

# New Award: Postaward Checklist



Task Name	Due Date	Done	Assigned To	Status	Comments
1. Once the award is received, carefully review the notice of award terms. If cuts were made to the budget, work with the PI to revise this to fall within the awarded amount.		<input type="checkbox"/>			
2. If the award is federally funded, email key personnel to update PHS/FITS (grant relatedness status, SF1346v1- once per FY, and FCOI training- every 3 years). Please also be sure to certify the investigator maintenance tab. Note the award cannot be set up until all key personnel have updated this.		<input type="checkbox"/>			
3. If a new CREF needs to be created, go to the CRIS website and at the bottom of the page and select CREF request. <a href="https://www.med.upenn.edu/cris/">https://www.med.upenn.edu/cris/</a>		<input type="checkbox"/>			
4. If ORS has not set up the S fund, email msaward@lists.upenn.edu a copy of the NDA. This is if the award has not been set up within 7 business days.		<input type="checkbox"/>			
5. Once the S fund is set up, please review AIS for accuracy and PHS/PRBU. If you notice mistakes, email as-prob@lists.upenn.edu to correct any mistakes. (project period dates, org/org/orig/ correction, amounts, etc.)		<input type="checkbox"/>			
6. Add the new account number to the CRRWH Account Smartsheet.		<input type="checkbox"/>			
7. If there are subaccounts on the project, complete the subaccount worksheet and email as-prob@lists.upenn.edu for processing.		<input type="checkbox"/>			
8. Review the budget and complete the budget journal entry spreadsheet.		<input type="checkbox"/>			
9. If there are subaccounts on the project, reach out to the other department to complete a budget journal entry.		<input type="checkbox"/>			
10. If this must be invoiced upon the execution, please be sure the invoice is sent.		<input type="checkbox"/>			
11. Verify with the PI that work has started and update payroll accordingly once discussed with the PI.		<input type="checkbox"/>			
12. Email the PI to confirm what cores should be activated and for which lab members. Then verify that the individuals that are being allocated to that project and inform the grants coordinator to add the access for each.		<input type="checkbox"/>			
13. If a subaward is listed on the project, enter this into RIS. (See Subaward Smartsheet for further guidance)		<input type="checkbox"/>			
14. Once the subaward is executed, set up the PO for the subaward site and email it to them.		<input type="checkbox"/>			
15. If animals are involved in the project, activate the protocol in Polaris.		<input type="checkbox"/>			
16. If human subjects are involved, approve the RSN once the study coordinator has set up the study in the Research Billing Application. This will also need to be added in CAMS.		<input type="checkbox"/>			
17. Notify the grants coordinator to add the account into CONCUR for reimbursements.		<input type="checkbox"/>			
18. Make note of any progress report requirements and invoicing schedule/milestones dates.		<input type="checkbox"/>			
19. Add the future progress report and financial report due dates to the preaward smartsheet.		<input type="checkbox"/>			
20. Add new award into FEEDS and update the Other Support Tool for PI		<input type="checkbox"/>			