

Harvard Pilgrim Health Care, Inc.
Harvard Pilgrim Institute
Office of Sponsored Programs

	Grants Manager	RSDC	IRB	PI	PROJECT MANAGERS	OTHERS
<i>A. Grant Applications</i>						
1. Complete Required OSP and DPM Training	X	X	X	X	X	All Others
2. Notify OSP & RSDC of plan to submit grant 60 days before due day				X	X	
3. Submit Conflict of Interest Disclosure in Click Commerce				X	X*	*Anyone responsible for design, conduct, and reporting
4. Prepare 1st three sections of SPA grant application				X	X	
5. Provide information & guidance	X	X	X	X		RICO/DOSP
6. Review application for consistency w/ sponsor requirements & obtain institutional sign-off				X	X	
7. Submit electronic application	X					
8. Maintain pending grants database & physical documents	X					
<i>B. IRB Process</i>						
1. Prepare IRB New Study Application				X	X	
2. Provide information, guidance, and signatures	X	X	X	X		RICO
3. Submit IRB application in IRBNet				X	X	
4. Review application in IRBNet			X			
5. IRB Review and determination			X			
6. Ongoing Communications/Submissions of Amendments, Continuing Reviews, Reportable Events			X	X	X	RICO
<i>C. Grant Award</i>						

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1. Receive notice of grant award/non-award	X			X	X	
2. Negotiate/review terms w/sponsor	X					
3. Informational meeting to discuss award/project setup & salary plan (use grant kick off template)	X			X	X	
4. Set up award/project/budget in GMS	X					
5. Prepare Account Information Sheet for award & distribute	X					
6. Prepare and negotiate subcontracts & assure activation	X					
7. Daily management of projects/awards				X	X	
<i>D. Project Management</i>						
1. Develop & track timelines/work plans				X	X	
2. Hire & supervise study staff				X	X	
3. Coordinate project team activities				X	X	
4. Track progress of project(s)				X	X	
5. Communicate with project team				X	X	
<i>E. HPHC Purchasing/Invoice Payment</i>						
1. Perform pre-purchase review of sources, discounts, taxes, etc.					X	
2. Requisition form submitted to requisition coord to obtain PO				X	X	
3. Authorizes purchase after review of institutional & grant guidelines for purchase	X					
4. PO generated for subcontract invoices, copy sent to original requestor (invoices)						Associate Grant Coordinator

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5. PO generated for DPM and all other grant expenses, copy sent to original requestor (invoices)						Associate Finance Coordinator
6. Receive goods/services				X	X	
7. Verify/research service delivery				X	X	Associate Grant Coordinator or Associate Finance Coordinator
<i>F. HPHC Subcontract Payments</i>						
1. Initiates requisition for subcontract payment	X					
2. Receive invoices from subcontractors	X					
3. Verify invoice/subcontract payment	X			X	X	
<i>G. Billing & Accounts Receivable/Purchasing</i>						
1. Prepare monthly invoice to sponsor	X					
2. Receive notification of payment; instruct AR how to apply payment	X					
3. Monitor collections of funds from sponsors/contractors & pursue overdue collections	X					
<i>H. Salary Planning</i>						
1. Create award labor budgets				X	X	
1.1 Grant funds (see B7)				X	X	
1.2 Department funds						Financial Mgr
2. Formulate individual labor schedules				X		
<i>I. Financial</i>						
1. Generate monthly reports for PI's and their designees	X					CO-I's if needed
2. Reconcile departmental accounts monthly						Financial Mgr
3. Reconcile grants accounts monthly	X			X	X	

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4. Research discrepancies & process corrections to institutional system, within 60 days of charges occurring	X			X	X	
<i>J. Reporting & Financial Analysis</i>						
1. Generate grant/other account available balance report at least monthly	X					
2. Generate PI/Project/group level reports	X					
3. Grant forecasting				X	X	
4. Provide internal reports to HSC & other reports as required				X	X	
5. Provide annual technical report to funder as required				X	X	
6. Provide annual financial report to funder as required	X			X	X	
7. Prepare, distribute and file certifications of time and effort reports	X					
8. Coordinate A133 Audit	X					HPHC Finance Offices
9. Submit documents for indirect cost rates	X					HPHC Finance Offices
<i>K. Account Closing (GRANTS)</i>						
1. File final financial status report	X					
2. File final technical reports to funders as required				X	X	
3. Remedy any account balance issues	X			X	X	
<i>L. System Administration (for GMS)</i>						

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1. Coordinate development and implantation of system enhancements	X					Inst. Admin
2. Serve as primary liaison with HPHC for problem resolution & technical issues	X					Inst. Admin
3. Prepare and maintain local documentation	X					
4. Set up new user security profile						HPHC IT
5. Provide user training	X					HPHC IT
<i>M. Information sharing, training, policy and other assurances</i>						
1. Monitor, interpret, communicate polices/regulations as needed	X		X	X		RICO
2. Develop HPHC research administration policies, procedures and assure compliance	X		X			Dept Chair, RICO
3. Represent needs of HPHCI to HPHC and HMS	X			X		Dept Chair, RICO
4. Provide training to the research community and sponsors to resolve issues	X		X			Dept Chair, RICO
5. Represent interests of research community and sponsors to resolve issues as needed	X			X		Dept Chair, RICO
6. Monitoring subrecipients adherence to sponsors policies and procedures as needed	X			X	X	