

## Sponsored Project Checklist

This checklist is designed to help you stay on top of administrative tasks as you move forward with your project at LMU. Please remember that all grants must be carried out in compliance with both university and federal policies if applicable.

Start of Award	
X	Review the Notice of Award. Get the award reviewed by ORSP, approved/signed, and routed in Cayuse SP. All records of awards, including amendments, will be in Cayuse SP for the PI to access.
	Post Award Accounting will coordinate an award meeting to set up the award in Workday and go over financial reporting deadlines, payments, and invoicing.
	Purchase equipment, computers, supplies etc. as soon as your grant account is set up.
	Work with HR to hire personnel or Student Employment Services to hire students.
	Work with ORSP if you need any subawards as a part of your project.
	If you are working with international collaborators (consultants, subs, contractors, guest speakers, honorariums etc.) Please reach out to Accounts Payable.
	Set-up consultants, independent contractors, external evaluators, and any other paid collaborators in Workday as Suppliers for invoicing.
	Update the Financial Conflict of Interest Form if anything has changed since the time of proposal and then annually afterward.
	For NIH grants, <a href="#">Financial Conflict of Interest Training</a>
	For NSF grants, <a href="#">Responsible and Ethical Conduct Research Training</a>
	For NSF grants, <a href="#">Safe and Harassment-Free Working Environment</a> plan, as applicable for off-site off campus research projects
	<a href="#">IRB</a> or <a href="#">IACUC</a> approvals by LMU committees (if applicable)
Monthly	
	Review your expenditures to make sure all the charges are corrected and charged to the grant account in Workday. Consult with PAAA if you see any discrepancies.
	Determine if there is a need to re-budget.
	Ensure that all personnel are being paid from the grant account for the project on which they are working.
	If you have subawardees, check Workday for regular payments and reach out to your collaborator if they are not invoicing you. Be sure to review invoices and work with PAAA for guidance in getting them paid.
Every Year	
	Work PAAA to authorize PI salary (summer salary, cost share, academic year course release) on an annual basis. It is important that you inform PAAA of effort commitments on all grant projects to ensure the salary is properly charged in a timely fashion. Effective for the coming academic year (2025-26), fall course

	releases will be recorded in October and spring course releases will be recorded in February.
	Coordinate with PAAA and HR to complete effort reporting. This federally mandated process ensures that all direct labor charges to, or cost-shared on, sponsored projects are accurate, timely, and reflective of the actual work performed. Effort is defined as the percentage of an individual's total university activity dedicated to a specific project or task.
	Update the Conflict of Interest sent by the Audit office and prepare a FCOI disclosure Form if there are any changes.
	Review and submit your reporting requirements and make sure they are met.
	For NSF grants, update and certify Current and Pending support information. Required for each year of the project.
<b>As Needed</b>	
	Share changes and obstacles (scientific or financial) with PAAA as they arise.
	Make sure consultants, participants and speakers are paid according to when they are working.
	If the project requires travel, please read <a href="#">LMU's Travel policies</a> . If the travel will be international, be sure to <a href="#">complete the International Travel Registry</a> and disclose with the compliance coordinator for any further guidance.
	Disclose inventions, discoveries, and improvements to the Associate Provost promptly by completing the <a href="#">Invention Disclosure Form</a> .
<b>90 Days Prior to Project End Date</b>	
	Work with PAAA to determine if you will need to request a no-cost extension (NCE) for the remaining balance of the project. Work with ORSP to coordinate the NCE request to the sponsor.