

| Activity | Initiated By | Form to Be Completed | Time Frame | Submit To | Notes |
|--|--|--|---|----------------------------|---|
| Pre-award Spending | Department Grant Manager | Advance Account Request Form | Before official NOA is received | Sponsored Research Manager | Dept. is ultimately responsible for costs incurred Contact OSP |
| Prepare and Assign Expenditure Type Budget Categories | Sponsored Research Manager (in most instances) | Budget Template | When official sponsor NOA is received | Sponsored Research Manager | Expenditure Types used are based on awarded budget categories |
| Account Statement (OGA IRA Report) | Dept. or OSP | Run pertinent OGA IRA Report | Monthly | SRM/DGM | Monitor Financial Activity of the project. |
| Initiate New Subawards | DGM | RAPPORT Modification Request | Start of project, or when need is identified | SRM | Might Require Sponsor approval Contact OSP |
| SPUD Journal Entry | Dept. Grant Manager/Finance Center | Electronic CJE001 SPUD Journal Form, completed forms needs to be attached to an OnBase Request Form | As Needed | SRM | If it is an original charge or qualifies as a Simple Reclassification (check with OSP) Contact OSP |
| Cost Transfer SPUD Journal Entry | Dept. Grant Manager/Finance Center | Complete CTX001 SPUD Journal Cost Transfer Form, completed form needs to be attached to an OnBase Request Form | Within 90 days of the original transactions GL Transferred Date | SRM | Must have justification, date & appropriate approvals |
| Rebudget | Dept. Grant Manager | RAPPORT Modification Request | Prior to rebudgeting | SRM | Prior approval by OSP or Sponsor, depends on the terms and conditions of the NOA Contact OSP |

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| No Cost Extension | PI/DGM | Letter or RAPPORT Modification Request | At least 30 days before project is due to end | SRM | Prior approval by OSP or Sponsor, depends on the terms and conditions Contact OSP |
| Payroll Authorization | Dept. Grant Manager or Dept. HR Manager | Payroll Authorization Form | Monthly or Bi-Weekly | Finance Center | Based on sponsor approved budget, Dept. should contact their Finance Center for more information |
| Labor Verification Report by Project | OSP | PI approves report based on all employees charged to the project | Due back to OSP within 30 days of receiving report | OSP | Contact OSP |
| Wage Transfer | Dept. Grant Manager/PI/Finance Center | Wage Transfer Form OnBase Request Form | Needs to be submitted within 90 days of the original GL transferred date | SRM | Based on sponsor approved budget. Contact OSP/Finance Center |
| Tuition Remission | Dept. Grant Manager/PI | Tuition Remission Form | Per Term | SRM | Based on sponsor approved budget. Contact OSP |
| Travel | Dept. Grant Manager/PI | I-Expense Form for Dartmouth Employees, OnBase Payment Request Form for Dartmouth students and non-Dartmouth employees | Within 30 days of returning from trip | Finance Center | See Dartmouth College Travel Policies Contact Finance Center |

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| Cash Advances | Dept. Grant Manager/PI | Cash Advance Form | Date as agreed upon issued of cash advance | Cashier's Office | See Dartmouth College Policies on Cash Advances Contact Cashiers Office |
| Supplies & Materials | Dept. Grant Manager/PI | Submit dated & itemized invoices as OnBase p-card, OnBase payment request form, or iExpense form | Within 30 days of receiving invoice | Finance Center | OSP staff monitor appropriateness of charges Contact Finance Center |
| Request for Payment | Dept. Grant Manager/PI | OnBase Payment Request Form | | Finance Center | Review list of items that need OSP's approval Contact Finance Center |
| MIPV | Dept. Grant Manager/PI | OnBase Payment Request Form | | Finance Center | Review list of items that need OSP's approval Contact Finance Center |
| Invoices | Dept. Grant Manager/PI | OnBase Payment Request Form | | Finance Center | Review list of items that need OSP's approval Contact Finance Center |

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| Charged Services | Service Center | Submit service center journal | Monthly | Service Centers can upload their own journals | OSP staff monitor appropriateness of charges Contact Service Center |
| Consultant Fees | Dept. Grant Manager/PI | Submit signed & dated Consultant/Independent Contractor Form via Contract Management System and invoice via OnBase Payment Request Form | OSP approves if a PTA Account is involved then it is sent to Procurement Services for processing | Procurement Services | Consultant/Ind. Contractor Form, Purchase Order. |
| Capital Equipment | Dept. Grant Manager/PI | Submit signed & dated invoice via OnBase Payment Request Form | Within 30 days of receiving invoice | SRM | See Dartmouth College Equipment Capitalization Policy Contact Fixed Assets Coordinator |
| Technical Reports | PI | As indicated in sponsor's NOA | As indicated in sponsor's NOA | Sponsor | Contact OSP for direction, if needed |
| Financial Reports | OSP | As indicated in sponsor's NOA | As indicated in sponsor's NOA | Sponsor | Contact OSP |
| Closeout of Award | OSP | Internal Procedures | OSP determined | Records | Official repository of project documents Contact OSP |