

**Sponsored Project Responsibilities Matrix**

<b>Proposal Preparation</b>	<b>OGRD</b>	<b>PD/PI</b>	<b>College Financial Officer</b>	<b>Chair and Dean's Office</b>	<b>Business and Finance</b>
<b>Preparation</b>	Interpret guidelines Set timeline If enough time allowed, develop and provide template(s)	Adhere to guidance set forth and timeline developed	-	-	-
<b>Budget</b>	Provide budget workbook Conduct final review for compliance	Draft budget with fiscal support/CFO	Ensure FTE is appropriate and budget is adequate	Approve internal match, as needed	
<b>Approvals and Compliance</b>	-	Complete <a href="#">forms</a> prior to submission	-	Approve via workflow	-
<b>Subawardees</b>	Provide all subaward initiation documents as needed Conduct risk assessment	Communicate early in the process about the inclusion of subawards Facilitate completion of initiation documents/ activities	-	-	-
<b>Proposal Submission</b>	Submit proposal	-	-	-	-
<b>Award Set-up</b>	<b>OGRD</b>	<b>PD/PI</b>	<b>College Financial Officer</b>	<b>Chair and Dean's Office</b>	<b>Business and Finance</b>
<b>Contractual Agreements</b>	Negotiate all terms and conditions Route for EWU signature, as needed	-	-	-	Sign agreement, as needed
<b>Initial Activities</b>	Request award index Request ICR index, as needed Provide index to PD/PI, CFO, other support	Responsible for all programmatic aspects of the project and project management Connect with fiscal support/CFO for PAFs Respond to Procurement request for purchasing queue, notify OGRD if others are added as budget authorities	Initiate PAFs before start date Request index be added to pcard by Procurement office, as needed	-	Create index

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<b>Terms and Conditions</b>	Review terms and conditions and formal agreement with PD/PI to outline expectations and compliance issues	Be familiar with the terms and conditions of the project	Support, as needed	-	-
<b>Orientation</b>	Provide Orientation, resources and tools for PD/PI	Responsible for all aspects of project management and expectations including tracking, record keeping, and reporting	Attend orientation as needed  Communicate regularly with OGRD and PD/PI as needed	-	-
<b>Subawardees / Subcontracts</b>	Set subawardee level of risk, monitoring schedule  Prepare agreement  Route for EWU signature	Facilitate information requests and entity signature  Work directly with Procurement office for basic Service Agreements	-	-	Sign agreement  Encumber agreement
<b>Award Management</b>	<b>OGRD</b>	<b>PD/PI</b>	<b>College Financial Officer</b>	<b>Chair and Dean's Office</b>	<b>Business and Finance</b>
<b>Personnel</b>	Verifies funding available for hire  Verify PAFs	Work directly with HR or Student Employment to hire personnel  Connect with CFO to initiate faculty/staff PAF changes  Connect with Student Employment to initiate student employee changes	Revise PAFs in timely manner, as needed	Approve, as needed per college procedure	Facilitate hiring process, as needed  Process PAFs
<b>Match</b>	Provide match tracking and verification worksheet, as needed  Track match  Submit to funder	Monitor work provided via match  Sign match worksheet(s), attach documentation, forward to OGRD	-	Support matched time, if internal  Provide matched items/activities, as applicable	-
<b>Reporting</b>	Prepare and submit all financial reports	Prepare and submit programmatic reports  Ensure expenses reconciled  Provide draft report/expenses determined by funding source	-		

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<b>Changes to Scope of Work</b>	Initiate communication with funder or formal request	Communicate with OGRD immediately	-	-	-
<b>No Cost Extension (NCE)</b>	Initiate communication with funder or formal request	Communicate with OGRD at least 90 days prior to award end date to discuss a NCE	-	-	-
<b>Subawardees / Subcontractors</b>	Process invoices Conduct subrecipient fiscal monitoring	Monitor work provided by contractor Sign invoices, forward to OGRD	-	-	Pay invoices
<b>Ongoing Compliance</b>	Inform PD/PI of ongoing compliance requirements, including effort certification	Address all ongoing compliance requirements, including effort certification	-	-	-
<b>Fiscal Management</b>	<b>OGRD</b>	<b>PD/PI</b>	<b>College Financial Officer</b>	<b>Chair and Dean's Office</b>	<b>Business and Finance</b>
<b>Budget Monitoring</b>	Initiate access to Tableau library Develop and provide Budget Monitoring workbook via OneDrive folder	Responsible for award budget Update Budget Monitoring workbook monthly Identify erroneous charges, see "Journal Vouchers" below	Support, as needed	-	-
<b>Budget Modifications</b>	Work with PD/PI on significant rebudgeting Request funder approval, if needed	Connect with OGRD for significant rebudgeting or required funder approvals, as needed	-	-	-
<b>Purchasing</b>	Verify and sign Pcard statement/documentation	Initiate purchase with CFO/fiscal support Complete A-19s, as needed	Make purchases Send grant-specific sections of Pcard statement/documentation to OGRD for signature	-	Pay Pcard charges
<b>Invoices</b>	Process invoices	Approve invoices, email to OGRD Retain and provide invoice copies to OGRD as requested	-	-	Pay invoices
<b>Journal Vouchers (JV)</b>	Verify form	Identify erroneous charges and communicate to CFO/fiscal support	Complete JV form	-	Process form

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<b>Travel</b>	Verify travel	Follow EWU travel procedure in Concur	Support, as needed		Approve travel Process advance, as needed
<b>Professional Services</b>	Verify and approve	Work directly with Procurement office for Service Agreements  Review and approve expenses and work performed	-	-	Encumber agreement
<b>Billing</b>	Verify invoice form and supporting materials  Submit invoice to funder	Prepare Billing Packet, send to OGRD at least 5 days before due date	Support, as needed	-	Complete EFTs and drawdowns
<b>Close Out</b>	Review requests for index deactivation  Submit final invoice to funder	Verify index balance is \$0.00  Request from the index to charge excess expenses to Chair/Dean, as needed, if not charging to award's indirect cost recovery index  Contact Procurement office to remove any remaining encumbrances  Contact budget authorities to stop any other reoccurring transactions  Prepare final Billing Packet	Prepare JV, as needed  Revise PAFs, as needed  Request index deactivation	Provide index to charge any excess expenses to, if not charged to award's indirect cost recovery index	-

*All disallowed costs are the responsibility of the PI/College*