COERA Post-Award Process

Account Set-Up to Closeout: Post-Award Management through COERA

After contract finalization, OSP will send the award information and award budget to SPAA to establish an account number. When account set-up is complete, a Notice of Award (NOA) will be sent to the PI, Departmental Accounting contact, and COERA.

Award Budget Projecting:

At this time, the COERA team, Department staff, and Principal Investigator will review the award budget and project immediate potential spending needs and communicate any proposal plans or award changes for future planning understanding. For most budgets, COERA will arrange an in-person or zoom meeting with these individuals to collaborate on budget projection for a project kick-off meeting. For small, simplistic budgets, a summary email correspondence may suffice.

In order for COERA to correctly identify immediate budget spending, please provide the following information at kickoff meeting (if changed since submission of proposal and applicable to your project):

- **List of UT Personnel** who will be appointed for the upcoming semester on the project, the salary of each, and the number of months/percent effort per employee:

  - It’s important to review this information and project any potential appointments that will change the overall spending pattern of your budget. Please be aware of and discuss possible changes with COERA.

- **Materials and Supplies** (itemized with exact prices), including software and software licenses.
- **Consultants** you expect to hire immediately at the rate provided for in the proposal. If you are waiting to hire consultants, this process can be delayed until that time.
- **Travel Expenses** for each anticipated trip.
- **Other Costs** that don’t fit into the above categories

Once you have specified the projected needs for the upcoming semesters, a COERA specialist will coordinate with you to finalize the anticipated expenditures.

Appointments:

All appointments for sponsored projects (26-accounts) are coordinated by the COERA Appointment Specialist. Each semester the appointment specialist will reach out to confirm anticipated appointments on your sponsored accounts and will produce the necessary appointment documentation to provide to the department for appropriate and accurate appointments. If you anticipate a large amount or complicated appointments, please reach out to the COERA Appointment Specialist as soon as you can to get the process started in a timely manner.

Subrecipient Monitoring:

Once a subaward has been established, subrecipient monitoring is necessary to maintain federal audit compliance. During contracting, COERA is added as a financial contact to the subaward, while the PI maintains technical contact status. The PI is responsible for collaborating with COERA for subrecipient monitoring duties throughout the duration of the contract.

Subrecipient monitoring consists of:

- Acknowledging receipt of subaward technical and financial reports
- Reviewing and approving subaward invoice expenditures
- Monitoring work progress with Milestones and deliverables
- Coordinating with the subaward for any requested materials from the prime sponsor

COERA will assist you with all of these items.

Project Financial Reporting:

COERA will provide faculty with financial projection reports upon request for sponsored research accounts (see Templates & Examples), however, limited to two times per year (March and October) due to workload maintenance. The reports will consist of:

- Prior expenditures, current expenditures, and cost encumbrances.
- Current account budget and account free balances.
- Projected spending for the remainder of the project year.

Salary Confirmation Reports:

University guidelines require sponsored project salary confirmation to be completed every semester. PIs will receive multiple email reminders regarding this confirmation prior to and during the confirmation period. Please consult the COERA Appointment Contact before effort confirmation begins if you have any changes that need to be made to appointments for you or anyone on your project. During salary confirmation, the COERA Appointment contact will be your primary contact and will send extremely detailed emails with instructions on how to complete the salary confirmation appropriately and timely. Please contact the COERA Appointment contact should you require assistance.

It's important to review this information and project any potential appointments that will change the overall spending pattern of your budget. Please be aware of and discuss possible changes with COERA.