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 to send in for processing to Accounts Payable.
		4. [Western Union Loadable Card Program](https://luky-my.sharepoint.com/%3Af%3A/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) [ ]