

Congratulations on receiving a Student Research Grant! You may be thinking “Great!! Now what do I do?”

PART 1. The next steps:

- 1) Pause! Don’t spend any grant-related money, yet! You need an approved Spend Authorization before spending grant money. Information about Spend Authorizations is coming up.
- 2) Email Faith Phillips (phillips.495@mail.cotc.edu) in the Financial Aid office. Receiving the Student Research Grant funds *may* impact your financial aid (e.g., getting a cash advance *might* impact your financial aid; getting reimbursed after the costs were incurred or if your faculty sponsor uses a PCard for any purchases *might not* impact your financial aid).
- 3) You and your faculty sponsor will receive an email from Grace Hicks, OSU’s Budget & Grants Accountant, with a set of Worktag numbers. You will use those numbers to fill out a form approving the use of your funds (a Spend Authorization). In the Spend Authorization, you will have an option to choose a cash advance. Make sure that you fully understand the impact of a cash advance versus other options on financial aid status. See step 2 above.
- 4) Work with your faculty sponsor to submit the Spend Authorization. There are 2 ways to submit a Spend Authorization, depending on if you have access to Workday:
 - a. Yes, I have access to Workday!
Work with your faculty sponsor to submit the Spend Authorization. Having your Worktag numbers and the budget from your Student Research Grant application ready to refer to helps submission go a little bit more smoothly. If you don’t regularly use Workday in this way, it can be confusing and errors are common – Molly Hahn (hahn.159@mail.cotc.edu) in the OSU Business & Finance office is very helpful and can answer questions that come up and will let you know what errors need to be fixed.
 - b. No, I don’t have access to Workday!
Work with your faculty sponsor to send the Worktag numbers and budget information to Molly Hahn (hahn.159@mail.cotc.edu) in the Business & Finance office. Molly will submit your Spend Authorization in Workday.
- 5) After your Spend Authorization has been approved:
 - a. You will receive a Spend Authorization number. You will use this for some expenses (e.g., flights) and will need it for Expense Report submission (in Part 2).
 - b. Work with your faculty sponsor to spend the funds in line with Ohio State policy (e.g., airfare must be booked through university-contracted travel agencies; the faculty sponsor can check out a Purchasing Card from the Business & Finance office; [click here for Travel Policy document](#)).

- c. Save receipts! If your phone can take pictures, feel free to take pictures of your receipts, too! That way if you lose a receipt, you still have the picture documenting it.

PART 2. What to do after funds are spent?

- 1) Submit Expense Reports (ideally, as expenses occur)!
 - a. If you have access to Workday, work with your faculty sponsor to submit the Expense Report. Having your Spend Authorization number and your receipts ready to go will help this be more efficient. Molly Hahn (hahn.159@mail.cotc.edu) in the OSU Business & Finance office is available to answer questions that come up.
 - b. If you do not have access to Workday, work with your faculty sponsor to send your Spend Authorization number and receipts to Molly Hahn (hahn.159@mail.cotc.edu).
- 2) Is the project or conference completed?
 - a. Confirm with your faculty sponsor that all expenses associated with the Student Research Grant are complete. If they are complete, email our Budget & Grants Accountant, Grace Hicks (hicks.519@mail.cotc.edu) that the grant can be closed.
- 3) Consider presenting your work at the Ohio State Newark's Student Research and Scholarship Forum! Click the link for more information: <https://newark.osu.edu/research/student-research-forum>