Baruch Grant Development & Management Navigator

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Find funding, route your proposal, manage your award in OneRF, and complete sponsor closeout.

Explore the lifecycle Find a resource

Quick links

SPAR · RFCUNY · Cayuse · OneRF

Cayuse and OneRF require authorized sign-in.

Grant lifecycle

- 01 · Find funding. Check sponsor fit, eligibility, and required approvals before committing to an application.
- 02 · Develop & submit. Prepare the budget and approvals, then route the complete package through SPAR.
- 03 · Set up & manage. Activate the award, confirm OneRF access, and keep spending and reporting on track.
- 04 · Close out. Reconcile final expenses, complete sponsor reports, and archive the award record.

A deadline to build around

Baruch SPAR requires the final proposal and all School approvals at least **five full business days** before the sponsor deadline. Read the SPAR submission policy.

Who handles what?

See how the principal investigator, SPAR, and RFCUNY coordinate at each phase. View the responsibilities chart.

Working in OneRF?

Find steps for grant access, reporting, procurement, reimbursements, hiring, time and leave, and faculty effort. Open the OneRF workflows.

01 · Find funding

Confirm sponsor fit and feasibility before developing the application.

Build a shortlist

1. Write a short project abstract that names the problem, audience, approach, expected outcomes, and team. Bring it to a kickoff meeting with the Office of Sponsored Programs and Research (SPAR).
2. Search Pivot or GrantForward for funding across sponsors, and Grants.gov for U.S. federal opportunities. Check Baruch and CUNY internal competitions for seed funding and pilot projects.
3. Save the official funding announcement and amendments. Record the deadline with time zone, eligibility, award size and period, and the sponsor contact.
4. Compare your project with the sponsor's scope, review criteria, expected outputs, and available funding. Confirm your eligibility to serve as principal investigator (PI) and whether the institution faces a submission limit.

SPAR Getting Started · External Funding · Internal Funding

Check feasibility with SPAR

Bring the announcement, abstract, target deadline, collaborator list, and initial staffing and cost assumptions. Ask about the fiscal agent, required sponsor registrations, institutional commitments, matching funds, and subawards. Flag human-subjects research, conflicts of interest, or other compliance requirements early and confirm when each clearance is needed.

Ready to proceed when you have an eligible opportunity, a workable scope and budget range, and a routing timeline that SPAR can support.

Baruch research development and compliance resources · Develop & submit

02 · Develop & submit

Build the application and route it through Baruch SPAR.

Work backward from submission

Send SPAR the sponsor announcement and submission details early. Confirm who will submit, which organization will apply, whether the sponsor uses a portal, and when SPAR needs drafts. Work with the lead institution to establish the due date if Baruch is a proposed subrecipient.

> **!** Baruch internal deadline
>
> SPAR must receive the final package and required School approvals at least **five full business days** before the sponsor's deadline. Confirm the internal date with SPAR.

Official Grant Proposal Submission Policy (PDF)

Develop scope and budget together

1. Translate the sponsor's review criteria into the project narrative, timeline, milestones, and evaluation plan.
2. Build the budget by year. Use SPAR-confirmed salary, fringe, and indirect-cost assumptions appropriate to the application. Map each item to an activity, explain calculation bases in the justification, and document any institutional commitments.
3. Gather attachments such as biosketches, letters, data management plans, or subrecipient scope and budget materials as required. Ask SPAR for the correct institutional identifiers and verify who can sign.
4. Review sponsor formatting, page limits, attachment names, and portal validation before internal routing.

SPAR Budget Guidance · Institutional Information

Route and confirm

Send the signed Internal Approval Cover Sheet, required compliance materials, announcement link, final technical components, and final budget plus justification to SPAR. Arrange chair and dean signatures through the campus process. Address any review questions with SPAR and save the final submitted package, receipt, and any sponsor tracking identifier.

Proposal Preparation and Submission · SPAR Forms · Set up & manage

03 · Set up & manage

Move from award notice to active project operations.

Start the award

1. Send the award notice, terms, and approved scope and budget to SPAR. Confirm the fiscal agent and campus and RFCUNY contacts. Ask how any unsigned agreement or award condition will be resolved.
2. Record the performance and budget periods, award restrictions, deliverables, required approvals, and reporting dates. Confirm the approved budget and commitments such as effort, cost share, and subawards.
3. For an RFCUNY-managed award, confirm the grant is set up and available in OneRF. Check grant identifiers, dates, budget lines, and role access before creating charges. Ask SPAR about the formal forward funding process if spending is needed before setup.
4. Assign owners for purchases, payroll, effort certification, subrecipient monitoring, and reports. Save the governing award documents and approval records in an appropriate project location.

