

WSU OSP Post Award Process Document
Twenty Things that Happen for Principal Investigators
June 1, 2005

Once an award is received by Weber State University, the following steps and processes are followed:

1. Funding Agency notifies OSP.
2. OSP notifies the Principal Investigator (PI).
3. OSP and the PI meet to review the Principal Investigator's Handbook.
4. PI signs document acknowledging receipt of PI Handbook.
5. PI signs Drug-free Workplace form.
6. PI signs the Vacation Carry-forward Policy Form
7. PI signs Extra-Compensation form if required.
8. If the award has a match requirement, the match documentation must be in place. Your Sponsored Project Administrator will assist in the process of setting up the mechanism. As the project moves along, the OSP Contract Analyst will help monitor the match account to be certain match is spend according to the contract.
9. OSP creates a brown contract file and a buck sheet showing how the budget should be entered into the Banner Accounting System. The PI receives a copy of the buck sheet.
10. If salaries or wages are to be paid from the contract, the PI must originate the PAR. In order to do this, it is required that the PI attend PAR training which can be scheduled on Training Tracker. OSP will facilitate this if needed.
11. PI purchases according to the budget.
 - a. Any purchases under \$1000 can be made with the department P-Card, then reallocated to the contract when the P-Card statement comes.
 - b. Any purchases over \$1000 must be made with an online requisition. The PI must attend Banner Requisition Training which can be scheduled on Training Tracker.
 - c. WSU considers equipment as anything over \$1000. This must be bid through the Purchasing Office.
 - d. Consultants can only be hired through the Purchasing Office.
12. If the budget provides for travel, the PI can use the Department P-Card and then reallocate the cost to the contract. However, if there is a substantial amount of travel, it may be necessary to activate a Travel-Only P-Card.
13. OSP will send a monthly summary of budget, expenditures, obligations, and balance available. The PI must monitor the expenditures to ensure that all the money is spent according to the budget. During the course of the contract, it may be necessary to rebudget. This often requires permission from the granting agency. The Sponsored Project Administrator will help here. Small amounts (less than 10% of a given category) can be moved internally without permission with the OPAS Form.

14. The controller's office will send forms verifying that time on the contract was in fact dedicated. The PI or the supervisor must sign these forms and return to the Controller's Office.
15. If any changes in the Scope of Work or the financial details are needed, this must be done with an amendment to the contract. The Sponsored Project Administrator will assist in this process.
16. Your contract document will articulate the technical reporting requirements. You will receive email reminders from OSP to help you remember the dates when reports are due. You should send the report to OSP for transmission. OSP will provide a cover letter and place a copy of the report in your contract file so that auditors can readily see that the requirement was met.
17. The contract document will articulate the financial reporting documents. Financial reports can only be constructed with the assistance of accounting. Any numbers on a financial report must match the numbers on Banner.
18. Contracts require final reports. Failure to submit a final report can jeopardize future funding and cause liability for the university. The PI must complete the final report.
19. A final reconciliation of the money must be accomplished. This is done with the assistance of WSU Accounting and OSP.
20. Any equipment bought with the contract money must be inventoried and vested with the appropriate agency.