Creating Awards

Using the information from the NOGA and the Proposal Sign Off form, create the Award.

Creating the Award Header

1. Either search for or use your Favorites to select Create Award Award
2. Click prompt icon to select Company
   Note: This selection needs to be correct. Once the Award is saved the only way to change this is to cancel the award and start over
3. In Name type description of award exactly as it appears in the NOGA
4. In Description type name of the Principal Investigator
   Note: Format is Last Name, First Name
5. Enter Sponsor Award Reference Number provided by Sponsor on the NOGA
6. In Award Date use Calendar icon or type in directly to enter actual budget start date
7. In Award Signed Date, use the Calendar icon or enter in directly to enter the Issue date (when Sponsor approved award)
8. Click prompt icon and select Award Type
9. Click prompt icon and select Purpose Code

<table>
<thead>
<tr>
<th>Award Type</th>
<th>Purpose Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contingent</td>
<td>Career Development K Award</td>
</tr>
<tr>
<td>Contract</td>
<td>Conference</td>
</tr>
<tr>
<td>Cooperative Agreement</td>
<td>Construction</td>
</tr>
<tr>
<td>Grant</td>
<td>Equipment</td>
</tr>
<tr>
<td>Service Agreement</td>
<td>Federal Clinical Trial</td>
</tr>
<tr>
<td>Student Financial Aid</td>
<td>Fellowship</td>
</tr>
<tr>
<td></td>
<td>Nonfederal Clinical Trial</td>
</tr>
</tbody>
</table>

10. Click prompt icon and select Payment Terms
    Note: Choose Net 5 for all Sponsors with a Letter of Credit; Net 30 for all others
11. Click prompt icon in Related Rewards and select the Award this award is related to if appropriate

   Sponsor
12. Click checkbox if this is a Sub Award
    a. Click the prompt icon next to Flow-Through Sponsor
    b. Click Sponsor by Sponsor Type
    c. Search for and select Sponsor providing the over-arching funding

13. Search for and select Sponsor
14. Search for and select Bill-To-Sponsor
15. Click prompt icon to select Payment Type
    Note: All Payment Types must have Manual in the name
16. If Payment Type = Letter of Credit Manual, click prompt icon to search for and select the Letter of Credit
    a. Enter Document ID for the Letter of Credit found on the NOGA

Award Amounts
This section is restricted to amounts for the current award year and comes directly from the NOGA.

Tips for entering amounts:
- Make sure that zeros are removed before typing in each field
- Commas are not required
- ‘Click off’ the field or hit the Tab key to set the number – Enter will not do this!

17. Enter Sponsor Direct Cost amount (salaries, purchases etc..). Hit Tab.
18. Enter Sponsor Facilities and Administration amount. Hit Tab. Sponsor Total will auto calculate
19. Enter Cost Share Total amount. Hit Tab. The Award Total will auto calculate
20. Enter Authorized Amount. Hit Tab.
22. Click checkbox if Cost Share Required by Sponsor is required.

Anticipated Amounts
This section indicates what UR expects to receive over the remainder of the award based on the NOGA.

23. Enter Sponsor Direct Cost amount. Hit Tab.
24. Enter Sponsor Facilities and Administration amount. Hit Tab. The Sponsor Total will auto calculate.

Proposal
25. For Federal Awards:
   a. Type in the Federal Award ID Number (FAIN)
   b. Type in the CFDA Number
26. Use prompt icon to select a NSF Code
   Tip: Use the UR JobAid NSF Codes to find the correct NSF Code to select
27. Enter Proposal ID
Creating Awards & Creating Award Lines

**Award Calendar**

29. Click prompt icon in **Award Schedule**, select Create > Create Award Schedule.
30. Enter Sponsor Award Reference Number in Award Schedule Name field.
31. Click the prompt icon in **Award Posting Interval Group** and select **Budget Period**.
32. Enter number of budget periods in **Number of Years for Award Schedule**. Click OK.
33. In **Year Name**, type a description of the budget period that includes the start and end dates. For example: Full Award Period (2014-09-01 to 2015-05-30) or Year 1 (2014-09-01 to 2015-05-30).
34. In **Year Number**, enter year corresponding to this budget period. Click OK.
35. In **Start Date**, type date this period begins.
36. Click in **End Date**, type date this period ends.
37. Repeat steps 33 – 36 for each budget period.
38. Click OK.
39. Continue by creating **Award Lines**.

**Creating Award Lines**

Before starting, identify the next available Grant ID by viewing your last Award or using the View Grant report.

**Line Item Details**

1. Click the prompt icon in **Grant Type**.
2. The **Company** defaults in from Award Header. For Primary Award Line, accept the default. Change the Company for subsequent Award Lines if needed.
3. In **Line Type**, accept the default of Cost Reimbursable, or use prompt icon to select Fixed Amount.
4. Click **Primary** checkbox for the first Award Line. There can only be one Primary Award Line per Award.
5. Click prompt icon in **Grant**, and select Create > Create Grant.
   a. In **Grant Name**, type Sponsor Award Reference Number. Note: For subsequent Grants in the Award, append the name/initials of the PI or Subcontractor or other identification to ensure Grant Name is unique.
   b. Type a unique Grant in **Grant ID**. Must begin GR5.
   c. Click checkbox next to Include Grant ID in Name.
   d. Click prompt icon next to Worktags.
   e. Click **Cost Center**. Search for and select the Cost Center. Click **Top**.
   f. Click **Funds**. Search for and select **Sponsored Awards - Unrestricted** fund. Click **Top**.
   g. Click **Company for FAO**. Search for and select the one that matches the Company for this Award Line.
   h. Click the plus sign (+) under **Assign Roles**.
   i. Click the prompt icon in **Role**. Select **Principal Investigator**.
   j. Use the prompt icon to search for and select **PI in Assigned To**. Note: UR Lead PI and Grant Financial Analyst roles will auto-populate via an integration.
   k. Click OK. Repeat step h to add a Co-PI if needed.
6. In **Line Amount**, type the dollar amount for this Award Line. Hit Tab.
7. In **Revenue Category**, enter the appropriate RC for sponsored awards. Note: Standard is RC10700.
8. In **Rate Agreement**, click prompt icon and select agreement based on NOA. Note: Basis Type and Object Class Set automatically default.
9. In **Cost Rate Type**, click prompt icon and select the correct one for this Award Line.

**Cost Rate Types**

- On/Off Campus Research
- On/Off Campus Other Sponsored Activity
- Industry Sponsored Clinical Trial

10. To add an Exception to the F&A Rate agreement, click prompt icon in **Exception**.
   a. Click Create > Create Facilities and Administration Exception.
   b. In **Exception Name**, type Grant ID + meaningful description - must be unique!
   c. Accept the default Basis Type.
   d. In **Exception Type**, choose the appropriate type.
   e. Enter the unique set of requirements from the sponsor.
   f. Click OK.
11. In **Revenue Allocation Profile**, click prompt icon and select the profile that matches the Company of the Award Line.
12. In **From Date**, enter the date the activity on the Award Line will start.
13. In **To Date**, enter the date activity on Award Line will end.
14. In **Worktags**, enter the same three worktags that were entered on the Grant (Cost Center, Fund, Company for FAO).
15. If this Award Line is for a Subcontractor, click prompt icon in **Subcontractor**. Search for and select the name of the subcontractor being used.
16. Repeat Steps 1 – 15 for each Award Line needed for this Award.

17. Review all entries for entire Award, including Award Lines.
18. Click **Submit**.