Grant Policies

1. **Purpose**

   To communicate the related policies for members of the University who are funded by grants, and to provide guidelines for grant related expenditure.
2. **Overview**
   - In the process of applying for the grant, the Principal Investigator (PI) or potential grantee must contact Joan McGrath at the Research Office.
   - In the post award stage, the grantee's budget is set up by Michelle Bates in the Office of Business and Financial Services.
3. **General Instructions**
   - If the Principal Investigator has established a more detailed budget than that supplied to the award agency, the grantee may contact Michelle Bates for clarification and further information.
   - In the case of a multi-year grant, budgets are only input on a yearly basis. Michele Bates is available for assistance with reading its specifications.
   - Once a grant has been awarded, the PI may conduct related accounting processes through the Office of Business and Financial Services. These processes include purchases, reimbursements, cash advances, budget reports, and related questions. Budget reports are printed monthly and sent directly to the department of the grantee.
   - Confirm reporting dates with the Office of Business and Financial Services in order to have interim and/or final financial reports sent to the reporting agency in a timely manner.
   - If a grant is run out of the Marsh Institute, the grantee must contact the Marsh Institute for approval of grant-related expenses, and then submit the expenses to Michele.
4. **Grant related travel expenses**
   - For grant-related travel, the grantee may request a cash advance (XLS file) prior to the trip.
   - For reimbursements incurred during a grant-related trip, a travel expense report may be filed and submitted to the Office of Business and Financial Services. Instructions on filling out a travel expense report are available in the Travel Guidelines section of the manual.
   - An alternative procedure for reimbursements is to fill out a check request form. Instructions on filling out this form are available in the Check Request (XLS file) section of the manual.
5. **Other grant related expenses**
   - Grant funds are also used, where applicable, for related purchases of supplies and equipment. In order to make these purchases, the grantee must submit a purchase order to the Office of Business and Financial Services department. Instructions on filling out a purchase order are available the Purchasing Section of the manual
   - Grant funds may also be used as payroll for the grantee and/or people hired to work on the funded project. All employees to be paid by a grant must fill out a Grant Payroll Authorization form (PDF) and submit it to the Payroll Office for processing.