| | Category | Post-Award Checklist for New Grants |
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| | 1. LEO Notification | When LEO notification of award from ORSP is received, Greg Jolley will send e-mail to the PI to inquire who will be responsible for attending to the financial matters of the award. When PI responds Greg will send this checklist to the PI and the person assisting with managing grant expenses. |
| | 2. Departmental Contact Person | Please contact the appropriate person in your department/area named below to assist with managing the grant expenses. The PI and the departmental contact person should schedule time to meet with Greg Jolley and Audra Rose within 2 weeks of funding notification to review budget and any spending restrictions.<br>• Academic Affairs — Cheryl Riley<br>• Diabetes Center — Rebecca Andrews<br>• Biomedical Sciences — Jamie Remy<br>• Family Medicine — Michelle Bobo<br>• Geriatric Medicine — Debbie Meyer<br>• Pediatrics — Rebecca Andrews<br>• Social Medicine — Traci Winchell<br>• Specialty Medicine — Rebecca Andrews |
| | 3. Budget Management of Award | The grant budget is managed by both the PI and departmental support person to ensure appropriate spending and ensure that minimal funds are returned to sponsor.<br>• Budget management should include monthly balancing to ORACLE and ensuring all payroll is distributed accurately.<br>• Any communications (e.g., extensions, budget changes, etc.) from sponsor are to be shared with all appropriate offices (OU-COM Administrative & Financial Services & OU-COM Office of Research & Grants). |
| | 4. Contract Payroll | Grant PI or financial designee must notify Greg Jolley to make contract payroll transfers for any personnel to be paid on grant so that corrections can be made within 60 days of award notification. Please notify Greg of the name of the employee(s) involved, the dollar amount or percentage of total pay to be moved and the time period that the correction will cover. When first monthly payroll report is received you must review it to ensure that the correction was made and notify Greg if there is a problem. |
| | 5. WorkForce | For classified and/or student employees to be paid on the new grant, the supervisor(s) of each employee to be paid from the new grant must be notified of the change in accounting. The supervisor must make the change in the default account to charge in Workforce for student employees when the first applicable pay period under the new grant is entered into the pay system. Notify Greg Jolley to change the default account to be charged for classified employees. |
| | 6. Split Accounts | If a classified employee is going to have his/her pay split between accounts on-going then also notify Greg Jolley so that he can have the split percentage entered into Workforce as a default. |
| | 7. FMS Reports | For anyone other than the PI to receive reports for the new award notify Kelly Gorscak to have this set up in the ORACLE system. |
| | 9. Blanket Orders | If you have applicable blanket orders that should be charged to the new grant, please complete a change order to move the encumbrance to the new account. |
| | 10. Long Distance Code | If you have long distance calling cards that should be charged to the new grant, please contact someone in telephone operations at University Information Technology to have the card updated with the new account number. |
| | 11. Xerox Code | Please contact Greg Jolley to add a new or to change an existing account number for Xerox copying and/or printing within COM internal Xerox system. |
| | 12. Mail Codes Business Reply Envelopes | If you have old mail cards that you have used, particularly on a renewing grant, please destroy all old cards and begin using cards with the new account number on it. If you have business reply mail please contact Mail Services to update/change the account number to charge when they receive these mailings. |
| | 13. Facilities | If you use campus services such as Laboratory Animal Resources, University Vehicles, Facilities Maintenance, or Printing Resources for example, please make sure they are aware of your new account number the next time you use their services. They frequently use accounts on file or the last account number you gave them for a similar service and the charge is made incorrectly. |
| | 14. Post Award Services – ORSP | The university's Office of Research & Grants provides post award services. Please contact the appropriate individual below for assistance.<br>• Service Provider Agreements, Sub-Contracts: Jenny Whan 593-2859, whan@ohio.edu<br>• Research Incentive Information: Jenny Whan 593-2859, whan@ohio.edu<br>• All Other Post Award Questions: Audra Huddy 593-9986, huddya@ohio.edu |
| | 15. Assistance | If you have any questions please contact Greg Jolley at 3-2950 or jolley@ohio.edu. |