

GRANT ADMINISTRATOR ONBOARDING

New Hire Name: Supervisor:

Department College: Start Date:

Task	Expected Outcome	Notes/ Examples	Completed	Date/Initials
System access set up (eRA, finance, HR, email)	Staff can log into all required systems		☐	
Introduction to grant lifecycle (pre-award, award, post-award)	Staff can describe each stage and key handoffs		☐	
Shadow proposal submission and award setup	Staff can explain how a proposal is routed and an award is activated		☐	
Review org chart and institutional research portfolio	Staff can identify key offices and contacts		☐	

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Learn budget basics (direct vs indirect, F&A, cost share)	Staff can prepare a simple compliant budget		☐	
Review sponsor guidelines (NIH, NSF, DOE, foundations)	Staff can identify differences in common sponsor requirements		☐	
Practice internal routing and approvals	Staff can route a proposal through internal systems		☐	
Complete mock proposal exercise	Staff can prepare a full proposal packet for review		☐	

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Interpret a Notice of Award (NOA)	Staff can extract key terms and reporting deadlines		☐	
Set up award in finance system	Staff can establish budget lines and periods		☐	
Review allowability of costs (Uniform Guidance)	Staff can explain allowable vs. unallowable expenses		☐	
Practice subrecipient monitoring steps	Staff can draft monitoring plan and review invoices		☐	
Process a sample rebudget or prior approval	Staff understands sponsor requirements for changes		☐	

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Understand IRB requirements for human subjects	Staff can explain when IRB approval is required		☐	
Complete FCOI training and disclosure exercise	Staff can explain PHS/NIH FCOI rules		☐	
Review effort reporting basics	Staff can describe payroll/effort documentation requirements		☐	
Prepare a mock financial or technical report	Staff can compile sponsor-ready reporting documents		☐	

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Manage a live proposal or award with supervisor review	Staff can independently complete tasks with oversight		☐	
Complete internal audit checklist	Staff can identify gaps and ensure compliance		☐	
Suggest a process improvement opportunity	Staff demonstrates critical thinking and initiative		☐	
Create professional development plan (NCURA/SRAI/CRA goals)			☐	