Project Director: _____ Project number: _____

CHECKLIST FOR REVIEW OF PROJECT INITIATION FORMS: Formula Funds

1. Make sure that the proper funding source is identified. If not, copy out the PDF into a WORD file, delete the forms, start a new set of forms with the proper funding source, and instruct the PI to enter the system and re-do the forms, supplying him/her with the WORD file for their convenience.
2. Print out the PDF of the project initiation forms to review the following elements:
    a. Enter an appropriate project number
    b. Make sure that the dates are correct
        i. Start date should be after submission date. For project with proposals, all 25-30 days for project review. For multistate project, can allow fewer days for project review. Also, if the project is replacing a current project that is coming due, make sure that the start date for the new project immediately follows the end date for the old project (avoid project overlap)
        ii. End dates: multistate project end dates should correspond to the project length (should be entered automatically by the system, but sometimes PI's think that they should change this date. Make sure that project end date corresponds to the intended end date, as documented in the proposal.
    c. Text is accurately entered, check for spelling/grammar errors, does the text make sense, etc.?
    d. For multistate projects, make sure that the objectives indicated under "Objectives" correspond to the objectives specified by the project director in his/her Appendix E in NIMSS
    e. Appropriate classification categories are used.
    f. Is the project properly identified as integrated research?
    g. Is there an animal health component identified? Should this be indicated?
3. Check/Enter effort (over duration of the project) in the Participation page. This can be taken from the project proposal or from the information entered by the project director in NIMSS (for multistate projects). If project director appears to indicate only one year of effort, scale up for the duration of the project.
4. Are keywords entered properly (one line for each keyword)?
5. Check to see if the project proposal is attached, that it is a PDF file, and that it is the correct approved project. Attach if needed. Make sure that we have a copy of the project proposal for the project file.
6. Is the research (as per the proposal and other information) using human or vertebrate animal subjects? Or recombinant DNA? If so, is this reflected in the Assurance Statement?
7. Assurance Statement Checks:
    a. Check to make sure that Assurance statement inputs correspond with our project records and to the project proposal itself.
    **b. <u>Make sure that we have copies of all relevant protocol approvals.</u>**
    c. Make sure that the Federal wide Assurance numbers for Rutgers are entered for Human and Animal subjects (instead of the PI's protocol number).
        i. For human subjects: FWA00003913
        ii. For vertebrate animal subjects: A-3262-01