

Non-Financial Milestones

I. PURPOSE

This procedure sets forth appropriate and relevant guidelines for monitoring the non-financial milestones on sponsored projects.

II. SCOPE

This procedure applies to all areas responsible for the administration of a sponsored project.

III. RELATED STATUTES, POLICIES, REQUIREMENTS OR STANDARDS

A. [HOP 10.12, Sponsored Programs Administration](#)

IV. DEFINITIONS

A. Non-Financial Milestone

1. A non-financial deliverable due to the sponsor per the terms and conditions of the sponsored project (e.g. progress report, inventory report, invention report, etc.)
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V. RESPONSIBILITIES

A. Principal Investigator (PI)

1. Completes and submits all technical reports.
2. Works with RA Team to ensure all non-technical reports are submitted.

B. Research Administration Team (RA Team)

1. Monitors completion of non-financial milestones during the life of an award.
2. Marks all non-financial milestones submitted by the PI as completed in PeopleSoft.
3. Assists PI with completion of non-technical reports (e.g. inventory report, invention report, etc.)

C. Office of Sponsored Projects (OSP)

1. Creates non-financial milestones in PeopleSoft during award set up.
2. Marks all non-financial milestones submitted by an AOR as completed in PeopleSoft.
3. Verifies all non-financial milestones are completed during award close-out.

VI. PROCEDURES

The following procedures pertain to monitoring the non-financial milestones on sponsored projects.

1. The RA Team can use the query below to identify uncompleted non-financial milestones and upcoming non-financial milestones due monthly.
 - a. UTS_OSPA_GMAWARD_MILESTONES
2. For uncompleted non-financial milestones, the RA Team will follow up with the PI to confirm milestones have been completed and mark the non-financial milestone as Completed in PeopleSoft.
3. For technical reports, the RA Team will obtain a copy of the report from the PI and save it in the award file.
4. For upcoming non-financial milestones requiring submission by an AOR, the RA Team will coordinate the submission with the assigned Grant & Contract Administrator (GCA).
 - a. Upon submission, the GCA will mark the non-financial milestone as Completed in PeopleSoft and save a copy of the report in the award file.

VII. PROCEDURE OWNER

Office of Sponsored Projects (OSP)

VIII. VERSION AND DATES

Version 1 June 2024