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 WD 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.

**Terms and Definitions:**

RMS# - The Record Number assigned to the award in the Research Management System (RMS). Format = (P + two digit fiscal year and five number digits (e.g., P23-12345)

Nickname - Enter the Nickname for the award that you would like included in the Award and Grant names to assist when searching. Recommended length = 5-15 characters. Default = first six initials of award title.

Grant Hierarchy - Grant Hierarchy is the hierarchical structure associated with the Grant worktag and is an organizational structure that can be used to manage how a unit wants to route transactions needing approval. Format = GX plus five number digits (e.g., GX12345)

Cost Center - Cost Center is a component of WashU's FDM (Financial Data Model). A cost center is considered the lowest level of fiscal responsibility (under Company and Business Unit) as defined by business areas. As a driver organization worktag, it can be configured with allowed worktags, as well as a required default worktag that determines what worktags are allowed on and default into operational transactions. Cost Center has one associated hierarchical structure. A cost center can only be tied to one business unit and one Company. Format = CC + seven number digits (CC1234567)

Assignee (PI) – The faculty member assigned to this particular Grant Line (e.g., Principle Investigator, Co-Principal Investigator, Project Director or Key Personnel).

Region - Region is used to track activity by regions as defined by WashU to support reporting needs. Region may distinguish between off campus (for all schools) and/or wet/dry labs (for School of Medicine only). Wet/dry designation is not required for Danforth Campus awards.

Type – Describes the type of Award/Grant line.

- VUC = voluntary uncommitted (cost sharing)
- VC = voluntary committed (cost sharing)
- M = mandatory (cost sharing)
- Sub {Entity} = subaward to {Entity}
- Supp = supplement
- CFwd = approved carryforward
- Unavailable = restricted unobligated balance
- Restricted = otherwise restricted balance
- PP = Per Patient
- FF = Fixed Fee
- CR = Cost Reimbursable
- FP = Fixed Price (able to retain balance)
- P&F = Pilot and Feasibility
The completed information package described above can be sent to 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

Contracts Team:  SPAContracts@wustl.edu

Private Team:  SPAPrivategrants@wustl.edu

Other Federal Team:  SPAOthergovtgrants@wustl.edu