

# Award Setup Guide for Sponsored Projects

## November 2022

### V1.0

In addition to the Notice of Award, Sponsored Projects Accounting (SPA) needs the academic unit to provide a set of specific information about Worktags, budget and compliance so that we can complete the set up process. We will request this information at the beginning of our award in-take process, but the department can also send to us prior to that request. Additional delays in setting up the project in WD frequently occur when SPA and the department have to go back and forth to clarify/correct this data.

#### **Award Setup Template:**

SPA's primary tool/guide is the Award Setup Template and you can download [here](#). This form must be completed by the academic unit and submitted to SPA so that we can initiate the set up process in WD. The form should include all Grant Lines known at the time of profiling; including subaward, cost share or program income lines.

Prime Award Line - need Nickname, Grant Hierarchy, Cost Center, Assignee and Region  
Center Cost on Prime Award Line and in RMS should match, if they do not, please clarify which is correct (**hard stop**).

Additional Award Lines - need Nickname, Grant Hierarchy, Cost Center, Assignee, Region, Type, From Date and To Date

When requesting an allocation for a subaward, make sure the subaward line includes both directs and indirects for the subaward and the indirects for the WUSTL portion (first \$25k) (**hard stop**).

Check your debit account (CC, GF or PJ) for cost share grant lines and make sure grant worktags are allowable (**hard stop**).

FR (FFR Owner) and AS (Assignee) must be assigned in WED for new PIs and Fellows BEFORE SPA is able to proceed with profiling the award (**hard stop**). Note: We cannot set up a grant line unless there is a valid FFR Owner and Assignee in WD.

#### **Budget Detail:**

Submit detailed budgets to SPA for each award/grant line (GR#) denoted on the Award Setup Template, via Excel worksheet. Ensure the total budget of the award/grant lines equals to total the award amount (**hard stop**). Note: WD requires a budget amount for each expense category that will be used. You can't charge expenses to Travel unless you have dollars budgeted in Travel.

#### **Compliance:**

Verify all Key roles and all non-Key roles of PD/PI, Co- PD/PI, Faculty, Co-Investigator, Other (Professional) Mentor or Other (Specify) Sponsor have current Financial Disclosure Statement, Financial Conflicts Of Interest and if applicable, Human Subjects Education (**hard stop**). Subaward personnel are excluded from this requirement.

If award was proposed with Human Subjects or Animals, please upload current protocol to RMS, or forward to Grants Specialist assigned to the award. Ensure the title, PI, and funding source match the award.

The completed information package described above can be sent the applicable SPA mailbox below. Please reference the corresponding RMS Record Number (P#), Workday Award Number (AW#) and/or the Workday Grant Number (GR#) as applicable in the email.

DHHS Team: [SPAdhhsgrants@wustl.edu](mailto:SPAdhhsgrants@wustl.edu)

Contracts Team: [SPAContracts@wustl.edu](mailto:SPAContracts@wustl.edu)

Private Team: [SPAprivategrants@wustl.edu](mailto:SPAprivategrants@wustl.edu)

Other Federal Team: [SPAothergovtgrants@wustl.edu](mailto:SPAothergovtgrants@wustl.edu)

DRAFT