ONBOARDING GUIDE

Date: _____ Project Director Name: _____

The intended use of the Onboarding Guide is to provide project staff guidance on procedural guidelines for all grant activities at Amarillo College within the first 90 days of hire. The guidance provided in this document may vary based upon actual guidelines of the proposal related to the grant. We recommend that this guide be used in conjunction with other training opportunities and mentoring to become familiar with grant specific practices.

KEY ELEMENTS AND OBJECTIVES OF QUICKSTART

- ✓ Introduction to basic functions, systems and processes of Grants Accounting and Administration at Amarillo College
- ✓ Introduction to basic compliance rules
- ✓ Introduction to the grants administration handbook and grants accounting general ledger standards providing basic functional skills to be performed

GENERAL ONBOARDING TIPS

1. Identify project deliverables and grant requirements of the granting agency.
2. Review Amarillo College's purchasing, travel, and conflict of interest policies and procedures.
3. Review Employee Time and Effort Reporting Form and payroll distribution.
4. Review Amarillo College's general ledger format.

RESPONSIBLITIES IN GRANT MANAGEMENT

The Project/Program Director:

- ❑ **Perform** the grant within the guidelines of the proposal and follow the regulations related to the grant.
- ❑ **Submit** written reports in accordance with the guidelines of the granting agency.
- ❑ **Determine** that bills submitted for payment fall within the guidelines of the budget.
- ❑ **Follow** Amarillo College policies and procedures in completion of the grant.

Grants Administration Coordinator:

- ❑ **Ensure** reports submitted to the granting agency have appropriate information.
- ❑ **Determine** that expenditures fall within established grant budget and guidelines.
- ❑ **Maintain** a calendar of grant reporting dates and prompt departments for action on grants.
- ❑ **Monitor** and **review** grant documentation for adequacy of records and compliance with agency guidelines.

- ❑ **Review** time and effort reporting forms

Grants Accounting Office:

- ❑ **Request** funds from Granting Agency.
- ❑ **Complete** quarterly/annual financial reports.
- ❑ **Submit** invoices to granting agency
- ❑ **Review** request for new accounts and establishment of grant budget in Financial Records System.
- ❑ **Determine** that bills submitted for payment have appropriate documentation.
- ❑ **Monitor** and reconcile expenses against Financial Records System and the grant budget.
- ❑ **Ensure** policies are followed in the payment of goods and services.

Recommended Reference Documents	
you should...	❑ **Complete** all **Colleague U15 training** ❑ **Read** Amarillo College travel and procedures https://www.actx.edu/forms/travel-policies-and-procedures ❑ **Read** Amarillo College Grants Administration Handbook. ❑ **Review** and reference general ledger codes and standards ❑ **Review** time and effort management requirements ❑ **Contact** Kimberly Carlile for purchasing procedures and procurement card guidelines k0153833@actx.edu
you should...	❑ **Complete** all grant agency training requirements ❑ **Review** and reference **Project Obligations** ❑ **Review** and reference **Closeout Document Submission Process**