



are responsible for submitting the PA forms, please let the other departments know who a PA form is needed for.

Personnel and compensation paid can only be hired through University established procedures. [UT Human Resources and Talent Development website](#) contains additional information related to employment, hiring authority and PA forms. Please review the [Ohio Ethics Laws](#), the policy on [Nepotism](#) (hiring family members) and [Post Employment Restrictions](#), preventing situations which give the appearance of partiality, preferential treatment, improper influence, conflict of interest, and is in accordance with state law.

4. Effort Certification is required for all Grant awards at the University of Toledo. You will receive automatic emails from grants accounting to notify you when the effort period is open for certification and action is required. You may refer to the Grants Accounting website for additional information on the [online effort certification](#), training and videos.
5. In order to be in compliance with The University of Toledo Conflict of interest policy for sponsored programs (Policy Number: 3364- 70-01) any individual employed or working on this project will need to complete a Financial Conflict of Interest Disclosure (FCOI) form.

\*Note: Most state grants follow the [State of Ohio OMB Travel Rule](#) which is less than the federal policy.

- ii) If any purchase exceeds \$5,000, a purchase order is needed per University policy. Please click [here](#) to access the links to the forms required to setup Banner/Lawson requestors/approvers. Once this step has been completed, requisitions can then be initiated for the index.
    - (1) Equipment usually requires agency approval and must be provided through purchasing.
    - (2) \*Do NOT dispose or remove from the University without seeking prior approval from Grants Accounting and Asset management first.
  - iii) If you are hiring an Independent Contractor or Consultant as a part of this award, please refer to the Independent Contractor procedures included in the following link: [http://www.utoledo.edu/offices/controller/grants\\_accounting/forms.html](http://www.utoledo.edu/offices/controller/grants_accounting/forms.html) . Please note that a commitment should not be made to a potential Independent Contractors/Consultant until internal procedures have been completed to determine status, and Personal Services Agreement is obtained if needed.
    - 1. If you are utilizing the services an Individual for consulting services, please complete and submit the appropriate forms to Human Resources. The forms must be completed and approved prior to making any commitment to a Consultant or Independent Contractor.
    - 2. If you are utilizing the services of a Company for consulting services, please work with Purchasing to secure the appropriate Services Agreement. The agreement must be secured prior to making any commitment to a Consultant or Independent Contractor.
  - iv) If you are purchasing gift cards, please refer to the Accounts Payable Forms site, as the [Authorization/Request for the Purchase of Gift Cards/Gift Certificates form](#) needs to be signed PRIOR to the purchase of gift cards. It is also the departments responsibility to keep a gift card log.
7. Please visit <https://mysp.utoledo.edu/> and utilize your UTAD login and password to review your account status including budget vs. expenditures reports, expense detail and labor detail. Please utilize Mysp to monitor all grant expenses and advise your grants analyst ASAP if an error is detected, so that it can be corrected in a timely manner. Requests to move expenses more than 90 days may need additional forms completed to process the request. Your analyst will be happy to help you navigate through the website. If you need access to Mysp, please send an email, including your UTAD ID to: [grantsaccounting@utoledo.edu](mailto:grantsaccounting@utoledo.edu) .