

Template for Conducting Monthly PI Meetings

Schedule a routine monthly meeting with each PI to establish and maintain communication. This will provide an opportunity to discuss the status of their research and the activities that may require administrative action. Utilize the automated reports from the Grants Management Dashboard to share information directly whether meeting in-person or virtually and if helpful, send reports or information prior to the meeting to allow time for the PI to review.

Item	Discussion Topics	Workday Reporting
1	Review Award Portfolio	Grants Management Dashboard Report <ul style="list-style-type: none"> • FAU GRT My Awards Report (select by PI Name or Grant Manager)
2	Status of Project Setup (Post Award Actions) <ul style="list-style-type: none"> • RCR/CITI required for students working on federal awards 	Automated notifications are sent <ul style="list-style-type: none"> • Received post award action from OSP • Award is approved and setup • Budget is setup and available
3	Review Expiring Awards <ul style="list-style-type: none"> • Is a NCE needed? • Is FCOI, IRB, or IACUC current? 	Automated notifications sent from Workday <ul style="list-style-type: none"> • 90-day award expiration notice • 45-day award expiration notice • Expired award notice
4	Review Budget Status of Active Awards <ul style="list-style-type: none"> * Review budget categories for available balances and unspent categories * Review effort/personnel charged (personnel are only obligated on a fiscal year basis) * Review sub-award invoices, the status and sub-award balance * Gift Cards (order / how any issued) * Consultant Agreements * Any Cost Transfers needed * Any Budget Amendments needed * Review obligations and commitments <p>Note: It is recommended that Grant Managers reconcile their awards for any manual adjustments such as personnel obligations or outstanding p-card orders.</p>	Grants Management Dashboard Report <ul style="list-style-type: none"> • FAU GRT Grant Inception to Date Report • FAU GRT Grant Inception to Date Report-Expanded • FAU GRT Sponsored Awards Burn Rate Report • Find Supplier Contracts (Sub-awards)

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5	Review Cost Share Required for any awards	Bi-annual cost share reports are issued: <ul style="list-style-type: none"> • In August for reporting period 06/30 • In February for reporting period 12/31
6	Review Quarterly Effort Certifications	Grants Management Dashboard Report <ul style="list-style-type: none"> • FAU Effort Certification in Process • FAU Effort Certification Status Report
7	Award Closeouts	The “Award Task” tab from the award page indicates the closeout status of the automated Award Closeout process in Workday.
8	Invoicing Status of Project (Award)	The “Billing & Receivables” tab from the award page provides a report of invoices issued by Research Accounting and payment status in Workday.
9	Deliverables Submitted by the PI <ul style="list-style-type: none"> • If applicable, notify Research Accountant to invoice for the deliverable submitted by the PI 	
10	Technical / Performance Reports	

This template is a guide for Grant Managers and is not an all-inclusive list of discussion topics.