



Grant File Readiness Checklist

A practical checklist to help keep every grant file complete, organized, and audit-ready.



1. Grant Basics

- ☐ Executed award agreement is on file
- ☐ Award amount, award number, and grant period are confirmed
- ☐ Funder contact information is recorded
- ☐ Grant purpose and restrictions are documented
- ☐ Internal grant owner is assigned



2. Financial Setup

- ☐ Budget is uploaded and approved version is identified
- ☐ GL, fund, project, or property coding is assigned
- ☐ Match requirement is documented, if applicable
- ☐ Reimbursement or draw process is defined
- ☐ Eligible and ineligible cost guidance is noted



3. Compliance Requirements

- ☐ Reporting deadlines are entered into the calendar
- ☐ All required reports are listed with owners assigned
- ☐ Applicable compliance requirements are documented
- ☐ Closeout requirements and due dates are identified
- ☐ Record retention requirements are noted



4. Documentation & Evidence

- ☐ Key source documents are uploaded
- ☐ Reporting templates are saved in the file
- ☐ Supporting evidence structure is established
- ☐ Reimbursement or draw support is being maintained
- ☐ Important correspondence is retained



5. Monitoring & Audit Readiness

- ☐ Reminder notifications are enabled
- ☐ Internal review cadence is established
- ☐ Submission history is tracked
- ☐ Missing items are flagged and followed up
- ☐ File is reviewed periodically for audit readiness



Recommended file contents

- Award letter or executed agreement
- Approved budget and amendments
- Reporting schedule
- Compliance requirements summary
- Submitted reports and proof of submission
- Financial support and draw backup
- Key correspondence
- Closeout documents

Grant Name: _____

Owner: _____

Review Date: _____



GrantableHQ helps organizations keep awarded grants organized from award setup through audit support.



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