SPAR Post-award Administration · SPAR Forward Funding · RFCUNY Manage an Award

Run a monthly review

- Run the OneRF grant budget report and compare posted charges, obligations, and available balances with project records and planned costs.
- Review labor allocations, hiring and payroll activity, outstanding receipts, expense reports, subaward invoices, and cost-sharing commitments where applicable.
- Compare actual progress with deliverables and report dates. Review subrecipient invoices against the work performed and follow up on missing reports or supporting records.
- Bring discrepancies to your RFCUNY project administrator with the grant ID, transaction reference, and supporting documentation. Track each issue through resolution.

Route changes before implementing them

Consult SPAR and your RFCUNY project administrator for rebudgeting, changes in scope or key personnel, additional funds, or extensions. Supply the rationale, affected budget and dates, and any sponsor-required documentation. Confirm who requests sponsor approval and retain written authorization when required.

RFCUNY System Access and Grant Role Assignments · Subaward Guidance · OneRF workflows · Close out

04 · Close out

Finish the work, reconcile the award, and preserve the submission record.

Before the project ends

1. Use the award terms to identify the end date and each sponsor deadline. Confirm earlier campus and RFCUNY processing cutoffs with SPAR and the RFCUNY project administrator.
2. List open purchase orders, receipts, payroll obligations, reimbursements, subaward deliverables and invoices, cost share, and any remaining effort certification.
3. Confirm staffing and appointment end dates, final deliverable owners, and required property or intellectual-property reporting.
4. If work will exceed the project period, consult SPAR early about whether and how to request a no-cost extension. Track the written decision and use the confirmed dates.

Reconcile and report

- Run the OneRF budget review and reconcile final personnel expenses and other-than-personnel-services (OTPS) costs. Resolve missing, incorrect, and open items with your project administrator before the financial report is filed.
- Review and document final subrecipient invoices and deliverables. Confirm required cost-share evidence and any property or inventions reporting with SPAR and RFCUNY.
- Complete the final technical or programmatic report as PI. Coordinate with the project administrator, who prepares the RFCUNY final financial report, and confirm whether the sponsor expects coordinated submissions.
- Retain the award and amendments, final reports and receipts, financial reconciliations, approvals, and relevant supporting records. Confirm applicable retention requirements and archive access with SPAR or RFCUNY.

Closeout record should show which reports were submitted, who submitted them, when the sponsor received them, and where supporting records live.

RFCUNY Closing Out an Award · Closeout FAQs · Resource directory

OneRF workflows

Task sequences for principal investigators and authorized grant staff using RFCUNY's Workday and Jaggaer platform.

> **Before you begin**
>
> Have the correct grant ID, award dates, assigned role, and source documents on hand. Routing depends on your role and transaction. For screen-level instructions, use RFCUNY's Training Resources (sign-in required), public training recordings, and role access matrix (PDF).

Access and grant roles

1. Open OneRF using your OneRF credentials. Ask SPAR to confirm the grant identifier and your expected assignment if this is a new project.
2. Confirm which access you need. The PI is responsible for programmatic and fiscal stewardship. An authorized signatory or timekeeper can review certain assigned tasks. A preparer works on eligible human-capital transactions. A report viewer can access assigned reports.
3. For a new OneRF account, contact RFCUNY's Grant Access Team by email or submit a OneRF Help case through someone with access. Provide the information requested by the official access instructions. Request grant-level role assignment with the appropriate grants office or PI authorization.
4. Check that your grant, tasks and reports appear. If an item is missing, confirm the exact grant and role with SPAR or the Grant Access Team. Tell them when access is no longer needed.

RFCUNY grant roles and account requests · OneRF general FAQ

Budget monitoring

1. Open your PI or Grants Officer report dashboard and run **RFCUNY Grant Budget & Expense Report** for the grant and relevant period.
2. Review budget, obligations, and actuals for personnel and OTPS. Drill into Actual amounts to identify underlying entries. Compare with pending commitments and local records before making new spending decisions.
3. For an unexpected charge, capture the report date, grant ID, transaction or journal reference, amount, and explanation. Ask the RFCUNY project administrator about the appropriate correction or cost-transfer process.
4. Rerun the report after resolution. Repeat the review monthly and before preparing closeout.

OneRF Report Dashboard · Grants and Reporting FAQ

Purchases, receipts and invoices

1. Verify the budget, allowability, supplier, and required documentation. Capture quotes or justifications as required and consult procurement for unusual purchases.
2. **Catalog:** search **Connect to Supplier Website** and select **Connect** to shop in Jaggaer. **Non-catalog:** search **Request Non-Catalog Items**, describe the goods or services, and attach supporting documents. If the supplier is absent, initiate the supplier request in the supported workflow.
3. Review the requisition's grant worktag, spend category, amounts, and delivery details. Submit and monitor it through required approvals and sourcing. Use **My Requisitions** to track the request.
4. When goods or services are received, record the actual quantity or service received using the receipt function against the purchase order. For partial delivery, receipt the portion received. Catalog suppliers invoice in Jaggaer. Non-catalog suppliers follow RFCUNY's invoice submission instructions.
5. If payment stalls, check OneRF notifications, the requisition and receipt reports, and ask Procurement & Payables about any mismatch or missing action. Include the PO and receipt references.

