

Post-Award

7471

C&G Tasks for 7471

- Initiate form - based on PAN, new budget year, new subaccount, redistribute budget
 - 7471 form (include description of allocation in Comment section)
 - PAC/PAN
 - Internal budget spreadsheet
- Obtain PI Signature
- Obtain Administrative Signature – (Dept mgr.) separation of duties
- Send to Financial Operations

Monthly reconciling/distribution

C & G Tasks for Monthly reconciling/distribution of financial reports

- Monitor project and resolve any discrepancies (i.e. payroll, A21, charge errors)
- Meet with PI and/or Dept Manager as needed/requested. One on One alert when we see a potential area(s) of concern
- During a heavy grant cycle, notify via email, Department Managers & PI if reports will be late. Provide an expected date of when they will be distributed.

A21 charges

C & G tasks for A21 charges

- Review charges with PI to verify if charges need to be transferred, re-budgeted, or re-accounted
- Complete Fin Ops worksheet and return for processing

Closeouts

C & G Tasks for Closeouts

- Work with PI/Admin to coordinate all items on checklist
- Complete memo to transfer O/D (if applicable) with PI
- Verify with Fin Ops grant has been inactivated