# UMass Medical School Subrecipient Monitoring Record

**How to use:** The Subrecipient Monitoring Record can be used by departments to document subrecipient monitoring efforts and maintain an audit trail. Use of the tracking record is encouraged at all risk levels but is strongly encouraged for medium and high risk subrecipients.

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| **UMass Medical School** |  | **Subrecipient** |
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| UMMS PI Name: |  |  | Subrecipient Name: |  |
| UMMS PS Award#: |  |  | Subrecipient PI: |  |
| UMMS Subaward#: |  |  | Subrecipient Contact: |  |

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| **Subrecipient Period of Performance** |  | **Project Invoicing Frequency** |
| Start Date: |  | End Date: |  |  |  | Monthly |  | Quarterly |

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| **Individual Responsible for Maintaining this Monitoring Record** |
| **Name:** |  | **Title:** |  | **Phone#:** |  |

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| **Scheduled Reporting Dates (based on the terms of the grant award)** |
| **DATE** | **COMMENTS** | **ACTUAL DATE\*** |
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|  \*dates entered as each report is submitted |
| **Informal Progress Reports Completed (these should generally take place at least quarterly)** |
| **DATE** | **METHOD** | **COMMENTS** |
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| **Other Communications** |
| **DATE** | **METHOD** | **COMMENTS** |
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