



28TH ANNUAL NSPAA TECHNICAL ASSISTANCE WORKSHOP

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Principal Investigator (PI) Post- Award Briefing Checklist

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Congratulations on your award!

Beginning your project is an exciting time. This checklist is designed to alert you to many of the critical administrative actions that you will need to take along the way during implementation of your project. Keep in mind that all sponsored projects must be conducted in accordance with all relevant university and sponsor policies.





**AT THE START
OF THE
AWARD**

- Review your notice of grant award and any special terms and conditions of the award.
- Know your start date and your end date (the period within which you can incur expenses), as well as your Grant Index and Grant Accountant, assigned by Restricted Funds Accounting (RFA).
- Review reporting deadlines. You are responsible for the programmatic portion of the report. Financial reporting is done by RFA.
- If your project will need sub-awards, speaker agreements, consultant agreements, or other agreements, get in touch with the Contracts Specialist in ORA.
- Update annual Conflict of Interest and complete a Disclosure Form as needed. Update your financial conflict of interest form within 30 days if a new conflict arises during the course of the project period.



**AT THE
START OF
THE AWARD**

Work with your unit's Budget Officer for hiring new employees, students, and processing student stipends, tuition waivers, and your summer salary.

Meet with your unit's Budget Officer to assist you with obtaining a University Purchase (credit) Card if you don't have one, or linking your new award budget to your existing card.

If the project requires international travel, or non-US collaborator(s), be sure to contact the Office of Research Compliance to assess any Export Control concerns.

If the project involves human subjects, animal subjects research, etc., be sure to contact the Office of Research Compliance for guidance on procedures and training requirements.



**EVERY
ACADEMIC
PERIOD (*FALL,
SPRING, SUMMER*)**

- Complete effort reporting.** Effort reporting is a process mandated by the federal government to verify that direct labor charges to, or cost shared on, sponsored projects are accurate, timely, and reflect the actual level of work performed. Effort is the portion of time spent on a particular sponsored project, expressed as a percentage of the individual's total activity for the university.
- Certify your effort report by replying to the effort reporting data as instructed in the email.**



**EVERY
MONTH**

Review your expenditures to make sure all the charges are yours and that all charges are there. Consult with your Grant Accountant in RFA if you see any discrepancies between the report and what you think should be charged. If an expense needs to be transferred to a different account,

Ensure that all personnel are being paid from the account for the project on which they are working. Under no circumstances can work on one grant be charged to another.

Make sure consultants, participants and speakers are being paid according to when they are working. If you have sub-awardees, look for regular invoices and reach out to your collaborators if they are not invoicing you. Be sure to review invoices and work with your and Grant Accountant for guidance in getting them paid.



**90 DAYS PRIOR TO
THE PROJECT END
DATE**

Determine if you will need to request a **no cost extension** for your project and whether a not cost extension is permitted by your sponsor. Contact ORA for assistance with submitting the request.



Resources

- ❑ PI Handbook Vol 3 – Grant Related Processes
- ❑ e-Training Modules – Post Award Quick Guide
- ❑ ask.ora@morgan.edu

Thank you!



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