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| --- | --- |
| ***Date:*** |  |
| ***PI/Co-PIs:***  |  |
| ***Funder/Program:*** |  |
| ***Project Title:***  |  |
| ***Award Date:***  |  |
| ***Award/Subaward Number:***  |  |
| ***Project Period*** |  |
| ***Award Amount*** |  |
| ***iFOAPAL #:***  |  |
| ***Prime Institution (if other than F&M):*** |  |
| ***Subrecipient Institution (if applicable):*** |  |
| ***Attendees:***  |  |
| ***Topic*** | ***Reviewed*** | ***Comments*** |
| ***Federal/Other Funding Agency Requirements*** |  |  |
| 1. *Review award* ***terms and conditions*** *with PI/PIs, including* ***performance and financial reporting*** *requirements, and* ***compliance issues and requirements****. Review rebudgeting requirements for situations when the proposed budget amount differs from the award amount.*
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| 1. *As applicable, point PI/Co-PI to funder* ***award management******guidelines****.*
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| 1. *Review funder’s policy on* ***pre-award costs***
 |  |  |
| 1. *Review* ***travel rates*** *and, if* ***international travel*** *is included in a federal award, review**the* ***Fly America Act*** *requirements.*
 |  | Federal travelers are required by 49 U.S.C. 40118, commonly referred to as the "Fly America Act," to use U.S. air carrier service for all air travel and cargo transportation services funded by the U.S. government.  One exception to this requirement is transportation provided under a bilateral or multilateral air transport agreement, to which the U.S. government and the government of a foreign country are parties, and which the Department of Transportation has determined meets the requirements of the Fly America Act. URL: <http://www.gsa.gov/portal/content/103191> |
| 1. *Review funder* ***reporting and/or deliverables*** *requirements per the proposed timeline.*
 |  |  |
| 1. *Review funder and institutional requirements for* ***rebudgeting.***
 |  |  |
| ***Topic*** | ***Reviewed*** | ***Comments*** |
| 1. *Review funder requirements for requesting* ***no cost extensions.***
 |  |  |
| 1. *Review institutional* ***academic policies***
 |  | Refer to academic policies at <http://www.fandm.edu/college-policies/academic>. |
| 1. *As necessary, review* ***use of funder electronic grants management portals****, such as eRA Commons, NSF Fastlane, Research.gov (NSF reporting), Pubmed (NIH publications).*
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| 1. ***Applicable for NIH award recipients****: The NIH Public Access Policy implements Division F Section 217 of PL 111-8 (Omnibus Appropriations Act, 2009).  The law states:*The Director of the National Institutes of Health ("NIH") shall require in the current fiscal year and thereafter that all investigators funded by the NIH submit or have submitted for them to the National Library of Medicine's PubMed Central an electronic version of their final, peer-reviewed manuscripts upon acceptance for publication, to be made publicly available no later than 12 months after the official date of publication: Provided, that the NIH shall implement the public access policy in a manner consistent with copyright law.
 |  |  |
| 1. ***Applicable for NSF award recipients:***
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| * 1. *Use the following accounting codes for any expenditures related to* ***“Participant Support Costs” (if applicable)****: 7288 -Travel; 7298 - Subsistence; 7327 - Stipends*
 |  |  |
| * 1. ***RCR training is required for all students receiving compensation (or working as volunteers) or receiving academic credit for participating in NSF-funded research****. RCR training will be documented on a form developed for that purpose, signed by both the PI and the student.*
 |  | *This RCR form will be maintained by the Office of the Associate Dean of Faculty (Research). RCR training will include the following components: a) each student must successfully complete the appropriate CITI\* module of RCR training (log on to* [*www.citiprogram.org*](http://www.citiprogram.org) *and sign in as an F&M user). Successful completion will be documented by attaching to the RCR form a certificate generated by the online training program. b) PIs will certify on the RCR form whether the student has received any additional RCR training appropriate to the research and discipline.*See Research Integrity Policy at <http://www.fandm.edu/college-policies/academic>. |
| 1. *If applicable, review requirements for PI to* ***monitor activity on any subawards*** *relative to proposed effort and timeline, and to receive* ***annual reports*** *from subawardee*.
 |  |  |
| ***Topic*** | ***Reviewed*** | ***Comments*** |
| ***Institutional Procedures/Requirements*** |  |  |
| 1. *If the PI holds* ***multiple awards****, review institutional and funder requirements to* ***separate expenditures charged to each award****, based on each award’s proposed or most recent approved budget and activities.*
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| 1. *Suggest PI use an Excel spreadsheet for* ***shadow accounting*** *of award.*
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| 1. *Review* [***allowable and unallowable***](http://www.fandm.edu/business-office/grant-funding) *costs and* [*purchasing requirements*](http://www.fandm.edu/business-office/grant-funding) *for using federal funds.*
 |  | Refer to Grant Funding Guidelines and Procedures at <http://www.fandm.edu/business-office/grant-funding>. |
| 1. *Review institutional procedures for* ***requisitions****.*
 |  |  |
| 1. *Review institutional procedures for* [***reimbursement***](http://www.fandm.edu/college-policies/financial-affairs/business-expense-reimbursement-policy) *of expenditures.*
* *Note: Reimbursement form* ***MUST*** *be approved by department chair in addition to requestor*
 |  |  |
| 1. *Business Office forms are available at* [*http://www.fandm.edu/business-office/forms-bank*](http://www.fandm.edu/business-office/forms-bank)
* *Travel Expense Reimbursement Form*
* *Missing Receipt Form*
* *Mileage Reimbursement Form*
* *Disbursement Voucher*
 |  |  |
| 1. *Review institutional requirements for* ***employing personnel*** *on the award, including students. For non-student employees, includes recruitment and vetting of candidates, and annual employee performance review requirements.*
 |  |  |
| 1. *Review institutional requirements to* ***document PI*** *or* ***Co-PI time/percent-of-effort*** *expended on the award, and frequency of documentation requirements.*
 |  |  |
| 1. *If your budget includes a* ***subaward or contract*** *then a requisition/purchase order should be created to reserve the funds using account code* ***7328****.*
 |  |  |
| 1. *Review institutional and funder requirements to* ***document any match*** *offered at the proposal stage by the institution or by any project partners.*
 |  |  |
| 1. ***Review/train*** *PI/Co-PI’s* ***in use of Banner****, how to run* ***budget queries*** *and* ***Cognos reports****, and how to use other institutional tools/software.*
 |  |   |
| 1. *F&M* ***point(s)-of-contact****, for various grant management activities:*

***Molly Dellinger, Grants Management Coordinator, ext. 4517, for:***1. *Rebudgeting/reallocation (along with Andrea Sherman)*
2. *No cost extensions*
3. *Setting up user accounts in eRA Commons, NSF, and other agency portals*
4. *Subaward contracts*
5. *Annual/Final/Other Reports*
6. *Summer/Academic Year Salary Requests*

***Andrea Sherman, Senior Accounting Analyst, ext. 4220, for:***1. *Budget changes via a transfer*
2. *Journal voucher requests*
3. *Grant accounting/billing information*
4. *Final financial reporting*
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