**Updated 03/2021**

Monitoring Site Visit Guide

QUICK REFERENCE CARD

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| What Should the SPS Post-award Area and the AG Field Office do when notified of a site/monitoring visit or review? |
| * Notify Supervisor and Director of Post Award
* Determine the scope of the visit or review.
* Determine the timing of the visit or review.
* Determine appropriate parties to be involved with the visit or review.
* Schedule a meeting with the appropriate parties (Post-Award, Data & Support, RQA, Business Manager, PI, etc.) to discuss roles and responsibilities.
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| Manager/Administrator Who Manages Award Responsibilities  |
| * Cash/billings
* Financial reporting
* Day-to-day financial management
* Subrecipient assessment/review & recommend payment of Subrecipient invoices
* Collect (and submit) all documentation requested by the Agency contact
* Verify F&A calculation for grants and all sponsored programs
* Collect documentation requested by agency contact person
* Reserve a conference room and parking pass for the Reviewers
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| RQA Coordinator Responsibilities  |
| * University policies, procedures and internal controls
* Financial/payroll transactions
* Assist with collecting financial/payroll transactions support documentation
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| Business Office Responsibilities  |
| * Providing financial/payroll transactions support documentation
* Payroll processes
* Procurement processes
* Travel processes
* Assist in obtaining PI approval/certification of Subrecipient invoices
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| Principal investigator Responsibilities  |
| * Programmatic oversight and reporting
* Subrecipient programmatic oversight, reporting and approval of Subrecipient invoices
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| Useful Links |
| Payroll Services <http://www.purdue.edu/business/payroll/>Travel Procedures <http://www.purdue.edu/business/travel/>Procurement Services <http://www.purdue.edu/business/procurement/>Managerial Accounting Services <http://www.purdue.edu/business/mas/>F & A Rate Agreement – West Lafayette <https://www.purdue.edu/business/sps/pdf/HHS_Indirect_Cost_Rate_Agreement_through_June_2021.pdf>SPS Handbook <http://www.purdue.edu/business/sps/pdf/Purdue_SPS_Handbook.pdf>Subrecipient Monitoring Guidelines and Processes <https://www.purdue.edu/business/sps/RQA/Subrecipient.html>Internal Controls Summary Grid <https://www.purdue.edu/business/sps/pdf/Internal_Controls_Document_External.pdf> |