



# GRANT APPLICATION PROCESS

## **1. WHERE TO BEGIN**

### **A. GRANT APPLICATION IS COMPLETED BY APPLICANT**

- Project is described
- Budget is provided
- Applicant information is provided
- Department number is provided
- Proper authority approval is obtained

### **B. APPLICATION REVIEWAL BEFORE SUBMISSION**

Before submitting, please ensure that your applications has the following:

- Manager's Approval
- Hospital Administrator's Approval
- CHERI President Approval if a CHERI grant request
- WVU – Charleston Division Dean Approval if WVU request

### **C. APPLICATION SUBMISSION**

Applications can be submitted via CAMC Foundation provided link.

### **D. APPLICATION DEADLINES**

- Grants are reviewed quarterly and can be submitted prior to the following deadlines:  
(Dec. 31<sup>st</sup>, Mar. 31<sup>st</sup>, June 30<sup>th</sup>, or Sept. 30<sup>th</sup>)

## **2. WHAT HAPPENS AFTER GRANTS ARE SUBMITTED**

### **A. APPLICATION IS REVIEWED BY FOUNDATION PRESIDENT AND CAMC CEO**

- Determine if additional documentation or information is needed
- Give approval for application to proceed for further review
- CAMC CEO gives approval for presentation to CAMC Foundation Board or the Appropriations Committee

### **B. APPROPRIATIONS COMMITTEE GRANT REVIEWAL**

- A review by the CAMC Foundation Appropriations Committee is scheduled for next quarterly meeting
- Foundation President determines whether or not the applicant must provide an in-person presentation

### **C. IF APPLICANT IS REQUIRED TO GIVE AN IN-PERSON PRESENTATION**

- The applicant is notified that an in-person presentation is needed
- A time for in-person presentation is scheduled on the Appropriations Committee meeting agenda

### **D. APPROPRIATIONS COMMITTEE RECOMMENDS APPROVAL OR DENIAL TO THE CAMC FOUNDATION BOARD OF DIRECTORS**

- Applicants are notified via email and phone call if grant application is denied

### **E. CAMC FOUNDATION BOARD OF DIRECTORS APPROVE GRANT AT THE NEXT QUARTERLY MEETING**

- The meeting is held on the 4<sup>th</sup> Thursday of either January, April, July, or October

### **F. FOUNDATION NOTIFIES APPLICANT**

- Grant approval letter is sent to applicant
- Grantee signs and returns letter to the Foundation
- Grants manager follows-up within two weeks if the signed letter was not received

### **G. THE DEPARTMENT RECIEVES A FOUNDATION GRANT AWARD**

- Foundation Grants Reimbursement process is implemented by the department manager

### **3. DEPARTMENT MANAGER PROCEDURES**

#### **A. THE DEPARTMENT MANAGER TRACKS EXPENDITURES ASSOCIATED WITH THE FOUNDATION GRANT VIA LAWSON PROJECT AND ACTIVITY**

- Recipient uses Lawson Project and Activity Accounting
  - Tracks the expenditures and revenue associated with Foundation grant funds awarded to departments within the Health System
- Project or activity data is posted to specific General Ledger company(s), accounting unit(s) and account/subaccount(s)
  - Captures the various levels of operational detail required by the Foundation prior to releasing grant funding
- Transactions coded to or entered in Project Accounting contains the following information:
  - Date
  - Amount
  - Accounting Unit
  - Account
  - Subaccount
  - Activity
  - Account Category

#### **B. LAWSON PROJECT AND ACTIVITY PROCEDURES FOR RECIPIENT**

- Recipient determines budgeting, processing, and reporting needs for the transactions that they plan to track
- Recipient requests an activity number by completing a Project and Activity Request Form
- Recipient submits Project and Activity Request Form to Accounting Customer Service: [Financial.Reporting@camc.org](mailto:Financial.Reporting@camc.org)
- Recipient uses the assigned activity number and appropriate account category to code all expenses that will be reimbursed with the approved grant funds
- Reimbursable expenses are coded with the appropriate account number. Refer to the GL-COA expense accounts directory, located on the Accounting & Financial Reporting website on CAMnet
- Recipient prepares a reimbursement request packet and submits to the Foundation for processing:
  - A summary report listing the types of expenditures made
  - Supporting documentation attached, to include:
    - An AC290 report (a detailed listing of revenue and expenses for a particular activity)
    - Copies of invoices, etc.

Monitor department's reports to verify the reimbursement amount. The reimbursement will be posted to the revenue section of the department's financial statements and AC290 report for that activity

#### **4. FINAL GRANT PROCEDURES**

Recipient notifies CAMC Foundation if entire grant will not be spent in year approved via email or by letter