



Proactivity for Award Set-Up

When PI/Unit are informed that a proposal has a high likelihood of funding, will be funded, or is funded, please follow these steps to facilitate timely award set up.

1. Review the Grants Portal FP Record to confirm all data fields (including Management Unit, Academic Credit, and IDC Distribution) were answered correctly. If the preproposal budget includes International Travel, Basic Information page 2 Question #8 should be answered “yes” and the foreign travel location must be inserted. If the proposal is not federally funded and you have the sponsor contact information, this should be inserted into the Grants Portal Non-Federal Submission Information page. If any updates are needed, email the SPA Awarder who can make the changes and re-route the proposal for approval.

2. Confirm the Grants Portal FP Record is **Fully Approved**.



a. Log into Grants Portal, open FP Record, scroll down and click on Transmittal Data Tab.

b. Scroll down and check the WAITING ON section,



- i. If no individuals/units are shown, the FP Record is Fully Approved.
- ii. If individuals/units appear, the FP Record is not fully approved. Their approvals must be completed. If an individual listed has left UGA, please alert SPA so they can be removed from the proposal record.

3. Confirm all Compliances are complete.

a. Log into Grants Portal, open FP Record, go to the Compliances page.

Compliances

1. For each item listed below, indicate if it is involved in this project:

- * Human Subjects: Yes No [Clear](#)
- * Animals: Yes No [Clear](#)
- * Recombinant DNA: Yes No [Clear](#)
- * Hazardous Materials: Yes No [Clear](#)
- * Animal Use (Client Owned): Yes No [Clear](#)

b. Check the first section:

- i. For any compliance areas marked YES
 - A. Click Continue at the bottom right corner.
 - B. Answer the questions and upload documents, if prompted to do so.
- ii. If all compliance areas are marked NO, proceed below.

c. Check the second section “Financial Conflict of Interest Disclosure”

FCOI Disclosure Date	Affirmative FCOI Disclosure	Training
		Training Course Expiration Date
8/22/2023	no	Conflict of Interest 8/5/2025

- i. FCOI Disclosure Date must be within the last year. If not, an updated Disclosure is needed.
- ii. COI Training Expiration Date must be in the future. If not, training must be completed.

4. Confirm Budget Allocation/s are complete. To ensure the budget is set up consistent with your anticipated spending and in compliance with the sponsor requirements, utilize the [Budget Allocation Job Aid](#) to prepare at least one budget allocation for each project. When preparing budget allocations, please consider:

- a) If additional chartstrings are needed:
 - a. Other units will incur expenses;
 - b. If cost sharing was committed; and
 - c. If funds are restricted for specific purposes.
- b) If any anticipated expenses are normally not allowable and justification for the exceptional circumstances was not previously provided, please provide this justification now.

5. Were Additional Documents provided to sponsor and not SPA? If so, please upload these into Portal!

Completing these five steps, as soon as you learn that funding is likely, will save considerable time in the award set up process.