

PI GUIDE REVISION NOTES – JUNE 2024

WHERE TO START

- **Pg. 4, par. 1:** Revised to provide additional information and clarify the start-up process when receiving a new grant.
- **Pg. 4, par. 4:** Added information regarding the FMS Security Request.

PRE-AWARD SPENDING

- **Pg. 7, par. 1:** Added information regarding Institutional Prior Approval System.

HOW TO PROCESS EXPENDITURES ON A GRANT

- **Pg. 8, par. 1: *Salary/ Fringe.*** Added information regarding Personnel Action Forms. Added information regarding the requirement to monitor payroll expenses and subsequent communication with sponsor and OSPR.
- **Pg. 8, par. 3: *Technology Accessories and Equipment.*** Clarified the need for pre-approval from ITS for certain purchases.
- **Pg. 8, par. 4: *Travel.*** Added information regarding the pre-existing International Travel policy.
- **Pg. 8, par. 5: *Independent Contractors.*** Clarified the need for ICAs to be completed prior to services.

ALLOWABILITY OF COSTS

- **Pg. 14, par. 5: *Links to federal regulations.*** Updated links with additional information.

SELECT ITEMS OF COSTS

- **Pg. 15, par. 3 & 8: *Technology Accessories and Equipment.*** Added information regarding the Specialty Purchase Process.
- **Pg. 16, par. 6: *Supplemental Payments.*** Added information regarding the request form for supplemental payments.
- **Pg. 17-18, par. 8: *Travel Expense Guidelines.*** Added and clarified multiple requirements regarding the University Travel and International Travel policies.
- **Pg. 18, par. 3: *Rental Car.*** Revised and added information regarding university agreements with transportation providers.
- **Pg. 18 – 19, par. 4: *Meals.*** Added information regarding per diem, room service, and grant related receipts.

- **Pg. 19, par. 2: *Meals for Conferences and Meetings*.** Clarified need for itemized receipts.
- **Pg. 19, par. 3: *Hotel*.** Added information regarding non-conventional lodging, including but not limited to Airbnb and Vrbo.
- **Pg. 20, par. 1: *Airfare*.** Added information regarding the Fly America and Open Skies Agreements.

EXTENSIONS AND BUDGET REVISIONS

- **Pg. 24, par. 1 & 5:** Added additional information regarding the Post-Award Modification form, necessary to make changes to currently funded projects.

APPENDIX

- Added documentation for submitting FMS security requests.
- Removed National Science Foundation Award Cash Management Services procedure.
- Removed Subrecipient Monitoring Guide & Resources
- Removed Award Closeout Checklist