Faculty Guide on Best Practices in Reporting

Introduction

Effective reporting is crucial for the successful management of sponsored research projects. This guide outlines best practices to ensure compliance, accuracy, and efficiency in reporting.

Key Concepts

1. **Compliance**: Adhering to federal, state, and institutional regulations.
2. **Accuracy**: Ensuring all reported data is correct and verifiable.
3. **Timeliness**: Submitting reports within the required deadlines.

Best Practices

1. **Understand Award Terms and Conditions**:
   o Carefully review the award document to understand the reporting requirements, billing and payment terms, and deadlines.
   o Familiarize yourself with the specific terms related to your award, such as cost-sharing commitments and allowable expenses.
2. **Maintain Accurate Records**:
   o Keep detailed and organized records of all project-related activities and expenditures.
   o Use institutional tools like WCU's InfoEd Grant Management Software to track and manage your award information.
3. **Regular Financial Reviews**:
   o Conduct monthly reviews of financial reports to ensure expenditures align with the project budget.
   o Work closely with your grant specialist to address any discrepancies or encumbrances.
4. **Timely Submission of Reports**:
   o Submit all required reports, including financial, progress, and final reports, by the specified deadlines.
   o Utilize the Shared Services Center for assistance with report preparation and submission.
5. **Communication and Collaboration**:
   o Maintain open communication with your research administration team and the Office of Research Administration.

- o Attend training sessions and workshops offered by the Office of Sponsored Research to stay updated on best practices and regulatory changes.

6. **No-Cost Extensions**:
   - o Manage your project with the expectation that the period of performance will not be extended.
   - o If a no-cost extension is necessary, submit the request well in advance of the project end date.

Responsibilities

- **Co-PIs and Staff**: Ensure accurate and timely reporting of all project-related activities to the PI.
- **Principal Investigators (PIs)**: Oversee the reporting process and ensure compliance with all award terms.
- **Office of Research Administration (OSA)**: Provide guidance, support, and resources to facilitate effective reporting. In specific instances, ORA will submit financial reports on behalf of the PI.

Resources

For further assistance, please contact the Office of Research Administration

researchadministration@wcu.edu