AWARD NO.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Managing Effort: Award to Closeout Checklist

1. When you receive a Chart of Accounts (COA):

* Confirm effort commitment
  + Contact PI to confirm the amount of effort that will be expended as paid salary or cost share

(Example: If 1 month was the proposed commitment but now the PI would like to commit .5 months, .5 months will need to be cost shared and .5 months will be paid)

* Check accuracy of effort entry on the Team Page (entered by your C&G)

🡪Query: GMQ\_EFFORT\_CURRENT\_BY\_PI

* Update effort tracking worksheet- enter commitment amount, calculation information, and LAM % with notes
* Enter the effort percentage(s) in the LAM and/or plan for summer salary (S-contract), if needed.

1. During the life of an award:

* Review grant accounts monthly to verify accurate allocations of salary and cost share
* Verify accuracy of commitment and expenditure numbers on effort reports (three times a year)

1. At Closeout- Reviewing the Automated Closeout Report (ACR):

* Ensure all effort commitments are met
* Update LAM entries for employees paid on the award\*

(\*Note: Terminated employees cannot be removed- write a note on the ACR indicating the employee was terminated)