**Prior to account setup**:

If appropriate, submit IRB, IACUC, IBC compliance protocols to the appropriate committee(s). Approval can take 4-6 weeks.

Complete Export Control, FCOI, and RCR processes (some sponsors do not require FCOI and RCR).

Upon receipt, respond to your award notice email from OSP Post Award. This requires the PI to review the agreement and notations from Post Award, and respond with the requested information, as well as any questions or concerns, and ultimately PI certification indicating award acceptance.

Also check for:

Starting and ending dates to match your expectations (or proposal dates);

An understanding of the noted terms and restrictions;

Ability to meet all required deliverables, reports, and milestones noted in the agreement and scope of work.

Budget in the agreement is accurate.

Plan for equipment purchases and familiarize yourself with UI Purchasing Services processes.

Discuss hiring and personnel appointment with your departmental grant administrator.

**When you receive your account setup emails from OSP Post Award** **and OSP Financial Unit**:

Review the Award Face sheet to ensure:

Budget is allocated as awarded;

Accuracy of subaward information.

**Work with your assigned Departmental Grants Administrator (DGA) to**:

Begin hiring processes and personnel effort assignment/appointment.

Discuss, plan, and initiate project expenditures.

Discuss, plan, and initiate travel processes.

Plan for and initiate subawards and services agreements.

**During the project**:

Track (and report) cost share with your department.

Plan for your deliverables, reporting dates, and any required travel, publications, etc.

Review your monthly financial reports from OSP (10th of each month).

Plan for project changes and seek OSP assistance with sponsor prior approval. Seeking approval after the fact will often result in disallowance.

Submit the required personnel activity reports (PARS) and ensure that your project employees understand the importance of timely PAR submission.

Route all requests from the sponsor for non-technical information to OSP. This includes amendments, budget information, etc.

**Nearing the last 90-120 days of the project and up to the final closeout date:**

Prepare for closeout by coordinating with your departmental grants administrator (DGA), the OSP Financial Unit, and the Office of Technology Transfer.

Ensure accurate posting of all expenditures.

Submit final report as directed in the sponsored agreement, as well as any information to OSP as required in the agreement (property information, patent information (via OTT), etc.).

**For additional details on each process, please see the full ‘Best Practices for Account Setup’ document posted at** [**http://www.uidaho.edu/research/faculty/resources/forms**](http://www.uidaho.edu/research/faculty/resources/forms) **or available from** [**Post Award**](mailto:postaward@uidaho.edu)**.**