If your grant is funded, you will need an accounting unit (AU) to pay study-related expenses.

Upon receiving a notice of award from the sponsor, please follow these steps to request an AU:

<table>
<thead>
<tr>
<th>STEP</th>
<th>Description</th>
<th>Where to Find It</th>
<th>Contacts</th>
</tr>
</thead>
</table>
| 1.   | Collect the following items and bring/send them to Sue Meyer Pugl of the Office of Research Services (ORS):  
- LU Number of the Routing Form  
  - Make certain the routing form has been approved by both the PI and the Department Chair.  
- Notice of Award  
  - The sponsor will provide you with written notice of their funding your project.  
- Budget  
  - Include a copy of the project's approved budget.  
- Payment  
  - The invoicing and payment for most grants from major sponsors are handled entirely by Sponsored Program Accounting (SPA), so it is likely you will not need to collect the funds; however, some sponsors will send payment directly to you. If this occurs, please make certain checks are made payable to "Loyola University Chicago" and include the check with your setup package. | Information Portal > Research Channel | Sue Pugl (ORS) x68537 |
| 2.   | ORS will check that your paperwork has the requisite approvals (IRB, IACUC, MCA, etc.), mark the award as received, and forward the setup package to Juana Arauz in HSD Finance. | | Sue Pugl (ORS) x68537 |
| 3.   | HSD Finance will open the postaward budgeting mechanism within your routing form. | | Juana Arauz (HSD Finance) x68537 |
| 4.   | You must go into the Routing Form and enter the postaward budget data. | Information Portal > Research Channel  
> Routing Form  
> Edit Budget for Year 1 | Department/Grant Administrator  
or Sue Pugl (ORS) x68537 |
| 5.   | HSD Finance will approve the postaward budget you have entered and forward your setup package to SPA with a request for a new AU. | | Juana Arauz (HSD Finance) x68537 |
| 6.   | SPA will establish a new AU and send an email to the PI and the Department (or Grant) Administrator alerting them of the new AU. | | Your SPA Representative |
| 7.   | There will be 2 attachments to the new AU email that need to be completed and sent back to SPA:  
  1. Security Access Form. On this form, list the personnel to whom you want to grant access to the project’s financial data.  
  2. Signature Form. On this form, indicate who should have signature authority to approve expenditures.  
  - For both forms, generally, PIs will list themselves, their Department and/or Grant Administrators, and their research support staff. | | Department/Grant Administrator |
| 8.   | Process any necessary payroll forms and begin using your new AU. | | |