Category	Checklist for New Grant Post Awards
1. LEO Notification	When LEO notification of award from the Office of Research & Sponsored Programs (ORSP) is received, Greg Jolley will send an 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 responsible for monitoring the finances.
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 within 2 weeks of funding notification to review budget and any spending restrictions. • Academic Affairs — Christina McGuire • Diabetes/Endocrine Center — Suzanne Vazzano • Biomedical Sciences — Jamie Remy • Family Medicine — Michelle Bobo • Geriatric Medicine — Debbie Meyer • Pediatrics — Anita Yates • Social Medicine — Cheri Sheets • Specialty Medicine — Anita Yates
3. Budget Management of Award	The grant budget is managed by both PI and departmental support person to ensure appropriate spending and ensure that minimal funds are returned to sponsor. • Budget management should include monthly balancing to Oracle and ensuring all payroll is distributed accurately. • QuickBooks software and assistance with setup is available as a budget management tool (contact Jessica Wingett). • 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.
6. 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.
7. 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.
8. 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. Accounting Corrections Expense Transfers	If expenses occurring within the grant award period which are allowable under the grant guidelines have occurred prior to the set-up of the account, please complete accounting correction forms to move these expenses. Typically transfers must be completed within 60 days of posting to ORACLE if a p-card transaction, 60 days of the original transaction date for all other corrections. For new grant awards the corrections will typically be honored if completed within 60 days of the set-up of the account in ORACLE.
10. 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.
11. Long Distance Code	If you have long distance calling cards that should be charged to the new grant, please contact Wanda Dorr at CNS to have the card updated with the new account number.
12. Xerox Code	Please contact Greg Jolley to add new or change existing account number for Xerox copying and/or printing within COM internal Xerox system.
13. 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.
14. 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.
15. Post Award Services – ORSP	The university's Office of Research & Sponsored Programs (ORSP) provides post award services. Please contact the appropriate individual below for assistance. • Service Provider Agreements, Sub-Contracts: Jenny Whan 593-2859, whan@ohio.edu • Research Incentive Information: Jenny Whan 593-2859, whan@ohio.edu • All Other Post Award Questions: Patti Leib 593-2856, leib@ohio.edu
16. Assistance	If you have any questions please contact Greg Jolley at 3-2950 or jolley@ohio.edu.