**Grant Award Start Package**

Hello Principal Investigator!

On behalf of the Grants Management Office (GMO) and the Office of Sponsored Projects (OSP), congratulations on your recent sponsored award! The research and work that you do across your grants at Long Island University is critical to furthering our growth as a nationally recognized academic and research institution.

There are several documents and processes we’d like you to know about to help make your time performing administrative tasks for your grant as efficient as possible, so that you can focus more on the tasks that really matter: research and programmatic outcomes. Some of these may not be relevant to this particular project but we thought it prudent to include everything you may need to know for any future projects.

The following is the LIU financial chart string for Year 1 of your grant: ###### ## ###### #####

* 5 digits - Fund # - Specific to this grant/LIU’s primary tracking number
	+ Each year the grant (if renewed) will receive a new fund number to ensure proper cut-off and allocation of expenses for reporting purposes
* 2 digits - Operating Unit – Your Operating Unit
* 6 digits - Department- Your Budget Department
* 5 digits - Account- Please see Budget Form filled out by OSP and GMO

You will need this number to charge expenses on your grant. Procedures and forms to charge against your grant are highlighted below and will be explained in more detail with an in-person meeting with OSP and GMO. We encourage you to be familiar and initiate these items timely to prevent issues:

1. If you are planning on budgeted travel, as soon as the known event is identified, complete the **Travel Approval Form** – include supporting backup for the travel including where the travel is explicitly stated in the grant award, registration flyers, screen shots of travel costs, and if flights are involved, that the Fly American Act is followed (Federal Grants)
	1. This should be started as soon as travel is identified (and at least one month in advance of the trip) so the appropriate approvals can be obtained.
2. For planned expenditures on physical goods and services, University policy requires they be procured through requisition/purchase orders on eProcurement; use the **ePro Guides** to make orders, and ensure the orders generally only use the accounts included in the Budget Detail provided by GMO/OSP. Note: Using accounts other than those listed on your budget detail is allowable but may cause confusion when you are trying to determine the amount of available funds. We can go over this in more detail when we meet to discuss your grant.
	1. If you are currently not an ePro user, please reach out to the Procurement Department to be set up by completing the **LIU-Purchasing PeopleSoft Buy Registration** form.
	2. For Amazon purchases, use the **Amazon ePro Ordering Process Guide**
	3. If you are using an Independent Contractor, for amounts under $5,000 you must submit the **Independent Contractor/Substitute W9** form and an Invoice in the ePro system. For amounts of $5,000 and above work with OSP / GMO to create a contract and encumber/reserve the entire amount in the Purchasing system
	4. If there is a Sub-award to another institution for work being contracted out, work with OSP / GMO to create a contract and encumber/reserve the entire sub-award amount in the Purchasing system
3. Payments to non-employees participating in research, testing, and surveys require pre-approval in accordance with University policy and must be submitted with valid supporting documentation via the **Research Participant Payment Request Form**. The University will not process requests for these services through any unapproved mechanisms other than this University-approved Form.
	1. Note, electronic signature by the P.I. is the preferred method so that we can ensure the P.I. has seen the expense – signatures are often unreadable – so long as the form is then emailed to OSP from an authorized LIU email account which ensures the electronic signature came from the actual signer/designee
4. For employee travel and business-related expense reimbursements, use the **Travel & Expense Reimbursement** form which should also be signed off by the supervising P.I.
	1. Supporting documents (Google Maps mileage or receipts) should be included.
	2. When purchasing from vendors or service providers, since LIU is a not for profit, we are exempt from taxes (many grants also do not permit coverage of taxes), therefore provide to the provider the **LIU W-9** and/or **LIU Tax Exempt Form**
	3. The GMO reviews all expenses for allowable costs per grant terms within budget.
5. If a position is being requested, someone is needing to be hired, please complete the [HR Portal](https://jobs.liu.edu/admin.html#/login/) application and include within the application the grant fund number that was provided above
	1. Additionally, please work with the GMO on the front end to get all student labor, part-time, hourly, and full-time staff hired so that they can be activated and paid timely for their work prior to the work being performed
	2. If you are paying yourself or another faculty member Academic Year release time, an **HR Action Form** must be completed and submitted. The contract date should always be the current period of the grant award, as each year the grant (if renewed) will receive a new fund number. The Salary should be the amount of salary being paid from the grant.
	3. If a graduate student will be working under the grant – receiving a stipend and tuition award (if part of the awarded budget) – please fill out the **Graduate Assistantship Award Application** electronically with P.I. sign-off and submit to GMO/Academic Budgets along with any supporting documents. If student workers are not receiving tuition then they should be hired as an hourly employee through the [HR Portal](https://jobs.liu.edu/admin.html#/login/).
	4. If you or any other employee will be receiving a one-time or one semester stipend, initiate the additive pay process at least 60 days before the anticipated work is performed by completing a stipend request in the [HR Portal](https://jobs.liu.edu/admin.html#/login/). A written job description and a salary justification must accompany your request so that the amount can be paid at the completion of the work.

The Zip Folder attached includes all of the referenced grant documents [**underlined in green text**]. Please utilize electronic fillable documents whenever possible. Since all documents will be stored digitally, this will be extremely helpful.

If any specific questions arise, please reach out to someone in the GMO or OSP for assistance. As indicated above, if you would like we are happy to set up a meeting with you to go over all of the information and forms in this email. If you’d like to set up a time to chat please email me with at least three dates/times of your availability.

Thanks again for the hard work and dedicated service to research and Long Island University.

We look forward to working with you!

The Grants Management Office & The Office of Sponsored Projects