

## Grants Management Checklist

Grant Name: \_\_\_\_\_

Date: \_\_\_\_\_

_____	_____	Copy of grant	_____	_____	Copy of grant's awards and terms
_____	_____	Copy of the line item budget	_____	_____	Review the grant's awards and terms
_____	_____	Copy of the Grant Approval Letter	_____	_____	Review a timeline for the grant's funds and review deadlines with the PI

\_\_\_\_\_ Train on the use of the *Expenditure Request Forms* (for basic purchases and I-Purchasing). **All expenses (including travel expenses) must be pre-approved through the Office of Sponsored Programs**

\_\_\_\_\_ Train on ORU's Time and Effort Reporting Procedures

\_\_\_\_\_ **The Principal Investigator will be sent a monthly financial statement (Cost Center Manager Reports) created by the accounting department to be reviewed and compared to their records.**

\_\_\_\_\_ Transferring funds from one account to/from the restricted grant account must be pre-approved by the Office of Sponsored Programs (OSP)

\_\_\_\_\_ PI will be notified by email once the funds have been received and are available

\_\_\_\_\_ **Closing Procedures:**

\_\_\_\_\_ 90 days prior to closing the grant, the PI will receive a *Notification of Close-out Letter* from the OSP.

\_\_\_\_\_ 90 days prior to closing the grant, contact the OSP if more time is needed to complete the project and/or spend the grant funds.

\_\_\_\_\_ 60 days prior to closing the grant, the PI must collect inventory and tagging lists from their department as well as the IT department. All lists must be submitted to the OSP at this time.

\_\_\_\_\_ 60 days prior to closing the grant, set a date for the "Thirty Day Meeting" to be held with the Office of Sponsored Programs \_\_\_\_\_

\_\_\_\_\_ 30 days prior to closing the grant, the PI must submit all narrative reports to the Sponsored Programs Office for review

- Reporting the results of the project evaluation
- How well were the objectives in the original proposal met
- What products, publications, deliverables created through the project

\_\_\_\_\_ "Thirty Day Meeting" with the Office of Sponsored Programs

- Review the project's results, cost sharing, and time and effort reports with the Office of Sponsored Programs
- Compare and sign all financial and narrative reports

\_\_\_\_\_  
Principal Investigator Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Office of Sponsored Programs

\_\_\_\_\_  
Date