PI QUICK GUIDE TO GRANT PROCESS & CONTACT INFO

APPLYING FOR GRANT

PROPOSAL & BUDGET DEVELOPMENT	PI responsibility – 1) **Notify ORSP** immediately when you **are intending to submit a grant application** and your deadline. 2) Send the **Routing Sheet,** Request for application (RFA) or **Funding Opportunity Announcement** (FOA) **and** **Budget** to ORSP *for approval a minimum of 10 business days prior to submission deadline*. (**Note**: ORSP will send the forms to you once notification received.) If you need assistance or have questions on the Proposal, Budget contact via email: CSUP_ORSP@csupueblo.edu

SUBMISSION

PROPOSAL REVIEW & SUBMISSION	Submit all remaining required documents per the RFA in **Word** format to ORSP for review a minimum of *five business days prior* to submission deadline. By deadline date ORSP will send preview of proposal submission to PI for final approval and then submit.
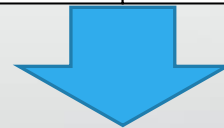
AWARDED GRANT

GRANT AWARD NOTIFICATION (GAN)	PI to forward email to CSUP_ORSP@csupueblo.edu. ORSP will send email back to PI with necessary forms needed to set up grant account.

SET UP GRANT ACCOUNT
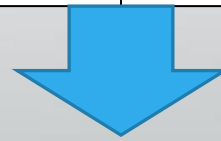
PROJECT ACCOUNT & BUDGET SET UP	PI to fill out forms (provided via email from ORSP or you can also find them on the ORSP website) and obtain signatures as need by supervisor and/or dean. You will need to determine who will be Fiscal Office and Budget Manager on the account. **PI cannot be both**! If you need assistance or have questions regarding forms, contact via email: CSUP_ORSP@csupueblo.edu
SET UP KUALI FINANICAL SYSTEM ACCESS (KFS)	If you or whomever will be fiscal officer and/or managing the budget **_do not_** have KFS access, you will need to create a CRA form and complete KFS training. **DO NOT DELAY!** Once training is complete it could take up to 2-4 weeks for access to be given! Email Kimberly Stanley at kimberly.stanley@csupueblo.edu for information on KFS access and the Kuali New User slides. You can also self-enroll in Blackboard training at: https://www.csupueblo.edu/business-financial-services/kuali-financial-system/training.html **CRA form**: https://www.csupueblo.edu/information-technology/services-and-systems/computing-resource-application.html

HIRING/PAYING PEOPLE FROM GRANT ACCOUNT

HIRING/PAYING PEOPLE FROM GRANT ACCOUNT

Personnel Action Form (PAF) – Use when *current* CSU Pueblo employee will be paid partially or all salary directly from grant. For questions or assistance contact HR via email: CSUP_HR@csupueblo.edu or call 719-549-2441.

   For form go to: I:\University Common\Human Resources forms

FileBound – Use when current CSU Pueblo employee will be paid a *supplemental* pay from grant or when hiring *student research assistant*. PI or admin in department will need to enter job request in FileBound. You may need submit a CRA for access to FileBound if you haven't used it before. For questions or assistance with FileBound contact IT Alan Bruning via email at alan.bruning@csupueblo.edu or call 719-549- 2354

Non-Student Hourly (NSH) – Use for people paid by the grant who are *neither current students nor current employees*. For Policies & Procedures regarding non-student hourly employees go to HR website:

   Policies & Procedures | Policies & Procedures | CSU-Pueblo (csupueblo.edu)
      For form go to: I:\University Common\Human Resources forms
      Submit the NSH form to: CSUP_HR@csupueblo.edu

Reassigned Time – Clear with chair & dean and email CSUP_HR@csupueblo.edu with name, PID number, monthly pay amount, reassigned time start and end dates and KFS account grant account number. Process via PAF (Personnel Action Form).
      For form go to: I:\University Common\Human Resources forms

Student Employment Positions – They have their own processes such as job announcements, referrals and so forth. If you have not hired a student previously you will need to submit a CRA for access to the HR module in AIS prior to having the student ready to be hired on the grant. If you have any questions, please contact Student Financial Services (SFS) Student Employment via email: csup_sfsstdemployment@csupueblo.edu or call 719-549-2753 .

PURCHASING	
PURCHASING SUPPLIES & EQUIPMENT	Refer to https://www.csupueblo.edu/purchasing/index.html for up-to-date information on how to process purchases based on the nature of the purchase and the dollar amount. _All University Travel processes MUST be followed **before travel occurs!**_ Need assistance or have questions regarding purchases contact the Procurement Office. Email: deirdre.gonzales@csupueblo.edu Phone: 719-549-2355 Email: chris.fendrich@csupueblo.edu Phone: 719-549-2054

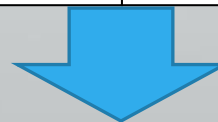| **GRANT ACCOUNTING**	
GRANT ACCOUNTING	PI monitors expenses and budget status. PI works with Grant Accountant for monthly draw downs or invoicing processes. Need assistance or have questions regarding grant accounting/post award contact Business Financial Services. **Email**: brendan.reilly@csupueblo.edu **Phone**: 719-549-2952

| **REPORTING** |
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| REPORTING | *Non-Financial Reports*: PI submits technical and programmatic progress reports as required by sponsor. Contact sponsor contact person for assistance with report. Sponsor contact is listed on GAN (Grant Award Number) document.