RFCUNY Procurement FAQ

Travel, reimbursements and P-Cards

1. Confirm sponsor and RFCUNY travel rules and any applicable preapproval before committing funds. Where required, submit a **Spend Authorization** with the purpose, dates, estimates, grant and attachments, then monitor approval.
2. For reimbursement, create an **Expense Report** and reference the approved authorization when applicable. Enter actual expenses by item with dates, business purpose, grant worktag, and supporting documentation. Follow RFCUNY's travel reimbursement documentation and submission timeline.
3. For a P-Card purchase, use the P-Card reconciliation expense report workflow. Select the card transactions, code and document each charge, and submit the report. Review whether each expense was charged to the card or paid personally so it is accounted for once.

4. Follow progress in **My Expense Reports** and **My Spend Authorizations**. Respond to returned items and track the report until it is processed.

Travel Reimbursement · P-Cards and Expenses FAQ

Hiring and appointment changes

1. Confirm position type, classification, compensation, schedule, start and end dates, funding, and required approvals with campus staff and RFCUNY HR.
2. Use **Create a Position** when a position is needed and **Create a Job Requisition** for recruitment. Enter position and funding information, submit, and track approvals before moving forward.
3. After selection, use the applicable hire or rehire process. Follow the onboarding checklist and confirm employment eligibility and required HR approvals. Ask HR to confirm readiness before the person begins work.
4. Confirm the schedule and costing allocation. For appointment extensions, start the **Change Job** process early. Check **Worker History** for pending approval steps, since incomplete routing can block timesheet submission.

Hiring and Human Capital Management FAQ · Recruiting and Rehiring

Timesheets and leave

1. Confirm each worker's schedule. Set the schedule in OneRF for part-time workers and full-time workers who depart from the preset schedule, as applicable.
2. Employees enter time for the correct pay period, check hours and entries, and submit by the RFCUNY payroll deadline. Employees request time off using the **Absence Calendar**.
3. The assigned approver reviews time and applicable leave for positions they manage, checks completeness, and approves or returns entries for correction. Approved time off flows to the timesheet.
4. Check for missing or pending timesheets before payroll closes. If time entry is blocked, check the appointment dates, approvals, and schedule, then contact RFCUNY payroll or HR as appropriate.

Payroll, Timesheets and Leave FAQ

Faculty effort certification

1. With SPAR, confirm which faculty, grants, and reporting periods require certification. For reassigned time, coordinate the Staff Effort Notice with SPAR and the RFCUNY project administrator.
2. At period end, review the official after-the-fact effort record against actual activities, salary distributions, and committed cost share. Confirm the faculty member's total effort across activities.
3. Resolve discrepancies with SPAR or RFCUNY before certifying. Use the effort certification process RFCUNY identifies for the award and reporting period. Confirm your authorized certifier role and task access before the due date.
4. Retain evidence of certification and any approved corrections with the award records.

RFCUNY Effort Certification Policy · Processing Staff Effort

Get help with a transaction

Check the transaction and OneRF notifications for the action or approver holding it up. If the issue is unresolved, open a Help case and include your role, grant ID, transaction or report name, reference number, and the error or current status. Flag time-sensitive payroll or payment issues. Use approved channels for sensitive supporting records.

OneRF Information Hub · Resource directory

Who does what

How the PI, Baruch SPAR, and RFCUNY work together across the grant lifecycle.

The **principal investigator (PI)** leads the project. **SPAR**, Baruch's Office of Sponsored Programs and Research, coordinates campus review and award support. For awards administered by the **Research Foundation of CUNY (RFCUNY)**, RFCUNY handles fiscal administration.

How the three roles work together

- **PI and SPAR**. Proposal materials, campus approvals, and award changes.
- **SPAR and RFCUNY**. Award setup, institutional approvals, and administrative coordination.
- **PI and RFCUNY**. OneRF transactions, financial questions, and expense reconciliation.

