

The process begins upon official notification that the proposal will be funded. The [PreGCA](#) receives the Award Notification and Award Letter and begins the preparation of the Activation Package. The Activation Package is the first step in setting up the grant fund. First, the [PreGCA](#) generates an Activation Memo (AM) and Activation Package Checklist (APC) and sends to the Principal Investigator/Fiscal Officer (PI/FO) and [PostGCA](#). [PreGCA](#) schedules an orientation with PI/FO and [PostGCA](#).

[PostGCA](#): Receives the AM and APC and reviews the proposal and Award Notification and prepares the compliance worksheet for meeting with the PI/FO.

PI/FO: Receives the AM and APC and prepares for the orientation. PI/FO must bring budget, PCNs, approval for release time and authorization for overrides.

Activation Orientation: The [PreGCA](#) and [PostGCA](#) meet with PI/FO, other faculty involved in the project and staff. Following the checklist various expectations will be discussed and documentation either captured or verified. This is a checkpoint for making sure that files are complete prior to the actual activation of the grant fund. This is a critical step and must be rigorously followed. **ALL FORMS MUST BE COMPLETED ELECTRONICALLY!!!!**

Certification of Activation Package Checklist by AVP: [AVP](#) receives the checklist with signatures from the [PreGCA](#) and the [PostGCA](#). [AVP](#) reviews and ensures that the information and documentation is complete, correct and current.

Activation of the Grant Fund Account: Following certification by the [AVP](#), the Activation Package with Budget Summary, Detailed Grant/Contract Personnel Services Budget and Indirect Costs Worksheet prepared and signed by the [PreGCA](#) is sent to the Grants Accounting Group.

Grants Accounting Group (GAG) review the documentation and validates that the information and calculations for budget, fringe benefits, indirect costs are correct. GAG also ensures that the calculations for indirect costs are correctly set up in Banner. GAG signs documentation and sends to GAG.

Grants Accounting Group (GAG) reviews the documentation and validates that the information and calculations for budget, fringe benefits, indirect costs are correct. GAG also signs the Activation Package with Budget Summary, Detailed Grant/Contract Personnel Services Budget and Indirect Costs Worksheet. GAG prepares the FRAGRNT. GAG validates the fringe benefits and ensures that they are correctly applied with respect to position title. GAG signs documentation and sends to Finance.

Grants Accounting Group (GAG) receives the Activation Packet from GAG and verifies that the grant fund is active and enters the budget (Budget Summary) into Banner

Finance: The Assistant to the Director receives the Activation Packet from GAG and ensures that the grant fund is attached to the accounting system.

The [PreGCA](#) and [PostGCA](#) are notified that the Grant Fund for this project is active. [PostGCA](#) sends memorandum to PI/FO notifying them of the grant fund activation and outlining the deadlines for reports and three (3) month close-out and the Subrecipient Monitoring procedure (if applicable). Copy of the memorandum is sent to [PreGCA](#), [AVP](#), and GAG. [PostGCA](#) works with Administrative Assistant to ensure that the deadlines are inputted into OGRA's operational calendar and all documentation is scanned and filed on the Sponsored Program shared drive.

It is important that the PI/FO be aware of the federal and state compliance issues that are in a constant state of flux. The role of mandatory orientation is to insure that everyone responsible for the administration and management of grant dollars is aware of current requirements of regulatory guidelines. For this reason, grant funds will not be activated until the PI/FO and all relevant personnel attend the Grant Activation Orientation and sign/initial required documents where appropriate.

Pre-Grants: Activation of the Grant Fund Procedure:

This protocol is extremely important since it allows various levels of oversight that flows through the program and the accounting side of Sponsored Programs. This allows OGRA to ensure that all of the documentation is accurate and complete. The process begins upon 'official notification' that the proposal will be funded. This notification is in the form of an Award Notification. The Notification is usually received by the President and/or the [Pre-Grants and Contracts Administrator \(PreGCA\)](#) (who also serves as the Authorized Organization Representative (AOR), the Principle Investigator/Fiscal Officer and/or the [Associate Vice President of Sponsored Programs](#).

Once this notification is received the [PreGCA](#) prepares an Activation Package which includes the Activation Memorandum to the Principal Investigator/Fiscal Officer (PI/FO). The [PreGCA](#) works with the [PostGCA](#) to schedule an orientation meeting with the PI/FO, involved faculty and staff. It is important that administrators of the project are involved and informed of the compliance issues, policies and procedures.

Workflow to the accounting side of Sponsored Program ensures that fiscal information and calculations are accurate and complete.