipment disposition instructions, etc.)</li> </ul>
	<p><b>Human Resource Planning</b></p> <ul style="list-style-type: none"> <li>• Review personnel included in the grant proposal, including both direct and cost shared expenses.</li> <li>• Review the total effort commitments for key personnel to ensure the proposed level for this new project is possible, keeping in mind other commitments.</li> <li>• Complete PRF and/or PAA forms to allocate personnel to new project, working with HR and the department payroll administrator as necessary.</li> <li>• Contact your Post Award Team if a reduction in effort needs to be requested from the sponsor.</li> </ul>
	<p><b>Purchase Planning</b></p> <ul style="list-style-type: none"> <li>• Verify procurement process for budgeted equipment with Purchasing and initiate purchases.</li> <li>• Finalize the scope of work and other details for independent consultants and initiate the contracting process with Purchasing.</li> <li>• Comply with all UO and sponsor requirements for all expenditures. For federal awards (directly awarded or via a subaward from another institution) this includes OMB Circular A-21: Cost Principles for Educational Institutions.</li> </ul>
	<p><b>Subawards</b></p> <ul style="list-style-type: none"> <li>• Confirm the budget and scope of work documents with the subaward recipient. Include a schedule of reports you will need from the subawardee.</li> <li>• Confirm the details of the proposed subawards and complete a New Subagreement Request form for each (form and instructions available on the Sponsored Projects Services website).</li> </ul>
	<p><b>Cost Share</b></p> <ul style="list-style-type: none"> <li>• Proposed cost share becomes an obligation of the award. Review the cost share requirements and make a plan. Begin recording cost share as it occurs and through the life of the grant.</li> <li>• Review cost-shared effort commitments of the personnel as noted in the Human Resource Planning section above, and make necessary requests to HR and your Post Award Team.</li> <li>• For other UO cost share items, utilize the activity code in Banner to ensure inclusion in the cost sharing report. The activity code is the grant number, and will be in place throughout the life of the project. Using the activity code will ensure the expense is included in the cost sharing report in E-PCS.</li> <li>• Print cost-share summary from E-PCS to verify committed and accrued amounts.</li> <li>• Third Party cost share must be documented by the provider using the Third Party Cost Share Form and submitted to SPS to record in E-PCS.</li> </ul>
	<p><b>Reminders</b></p> <ul style="list-style-type: none"> <li>• All award expenses must be reasonable, allowable, allocable, and consistently applied.</li> <li>• Cost-shared expenses must meet the same allowability rules as direct expenses, unless directed by sponsor.</li> <li>• Attend DGA Meetings and other sponsored project administration educational opportunities.</li> <li>• If there is program income authorized on your award, refer to the SPS web-site Program Income page, and discuss with your Post Award Team.</li> <li>• Contact your Post Award Team with questions or concerns.</li> </ul>