Award Set-up Guidance for Departmental Administrators

Immediately after submission of the proposal, file proposal documents on Local Shared drive

- Use naming convention preferred by college/center/institute
- File copy of proposal
- File copy of proposal checklist
- File copy of solicitation
- File any documentation from C&G (submission confirmation, etc.)
- File PDF of approved webform
- File any approval emails (Cost share, reduced F&A, PI's agreement to submit a non-compliant document, etc.)

If an award is made, please forward a copy of the NOA to the C&G if they were not originally included in the award email.

- If the awarded budget is different than the proposed budget, the C&G will request that an F101 PS record be created and that the GA enter the budget updates to the F101 record.
- If the award includes Human Subjects, check with PI for IRB/IACUC approval. The RO cannot set up the award until IRB/IACUC approval is secured.

Once RO award set up process is complete, the GA will receive the COA and Notice of Award from the C&G

- **Review NOA**
  - Award number
  - Period of performance
  - Funding amount
  - ALN (previously CFDA)
  - Title
  - Award Terms & Conditions e.g., Export control, Confidentiality
  - Reporting deadlines
- **Review COA(s)**
  - Review award number, dates, title, and budget against your notes and the NOA
    - Review for potential subawards
    - Review for potential consultants
    - Review for potential tuition
  - Review for cost share
  - Review Terms
  - Review to ensure that Viewers/Approvers are correct, including PI and staff from other colleges
  - Forward award documentation to GAs outside of your college that have purpose codes on the award

- **Update C&P for PI (may depend on college/center/institute)**
  - Change status from "pending" to "current", modify project dates and budget amount if necessary
  - If these updates are made by the PI, make a note to review PI's updates
- **Make LAM Updates/Obligations**
  - **May need to check with PI on grads or other personnel not named in proposal**
- **Note Summer Salary**
- **Check if any JV's are needed (retroactive)**
- **If an NIH award, set up NIH Salary Cap reconciliation tool**
- **Set up budget projections**
- **Set up meeting with PI to go over report/projections**