

Grant Compliance Required Documentation Matrix

	Purchasing Equipment	Purchasing Materials	Purchasing Service (w/o Students)	Purchasing Service (w/ Students)	Professional Development	Extra Curricular Activities	Professional Conferences	PI Meetings w/ Snacks	PI Mailings	PI Materials
Grant Budget Amendment (if applicable)	Any expenditure that differs from a school's Federal Budget Addendum in SMS requires an edit assuming it's consistent with the Schoolwide Plan. For central offices, a grant budget amendment may be required									
Grant Quotation Form	✓	✓	✓	✓				✓	✓	✓
	Only required for goods NOT on a master contract		Also required for micro-purchases to document "necessary" and "reasonable"					Only required for goods NOT on a master contract. Also required for service micro-purchases		
LCA (Insurance, Budget Breakdown, Clearances, supporting documentation)				✓						
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Meal Request Form								✓		
PD/EC Request Form					✓	✓				
PD/EC Faculty Sign-in Sheet					✓	✓				
PD/EC Student Sign-in Sheet						✓				
PD1/RX1/PG1 Advantage Document	✓	✓								✓
RQI Advantage Document									✓	
SC Advantage Document			✓	✓				✓		
SEH-324					✓	✓				
SEH-194							✓			
SEH-195							✓	✓		
SRC Resolution (IF LCA threshold is exceeded)			✓	✓						
Technology Override (if applicable)	✓	✓								
Turn Around Plan							✓			
Supporting Documentation			✓	✓	✓		✓	✓	✓	
Distribution Plan										✓

Reminder: after grant overrides have been applied in Advantage Financial for goods/services, it is the responsibility of the administrator to apply their second level approval to all advantage documents to ensure purchase orders are processed in a timely manner. Consult with your Grants Compliance Monitor regarding any questions or concerns. 8/4/16.