AG Award Received (Checklist)

All of these procedures start when a Grant Award is received by your office.

Questions please see CGO

1. Review PADR for any inconsistencies (Bud Rule, Budget, etc.) 
   1. Does the budget and PADR match this would include cost share sheet?
   2. Start and End Date, correct?
   3. Are all the Co-I’s listed, correct?
2. Business Officer should schedule a New Award Meeting with PI (include Business office Analysts) once PADR 1 comes in. 
   1. Walk PI through the Post Award Process and Next Steps
      1. PADR walk through.
      2. IRB OR IACUA (if applicable) – Required to start Human Subjects or Animals
      3. Subawards (if applicable)
      4. Payroll
      5. Budget Review/Changes – (CAS, Travel, equipment over $5K, etc.)
      6. Other Questions
3. Update Personnel of receipt of established account 
   1. Email all outside department/College grant and business admin contacts to have their personnel charged to the grant in receipt of established account. If Cost Share is required, you must request a cost center (101XXXXXX) account from the outside department/College so you can JV cost share cost back to the that department.
   2. Check the clearing account monthly to see if it needs to be updated with grant account numbers.
4. Check Grant for potential: Subawards, Consultants, Independent Contractor, Declining Procard/Loadable Cards (Western Union), cost share/matching requirements. 
   1. Subawards - <https://www.research.uky.edu/office-sponsored-projects-administration/outgoing-subawards>
      1. PI has all documentation received at proposal stage
      2. PI should complete the online sub process at this link <https://ris.uky.edu/ospa/subagreement/>. Once it is ready send the PI an email to approve the request so that it will go to OSPA
   2. Consultants/Contractors
      1. Make sure thresholds are appropriate (i.e. 5K-40k bid process, sole source, etc.)
      2. Guide PI on Independent Contractor Form
   3. Declining Procard - *Declining Procards* [BMP E-9-1](https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/bpm/E-9.pdf)

## Forms and Information

* [Procedures to Obtain a Procurement Card](https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/procardprocedures.pdf) (PDF)
* [Procard Application](https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/eforms/procardapp.pdf)(PDF)
* [Declining Balance Card Supplement Information](https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/Declining%20Balance%20Card%20Supplement%20Information.pdf) (PDF)
  + 1. Complete the Declining Balance Card Supplement form and Procard Application
    2. Once the paperwork is completed then
       1. Signed by PI
       2. Signed by Supervisor of PI
       3. Signed by CAFE
    3. iii. Once signed email UK CAFE Business Analysts at [cafeanalysts@uky.edu](mailto:cafeanalysts@uky.edu) to send in for processing to Accounts Payable.
    4. [Western Union Loadable Card Program](https://luky-my.sharepoint.com/:f:/r/personal/crhens2_uky_edu/Documents/Western%20Union%20Loadable%20Card%20Program?csf=1&web=1&e=IdhBdp)
  1. Cost Share/Matching Requirements [Cost Sharing/Grant Matching](https://www.research.uky.edu/office-sponsored-projects-administration/cost-sharinggrant-matching) guidelines
* Ensure Business office accounts for these items [BPM](https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/bpm/E-50-2.pdf) [E-50-2: Cost Sharing](https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/bpm/E-50-2.pdf) 
  + - 1. If Cost share/Match is from another grant account scopes will need to be established and it should be listed on the PADR on the cost share form by the RA/OSPA
      2. If Cost Share is required Business Officer or assigned staff must request a cost center (101XXXXXX) account from the outside department/College, then provide to be used to JV the expenses each month. (See 3.A for when this would normally occur)