

STEP 1: SETTING UP YOUR AWARD

- ☐ Inform Director Sponsored Programs and Research and Grant Accountant and Controller's office about the award. Share award notice.
- ☐ Request new FOAPAL to be created for Banner Account. [Click here](#) to request.
- ☐ If your award requires additional documents to be submitted to the sponsor please work with these offices to ensure that these are filled in a timely manner.
- ☐ If your award does not involve additional documents, request a time with the controller's office to setup the award.

STEP 2: Project Implementation

- ☐ Input actual expenses in the budget template (Post-Award expense tracker) for money spent through the award.
- ☐ Ensure that the budget is followed through and report any deviation that you may need to the Controller's office ASAP.
- ☐ If there is a sub-award, work with the sub-awardee institution to ensure project progress as proposed in the funded project.
- ☐ Please make sure that the award is acknowledged in all presentations, publications and conference posters appropriately.

STEP 3: Reporting

- ☐ Download the reporting time-line and set reminders once the award is setup.
- ☐ Download report template/guidelines and prepare the report to be reviewed by the Director of Sponsored Programs and Research and Grant Accountant eight business days prior to report due date.
- ☐ It is the Project Director's responsibility to ensure all sub-award material(s) for the report is collected and assembled to align with the Rider time-line.
- ☐ If you have excess carryover reach out to the controller office fifteen days prior to due date so this can be addressed effectively. Excess carryover for most sponsors is unspent funds that amount to more than 25% of budgeted amount. Check with your sponsor for their carryover policies.

☐ Ensure the report is formatted and all progress highlighted and budget verified before submission.

☐ If you plan to request NCE check on your sponsor's requirements. Reach out to Controller's office 90 days prior to project end date to process the NCE request.