

AWARD KICKOFF CHECKLIST

○ Award Details

Award Title			
Begin Date	End Date	Extension Date(s)	
Sponsor			
Agency Fund			
Cost Share (Match)			
PI	Phone	Email	
Grant Administrator		Phone	Email
Award Bookkeeper		Phone	Email

NOTES

○ Important Dates

Due date of financial reports		Due date of final report	
Due date of IACUC, IRB protocol renewals if required		Due date of subreports	
Sponsor deadlines for budget changes or extension approvals		Reporting frequency to agency	

○ Discussion Checklist with PI

Review:

<input type="checkbox"/>	Roles and Responsibilities of PI, bookkeeper, Office of Research		
<input type="checkbox"/>	University and sponsor requirements as they pertain to the project		
<input type="checkbox"/>	Budget restrictions – allowable, allocable, consistently treated		
<input type="checkbox"/>	Important performance dates (see table above)		
<input type="checkbox"/>	Data plan (confidentiality and security)		
<input type="checkbox"/>	Material transfer agreements (data sharing)		
<input type="checkbox"/>	Special expenses?		
<input type="checkbox"/>	RCR requirements		
<input type="checkbox"/>	Animals: IACUC protocols		
	Protocol #		Titles #
<input type="checkbox"/>	Human Subjects: IRB protocols and human subject requirements		
	Protocol #		Titles #
<input type="checkbox"/>	Program Income (Additive or Deductive)		
<input type="checkbox"/>	Intellectual Property: Are there contractual issues of who will own IP? Will project create IP with future monetary gains?		

<input type="checkbox"/>	HR plans: Who are you hiring? When will they begin? What are you paying that person to do?
<input type="checkbox"/>	Export Control: Are there export control restrictions?
<input type="checkbox"/>	Effort: Who is updating salary distribution?
<input type="checkbox"/>	Cost share/match
<input type="checkbox"/>	Travel (Review updated travel policies, double-check sponsor budget restrictions)
<input type="checkbox"/>	Purchasing (equipment: bid? sole source?)
<input type="checkbox"/>	Consultant/Prof Services: Statement of Work, data collection, travel reimbursement, start/end dates, other expenses
<input type="checkbox"/>	Subawards (budget, sub scope of work, schedule of reports, invoice process, allowability of costs), Review Sub recipient Monitoring Roles and Responsibilities Chart
<input type="checkbox"/>	Preaward expenses/Award setup displays: need to move expenses? Justifications?
<input type="checkbox"/>	Contract modifications: key personnel, subawards, rebudgeting, NCE, etc.?
○ Project Closeout	
Review:	
<input type="checkbox"/>	Monitor salary obligations, set up end dates in Payroll.
<input type="checkbox"/>	Make plans, if appropriate for personnel to be moved to a new project on which they will be working.
<input type="checkbox"/>	Purchases in the last 60 days of the project period should be reviewed closely for possible disallowances. <i>Purchases within the last 60 days of a grant period are a known risk indicator communicated by auditors. If an item must be purchased within 60 days from a project's end, it is recommended that the purchase be encumbered and the justification for the purchase explain the reason for the timing.</i>
<input type="checkbox"/>	Has PI confirmed all collaborators/subs have completed their work and invoiced the university within their timeframe?
<input type="checkbox"/>	Close down p-cards?
<input type="checkbox"/>	Close purchase orders, remove encumbrances.
<input type="checkbox"/>	Ensure all travel has been completed and reimbursed.
<input type="checkbox"/>	Work with PI to determine where capital equipment goes – Return? Request transfer of title?
<input type="checkbox"/>	Fund cost share requirements.
<input type="checkbox"/>	Work with Sponsored Program Administrator to close subawards.
<input type="checkbox"/>	Stop spending against project by the end date.
<input type="checkbox"/>	Submit the final financial report on time.
<input type="checkbox"/>	Submit technical reports on time.

By signing this document, the PI acknowledges that the checked items have been explained.

PI Signature _____ Date: _____