

New Faculty Checklist

To add new faculty to your portfolio, we recommend utilizing the New Faculty Checklist for RAs. Please print out and refer to this document to ensure a smooth process¹

- Assure all the PIs you're responsible for, and confirm all their funds in their portfolio
- Gather Information from Faculty re: their lab personnel (existing and what is projected) and other spending trends to forecast
- Follow Departments SOPs on electronics documents (e.g., Pre-Award folder, Post award folder etc.)
- Add/Update Project Chartstrings/Tasks as needed
- Update PI and/or RA Roles (PPM and/or GL projects/tasks)
- Follow Department SOPs regarding projection of personnel and other expenses
- Set up a schedule of Progress reports (Science & Financial), FERs, billings etc.
- Close monitoring of the last year of the reward, prepare 12 months in advance due to personnel and potential union contracts (e.g., layoffs, severance, vacation payouts etc...) planning for close out to \$0.00

Additional Considerations

The specific responsibilities associated with these duties may vary depending on the department's organizational structure and how tasks are delegated among team members.

After acceptance of UC San Diego offer & determination of their start date:

- New Faculty-Start up letter details affecting financial portfolio
- Virtual introduction to sponsored research mgr/POC
- Relocation/move to SD (to be handled a few months before they're appointed (procurement/travel/moving company/exception letter for move needed for travel; house hunting)
- Extramural project transfers to UCSD (where applicable); work with PI, PI's outgoing institution, OCGA and Funding Agency
- UCSD Accesses prior to start date, if needed as affiliate (Oracle, UCPATH, BAH.UCSD reports)

After arrival to campus:

- Meet with staff to introduce business process (fiscal & instructional needs)
- Confirm any training needed for Oracle, Concur (travel/reimbursements), Procurement, Compliance
- Procurement training, such as OFC Purchasing, PCard
- Procurement needs to set up the lab
- Obtain P-Card and Travel card (per faculty request)
- Office needs: lab/office phone/copy machine - confirm chartstrings
- Providing a list of the PI's chartstrings for PI and lab members to use

Tip: If the faculty member has a spouse in the same department consider RA assignment(s)