



New Award Set-up Checklist

Purpose: An aid for administrators at the start-up of a new award to: review the award information to ensure accuracy, discuss award set-up with the Principal Investigator, ensure all needed project accounts are established and expenses appropriately allocated and documented.

Review award notification received from ORA:

- _____ Read terms and conditions of award notice. Make note of any commitments/restrictions that will impact administrative and financial management of the award: effort commitments, budget restrictions, reporting requirements, etc.
- _____ Review award set up in Workday, notify ORA if any of the award data appears inaccurate
- _____ Review sponsor awarded budget
- _____ Review personnel commitments, ensure Key Personnel commitments are accurate as reflected in the award

Review the award with the Principal Investigator:

- _____ Highlight important award terms and conditions for the PI such as: effort commitments, publication restriction, reporting requirements, deadlines, etc.
- _____ Review awarded budget with the PI and update internal budget plan, as needed
- _____ Get PI confirmation of initial effort allocation for personnel assigned to the project
- _____ As applicable, work with the PI to finalize budget. If major re-budgeting is required, contact ORA Post Award.
- _____ If a subaward is included in the proposal, discuss the subrecipient monitoring plan
- _____ As applicable, work with the PI and other collaborating departments to allocate budget and confirm effort allotment for faculty/staff outside the home department

Establish Award in Workday

- _____ Complete Costing Allocations for personnel on the project. Make certain to use [Costing Allocation Template](#) for mid-period allocations
- _____ Contact other departments regarding the completion of Costing Allocations for personnel in their home departments
- _____ Establish standing purchase requisitions
- _____ If a subaward is involved, start the process to initiate the subaward
- _____ Start a department file/folder to ensure all records and supporting documentation are stored appropriately

**NOTE: During the life of the award, the award must be reconciled monthly, at a minimum. It is also important to schedule regular meetings with the Principal Investigator to review all transactions.*