Financial Reports: Grant Accountant prepares periodic financial reports and granting agencies.

Financial Statement Information: Grant Accountant prepares information for financial statements as well as annual SEFA report and ad hoc requests. |

| **NO-COST EXTENSIONS** |
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| NO-COST EXENTION REQUESTS | PI can request a no-cost extension from the granting agency if more time is needed to complete the grant when allowable.

Pi is responsible for providing copies of no-cost extension correspondence to OSP and the Grants Accountant. This ensures the grant account is not closed using original project end date. |
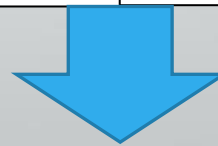
CLOSEOUT

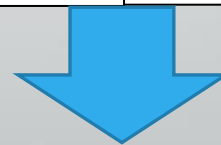| CLOSEOUT | At project end date and after the allowable days for finalization of expenditures (per the terms and conditions), the Grants Accountant will inactivate the KFS account and expenditures can no longer be posted to it. |
| | The Grants Accountant will manage all final financial reporting in consultation with the PI and OSP as needed. |
| | For deliverable or fixed price contacts, unexpended funds will be handled according to the award/contact terms and conditions. |
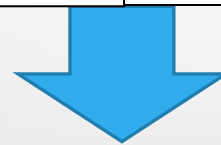
RECORDS RETENTION

| RECORDS RETENTION | Records must be retained according to university, sponsor and federal regulations. Records associated with federally-funded sponsored programs must be retained for the latter of **six (6) years** following submission of the final financial report or until all existing audit questions have been resolved. |

GENERAL CONTACT INFORMATION

OSP (Office of Sponsored Programs) Pre-Award or general grant questions	**Email**: CSUP_orsp@csupueblo.edu **Phone**: 719-549-2278
BFS (Business Financial Services) Grant Accountant/Post-Award questions	**Email**: brendan.reilly@csupueblo.edu **Phone**: 719-549-2952
BFS (Business Financial Services)- Accounting Kuali Financial Services (KFS) – Data entry questions re: Travel Authorizations/Reimbursements	**(Nicole aka Antwanette Lara)** **Email**: nicole.lara@csupueblo.edu **Phone**: 719-549-2355
HR (Human Resources) Hiring/Paying people from grant funds	**Email**: CSUP_HR@csupueblo.edu **Phone**: 719-549-2441
PURCHASING/PROCUREMENT Purchasing/Travel	**Email**: deirdre.gonzales@csupueblo.edu **Phone**: 719-549-2355 **Email**: chris.fendrich@csupueblo.edu **Phone**: 719-549-2054
Director of Research Questions on preparing written grant proposal	**Email**: john.Williamson@csupueblo.edu **Phone**: 719-549-2278 (message only)
IT Technician Questions on FileBound	**Email**: alan.bruning@csupueblo.edu **Phone**: 719-549-2354
Student Financial Services (SFS) - Student Employment Questions on Student Employment	**Email**: csup_sfsstdemployment@csupueblo.edu **Phone**: 719-549-2753

GENERAL CONTACT INFORMATION CONTINUED

For questions regarding any of the below topics please contact:

Email: csup_research@csupueblo.edu   **Email**: john.Williamson@csupueblo.edu   **Phone**: 719-549-2278 (message only)

If question regarding IRB, please contact IRB Chair Barbara Brett-Green at barbara.brettgreen@csupueblo.edu

Visit our website for more information on Compliance Training, IRB, IACUC and/or Biosafety:

https://www.csupueblo.edu/research-and-sponsored-programs/compliance-and-review-boards/index.html

Funding Opportunities
Proposal Editing
Research Collaborations
Compliance Training
IRB (Institutional Review Board)
IACUC (Institutional Animal Care & Use Committee)
Biosafety

LINKS TO FORMS/RESOURCES

ORSP Routing Sheet https://www.csupueblo.edu/research-and-sponsored-programs/_doc/2021-osp-routingform.docx	**HR (Human Resources) Policies & Procedures** Policies & Procedures | Policies & Procedures | CSU-Pueblo (csupueblo.edu)
Budget Spreadsheet Template https://www.csupueblo.edu/research-and-sponsored-programs/_doc/csup-budget-excel-template-01012021.xlsx	**Procurement/Purchasing** https://www.csupueblo.edu/purchasing/index.html
Kuali Blackboard https://www.csupueblo.edu/business-financial-services/kuali-financial-system/training.html	**Retention Policies** (Under Financial Document Record Retention PDF *see 4-13. Grant Files*) Rule 10 - Records Retention | Financial Policies & Procedures | CSU-Pueblo (csupueblo.edu)
CRA form https://www.csupueblo.edu/information-technology	**OSP forms** https://www.csupueblo.edu/research-and-sponsored-programs/faculty-resources/forms-and-guidance.html
PAF (Personnel Action Form)/Non-Student Hourly I:\University Common\Human Resources forms	**PI Manual** https://www.csupueblo.edu/research-and-sponsored-programs/_doc/csup_osp_pi_manual_01012021.pdf
OCG (Office of General Counsel) Routing Sheet https://www.csupueblo.edu/general-counsel/_doc/routing-form-template1.docx	**Student Financial Services (SFS) – Student Employment** https://www.csupueblo.edu/student-financial-services/student-employment.html

Most up-to-date PI Quick Reference Guide can be found on the ORSP website under Faculty Resources
https://www.csupueblo.edu/research-and-sponsored-programs/faculty-resources/index.html