**Post-Award Grant Orientation**

**Keep Records**

* The Office of Institutional Effectiveness (OIE) must keep grant proposals, award letters, reports, and compliance documents on file. To eliminate the need for multiple sets of records, OIE has created a central location for grant files on SharePoint. See Paige Krouse for a link for your files.
* These should include:
	+ 1 Solicitation
	+ 2 Proposal approvals (early notification and final approval)
	+ 3 Proposal (all submitted application materials)
	+ 4 Award or rejection (including budget & special conditions) 5 General correspondence with the funder
	+ 6 Reports
	+ 7 Budget revision correspondence (if applicable)
	+ 8 Grant period extension requests (if applicable)
	+ A Time and effort reports (if applicable)
	+ B Financial conflict of interest forms (if applicable)
	+ C Responsible conduct of research certifications (if applicable)
	+ D IRB or IACUC approval (if applicable)

**Stay in Compliance**

* Carefully read your award letter, grant contract/agreement, and all special conditions. Review them periodically throughout the project to ensure we’re meeting funder expectations and requirements.
* Award acceptance: All awards must be signed by an authorized institutional official. In most cases, this will be the Clair Knapp.

**Federal or passthrough grants**

* + Compensation: All employees receiving compensation from a federal grant should fill out a [Time & Effort Report](http://www.manchester.edu/about-manchester/institutional-effectiveness/grants-sponsored-programs/policies) at the end of each academic year and at the end of each summer. These should be on file in OIE.
	+ Conflicts of Interest: If you applied for a grant under PHS (probably NIH) or NSF, you should have filled out a [Financial Conflict of Interest](http://www.manchester.edu/about-manchester/institutional-effectiveness/grants-sponsored-programs/policies) form.
	+ Responsible Conduct of Research: Manchester requires a web-based training for individuals working on federally-funded research projects and additional training for individuals working on NIH-funded research projects. See Manchester’s [Research Misconduct and Responsible Conduct of Research Policies](https://www.manchester.edu/about-manchester/institutional-effectiveness/grants-sponsored-programs/policies) for more information.
	+ IRB: If you a conducting research using human subjects, you should have IRB approval on file in OIE.
	+ IACUC: If you a conducting research using animals, you should have IACUC approval on file in OIE.

**Report on Your Grant**

* Note your funder’s reporting expectations. If they are not clear, ask for clarification.
* Always submit your reports on time.
* Put final reports on SharePoint or email them to Paige Krouse after submission.

**Communicate with Your Funder**

* Is your spending on track or will you need an extension? Make sure to contact your funder early to request extended time to spend your grant.
* Is the project going as planned? Have your goals or resources changed? Make sure to keep in touch with your funder about potential changes to your budget or if the scope of your project needs to change.

**Spend Your Grant**

**What am I allowed to charge to a grant?**

* MU Requirements (see the “Stay in Compliance” section above for more information):
	+ Allowable costs: See MU’s [Reimbursement and Allowable Expenses Policy](https://chetnet.manchester.edu/dept/budget/SitePages/Home.aspx) .
	+ Direct costs: See MU’s Policy Statement on [Direct vs. Indirect Costs](http://www.manchester.edu/about-manchester/institutional-effectiveness/grants-sponsored-programs/policies)
	+ Payments to employees: See MU’s [Compensation Policy](http://www.manchester.edu/about-manchester/institutional-effectiveness/grants-sponsored-programs/policies)
	+ Participant support costs: See MU’s Participant Support Costs guidance.
* Federal Requirements:
	+ If you are spending federal funds, all expenses must be allowable, allocable, consistent, and reasonable. See this list of [allowable and unallowable costs on federal awards](http://www.manchester.edu/about-manchester/institutional-effectiveness/grants-sponsored-programs/policies) for more information
	+ To find federal rates for meals, airfare, hotels, etc…by location, visit www.gsa.gov.
* Funder Requirements: You can charge the items and amounts your funder approved in your award documents.
* *Expenses within the grant period. All funds MUST be spent by the last day of the grant period unless you are granted an extension.*

**How do I charge an expense to a grant?**

* Payments to employees: [Employee Status Change Form](https://gateway.manchester.edu/depts/dept-hr/HR%20Campus%20Documents/Employee%20Status%20Change%20Form.pdf) (as supplemental compensation)

*Return to HR*

* Payments to students:
	+ Student Worker: Start with an HR Yellow Card (located in the HR Office)
	+ Research Assistant or Intern: Start with an HR Blue Card (located in the HR Office)
* Travel: [Travel Expense Report](https://chetnet.manchester.edu/dept/budget/SitePages/Home.aspx)

*Return to Business Office*

* Supplies: [Check Request Form](https://chetnet.manchester.edu/dept/budget/SitePages/Home.aspx)
* Equipment/software over $2,500: [Purchase Order Requisition](https://chetnet.manchester.edu/dept/budget/SitePages/Home.aspx)
* Consulting/contract services: [Check Request Form](https://chetnet.manchester.edu/dept/budget/SitePages/Home.aspx)

**Who signs my forms?**

* Non-federal grant: If you are the project director/principal investigator on a grant, you can approve your own expenses, except reimbursements, payments to people, or large requests. When your expenses need approved, this should be done by the person who regularly approves your other expenses, such as your direct supervisor, your department chair, or your dean (if you are the chair of your department). This person should have received a copy of your budget from the Office of Institutional Effectiveness. If you are a collaborator on a grant, the project director/principal investigator should approve your expenses.
* Federal grant: A dean should approve all expenses. If you are a dean, this will be covered by your normal p-card review.