University of Hawai'i – West O'ahu
Flowchart of the Extramural Award/Grant Process

IDEA Inception

- Identification of the extramural award/grant opportunity.
- Review of prospective extramural award/grant terms/conditions to determine eligibility.

Step #1
Consultation with Institute for Engaged Scholars (IES)

- PI prepares "Proposal Concept Form" (PCF), which is routed to Business Affairs (BA), Human Resources (HR), Office of Research Services (ORS), respective Division Chair, respective Vice Chancellor, and Chancellor for review and comment (as applicable). BA routes PCF to various Directors (IT, Facilities, etc.) as necessary with a copy to the Vice Chancellor for Administration.
- Develop proposal development timeline.

Step #2
Proposal Development

- Administrative Officer (AO) assigned to Principal Investigator (PI).
- PI consults with Institutional Research Board and Evaluation and Institutional Research (IR) Office, as appropriate. BA and HR review budget and provide comment. PI inputs proposal into myGrants.
- Appropriate approvals are submitted.
- ORS reviews, approves proposal and submits to sponsoring agency.
- Sponsoring agency informs ORS/PI of proposal status.
- If changes are required, sponsoring agency contacts PI. PI contacts IES, AO and BA to assist with proposal revisions.

Step #3
Award

- ORS receives/accepts Grant Award Notification.
- ORS establishes KFS account.
- BA provides KFS access and notifies PI.
- IES holds briefing meeting with appropriate units (PI, AO, IES reprentative, BA, HR, Evaluation IR (others as appropriate).

Step #4
Post-Award

- Administrative staff in consultation with AO prepare fiscal/HR documents.
- PI reviews and approves fiscal/HR documents.
- BA and HR (as applicable) reviews and approves fiscal/HR documents.
- AO or administrative staff print monthly financial report from Page Center and meets with PI to discuss financial status.
- Administrative staff maintain budget to actual worksheets.
- BA prepares monthly reconciliation of actual expenditures (including payroll) and provides to the PI, Project Director, AO and administrative staff.
- PI prepares periodic technical reports (e.g., Annual Performance Report).

Step #5
Award Close-out

- ORS notifies PI of award closeout--90, 60 and 30 days prior to award end date.
- Submit purchase requisitions to BA no later than 30 days prior to award end date.
- Submit invoices and disbursement vouchers to BA and incur PCard purchases no later than 15 days prior to award end date.
- PI should take appropriate actions (e.g., no-cost extension, prepare project close-out report, etc.) in consultation with AO.