Responsibilities by lifecycle phase

Phase	PI · Project lead	SPAR · Campus grants office	RFCUNY · Fiscal administrator
Find funding	Defines the project and checks fit with sponsor priorities.	Helps identify opportunities and confirm eligibility, deadlines, and institutional requirements.	Provides pre-award guidance when requested, such as budget or fiscal-agent information.
Develop & submit	Drafts the narrative and budget justification, gathers attachments, and obtains required School approvals.	Reviews the proposal and budget, coordinates campus routing, and facilitates authorized submission.	Provides institutional or fiscal documentation when its role as fiscal agent requires it.
Set up & manage	Leads the work, oversees spending and deliverables, and initiates or approves assigned OneRF tasks.	Coordinates award setup with RFCUNY, supports campus approvals, and helps route award changes.	Establishes the award account, administers OneRF and fiscal transactions, and coordinates financial reporting.
Close out	Reviews final charges and completes the sponsor's technical or programmatic report.	Coordinates campus closeout tasks and helps resolve outstanding approvals or documentation.	Reconciles the account with input from the PI and SPAR. The RFCUNY project administrator prepares and submits the final financial report as required.

Confirm the assigned approvers and reporting requirements for your award with SPAR and your RFCUNY project administrator. SPAR proposal preparation · SPAR post-award administration · RFCUNY grant roles · RFCUNY closeout

Resource directory

Search official Baruch and RFCUNY resources by task, grant phase, or publisher.

Links reviewed November 22, 2026. Resource links open in a new tab. Pivot, OneRF, and the RFCUNY training job aids require authorized access.

Resource	Publisher	Grant phase	Use it for
SPAR office and staff	SPAR	All phases	Campus contacts and sponsored programs services
Getting Started	SPAR	Find funding	Project abstract and initial consultation
External Funding	SPAR	Find funding	Pivot, GrantForward and Grants.gov
Pivot	ProQuest	Find funding	Search funding opportunities and find research collaborators (sign-in)
GrantForward	GrantForward	Find funding	Search grants from government agencies, foundations and other sponsors
Grants.gov	Grants.gov	Find funding	Find and apply for U.S. federal grants
Internal Funding Sources	SPAR	Find funding	Baruch and CUNY funding opportunities
Research Development and Support	Baruch	Find funding; Develop & submit; Set up & manage	Compliance, research integrity and human-subjects support
Proposal Preparation and Submission	SPAR	Develop & submit	Internal Approval Cover Sheet and proposal support
Grant Proposal Submission Policy (PDF)	SPAR	Develop & submit	Five full business day internal deadline
Budget Guidance	SPAR	Develop & submit	Budget templates, direct and indirect costs
RFCUNY Institutional Information via SPAR	SPAR	Develop & submit	Applicant information and fiscal agent
Frequently Used Documents and Forms	SPAR	Develop & submit; Set up & manage	Campus forms, summer salary and reassigned time
Post-award Administration	SPAR	Set up & manage; Close out	Campus award support and RFCUNY coordination
Forward Funding	SPAR	Set up & manage	Request process for early access to funds
Manage an Award	RFCUNY	Set up & manage; Close out	Post-award procedures and investigator guidance
OneRF sign-in	RFCUNY	Set up & manage; Close out	Workday grant transactions and reports (sign-in)
OneRF Information Hub	RFCUNY	Set up & manage; Close out	System reference, updates and help
OneRF Training Resources	RFCUNY	Set up & manage; Close out	Step-by-step job aids (sign-in)
OneRF training recordings	RFCUNY	Set up & manage; Close out	Recorded demonstrations for reports, expenses, hiring and more
System Access and Grant Role Assignments	RFCUNY	Set up & manage	New users, PI, authorized signatory, timekeeper, preparer and report viewer
OneRF Role Access Matrix (PDF)	RFCUNY	Set up & manage	Business process initiation, routing and approvals

Resource	Publisher	Grant phase	Use it for
OneRF Report Dashboard	RFCUNY	Set up & manage; Close out	Budget, actuals, obligations and project reports
Grants, Contracts and Reporting FAQ	RFCUNY	Set up & manage; Close out	Expenditure drilldowns and encumbrance tracking
Procurement FAQ	RFCUNY	Set up & manage	Jaggaer, non-catalog requisitions, receipts and invoices
P-Cards and Expenses FAQ	RFCUNY	Set up & manage; Close out	Purchasing card reconciliation and expense reports
Post-award Travel Reimbursement	RFCUNY	Set up & manage	Travel receipts, documentation and reimbursement
Hiring and Human Capital Management FAQ	RFCUNY	Set up & manage	Job requisitions, onboarding and extensions
Payroll, Timesheets and Leave FAQ	RFCUNY	Set up & manage	Employee time entry, schedules, leave and approval
Effort Certification Policy	RFCUNY	Set up & manage; Close out	Faculty effort and certification responsibilities
Processing Staff Effort	RFCUNY	Set up & manage; Close out	Staff Effort Notices and semester certification
Subaward guidance	RFCUNY	Develop & submit; Set up & manage; Close out	Subaward documentation and amendments
Closing Out an Award	RFCUNY	Close out	Final technical and financial reporting responsibilities
Closeout FAQs	RFCUNY	Close out	Final expenses, discrepancies and extensions