

**Document Type:** Policy

**Retrieval Number:** 11,036

**Subject:** Creating Milestones for Award Reporting Requirements

**ORGS Office:** Office of Sponsored Programs

**CMU Partner Office (if applicable):** N/A

**Originator & Original Date:** Sarah Hall 11/20/2025

**Annual Final Approval Provided By:** Executive Director for Research and Innovation

**Applicable Area:** Post Award

**Revision Date(s) and Name of Editor:**

**Timing of Review:** annually in December

**Date(s) of Review(s):**

**Published Location (website, share drive, etc.):** Share drive

**Purpose:**

To establish the standard guidelines for the creation of milestones in Cayuse for the purpose of tracking, and sending reminders, for known reporting requirements.

**Key Definitions**

- **Milestone** – An automated function available through Cayuse that will be used for the purpose of tracking and sending reminders regarding known reporting requirements.

**General Background Information:**

- **Policy #11,021** – Overdue Reports Policy
- **Procedure #10,052** – Creating Milestones for Award Reporting Requirements

**Narrative/Details:**

1. If, as an award is being established in Cayuse, a Post Award team member can identify technical/narrative reporting requirements they will create a milestone for such an item.
2. In general, milestones will only be created for non-financial reporting requirements – tracking other deliverables remains the responsibility of the Principal Investigator/Project Director (PI/PD).
3. Though Post Award will create milestones for non-financial reporting requirements, the timely submission of such items remains the responsibility of the PI/PD.

**Remedies**

If milestones are not created when an award is established in Cayuse, they will be created as soon as the oversight is recognized. The Post Award team member for the project will also send a direct email communication to the PI/PD and inform them of the error and list all remaining reporting requirements.

**Exceptions**

Exceptions for this policy may be granted by the Vice President for Research and Innovation, or their designee, in alignment with other applicable university, federal, state, and sponsor regulations and any other necessary approvals.