

# NEW AWARD GRANT INTAKE

Tracking #:

Grants Office Use Only



Important: Intake meetings are generally for all new awarded grants and/or contract that aren't of a recurring nature with the same funding agency.

Intake meetings should be scheduled by program staff with the Grants & Contracts office. This meeting should include the responsible Program Manager or Director and their staff responsible for managing the project and the assigned Accountant to review the terms and conditions of the award and to ensure all parties will operate with a common understanding.

Grant/Project Name: \_\_\_\_\_ CFDA/ALN #: \_\_\_\_\_

Award #: \_\_\_\_\_ Project Period: \_\_\_\_\_ to \_\_\_\_\_

Funding Agency: \_\_\_\_\_ Awarded Amount: \$ \_\_\_\_\_

### Contact Information:

- Awarding Official Contact: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Email: \_\_\_\_\_
- Project Coordinator: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Email: \_\_\_\_\_
- Grant Accountant: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

### Pre-Meeting Requirements (Please complete prior to intake meeting day):

1. Read the entire grant award letter Yes \_\_\_ No \_\_\_ Note: \_\_\_\_\_
2. Read special conditions/terms & conditions Yes \_\_\_ No \_\_\_ Note: \_\_\_\_\_
3. Reviewed/Acknowledged/Printed any reference material Yes \_\_\_ No \_\_\_ Note: \_\_\_\_\_  
(i.e. Financial Management Guide, Uniform Administration Guidance, etc.)
4. Are there any special or compliance requirements? Yes \_\_\_ No \_\_\_ Note: \_\_\_\_\_

### Items Needed for Accounting File:

- Signed Award Document Date Processed or Subcommittee Date: \_\_\_\_\_
- Tribal Authorizing Resolution: NP \_\_\_\_\_ - \_\_\_\_\_ Date Processed or Subcommittee Date: \_\_\_\_\_
- Tribal Budget/Awarded Budget Date Processed or Subcommittee Date: \_\_\_\_\_
- Grant Proposal Documents
- Fund # assigned: \_\_\_\_\_

Questions or Comments: \_\_\_\_\_

\_\_\_\_\_  
Project Coordinator Date

\_\_\_\_\_  
Grant Management Staff Date

\_\_\_\_\_  
Grant Accountant Date

\_\_\_\_\_  
Grant Management Staff Date