

Post-Award Management Standard Operating Procedure (SOP)
WSU Elson S. Floyd College of Medicine Office of Research

Monthly Reporting

1. PI will receive monthly reporting on award expenditures and balances from Office of Research (OOR) via Research Administrators (RA). These reports should arrive no later than the last full week of the following month.
 - a. Salary and benefits encumbrances will be included.
 - b. Benefits rates used will be the historical rate for that individual.
 - c. Additional projections (i.e. per diems, contracts etc.) may be provided at PIs' request.
2. Ras will prepare and send these reports monthly unless otherwise communicated.
3. All reports will be provided to both the PI and the PIs chair (as requested).
4. The PI should request meetings, at least quarterly, to review expenditures on grant accounts.

Personnel Assignments

1. PI should review personnel assignments on their grants monthly. This information should be found on the expense detail tab on the monthly reports. PIs should email their RA if staff assignments need to be set-up or changed outside of the routine budget cycle.

Invoices and other Expenditure approvals

1. Subaward invoices are sent directly to SPS@wsu.edu and routed to the RA in Workday.
2. RAs will download the invoice from Workday and contact the PI to obtain approval for payment of the invoice. Once approval is obtained, the RA will approve the subaward invoice in Workday and document the approval in Workday.
3. Purchase requests and PCARD purchases being processed in the Purchasing Request System should be fully justified by the requesting party. Faculty are encouraged to remind their staff to provide complete explanations which include the following:
 - a. A layperson's description of the item/s being purchase
 - b. How the purchase is necessary to the project
 - c. In cases where items being purchased are either general use, food, participant incentives or travel, the justification needs to address whether it has been approved to be charged to the grant or how it specifically serves the interests of the project being funded by grant funds.
 - For example, instead of inserting a statement such as, "This work or item is related to the project," please be specific to how the item in question is related to a specific project.

IMPORTANT NOTES:

1. While the OOR staff are available to assist PIs in the financial management of their grants and other funds, PIs are ultimately responsible for good stewardship of their grant funding.
2. If additional services are needed, please email medicine.grants@wsu.edu with requests.