Things to consider when approving as a CA

General Items
- Is the account code set-up and correct?
- Is the item in the budget?
- Are there rebudget restrictions?
- Does the grant have available funds?
- Does the item fall within the dates of the grant?
- Are the charges allowable, allocable, and reasonable?
- Would the PI need to make the purchase if the project didn’t exist?
- Was the item approved by the departmental approver?

Justification
- Is the justification complete?
- Does it clearly state how the item benefits the project?

Purchasing
- Is the item over $10,000? If so, does it have a price comparison form?
- Are the items ordered part of a Fabrication, is the Fab # included in the justification. Have you compared the purchase against the planned “shopping list” for the fabricated item?
- CPS – Is there a statement of work? Is there a bid for $50,000 and over?
- If purchasing equipment, is its usage 100% to project, or is it prorated if benefiting more than one project?

Travel
- Are meal per diems and hotel per diems within the allowable limits?
- Under $25 no receipts required
- Was the person traveling on the grant paid on the grant within the dates of travel?
- If foreign travel, does it meet the Fly America guidelines?
- Is there personal travel combined with business? If so, are there higher costs for airfare? Cost comparisons should be included
- If any travel expenses were prepaid on the Procurement Card, is that information documented on the employee expense reimbursement worksheet?
- Does it benefit more than one project? If so, then the cost of travel should be prorated according to benefit to each project.
- Are there any travel restrictions?

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Cost Transfer

- Is the date and reference of original charge documented?
- Did the original transaction occur over 60 days ago? If so, and it is moving a cost onto a sponsored project, is there verification of PI approval to move the cost?
- Nothing over 12 months can be moved
- If moving insurance onto the grant (training grants), was the student paid on the grant?

RAR Animal Purchases

- Is there a Protocol #?
- Is the Protocol active?
- Is the grant number listed?
- Do the grant numbers match?

Rebudgeting

- Are there any rebudgeting restrictions?
- If needed, was there prior approval from the sponsor?
- Was the F&A adjustment done if rebudgeting between applied and exempt categories?

*created by Tammy Price, Medical School Administration 2014*