

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 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 the Grants office 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 Date

Grant Accountant Date