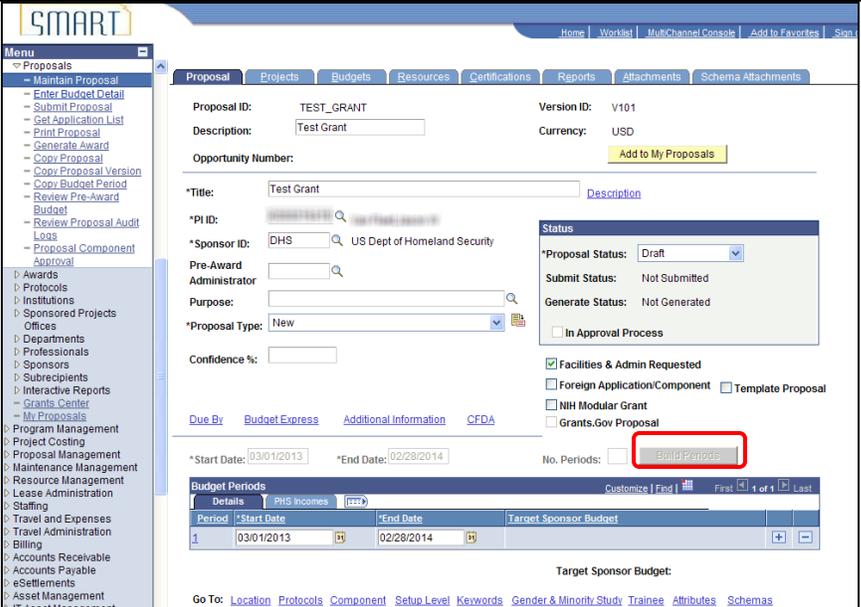
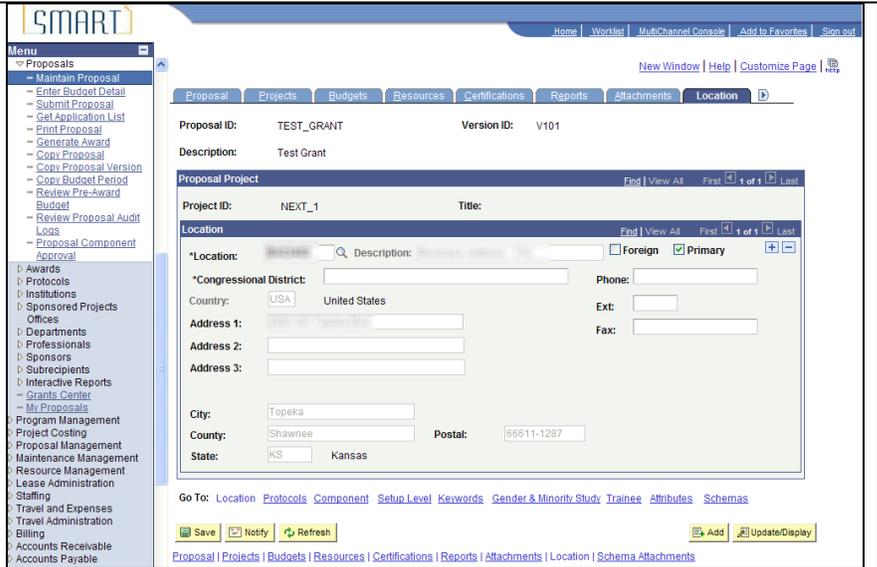


Date Created:	02/06/2013
Version:	1.0
Scenario:	<p>The Grants module manages the pre-award side of the grants process. Specifically, it stores proposal and award information, including budget data. This job aid demonstrates how to create a grant.</p> <p>Note that grant expenditure tracking occurs in the Project Costing module, and reimbursement process occurs via attaching a project to a contract in the Customer Contracts module. The 3 modules work together to manage end-to-end grant processing.</p>
<p>1. Navigate to: <i>Grants > Proposals > Maintain Proposal</i></p> <p>Click on the <i>Add a New Value</i> tab. The Business Unit should default based on user security. Enter the Proposal ID in the <i>Proposal ID</i> field and click the <i>Add</i> button.</p>	 <p>Note: The Proposal ID field has a 15 character limit. There should be no spaces. The only allowable special characters are dashes and underscores.</p>
<p>2. On the <i>Proposal</i> tab, enter data into the following fields:</p> <p><i>Description</i> *Title *PI ID *Sponsor ID *Start Date *End Date</p> <p>No. Periods (then click the <i>Build Periods</i> button to create budget periods for your grant period)</p>	

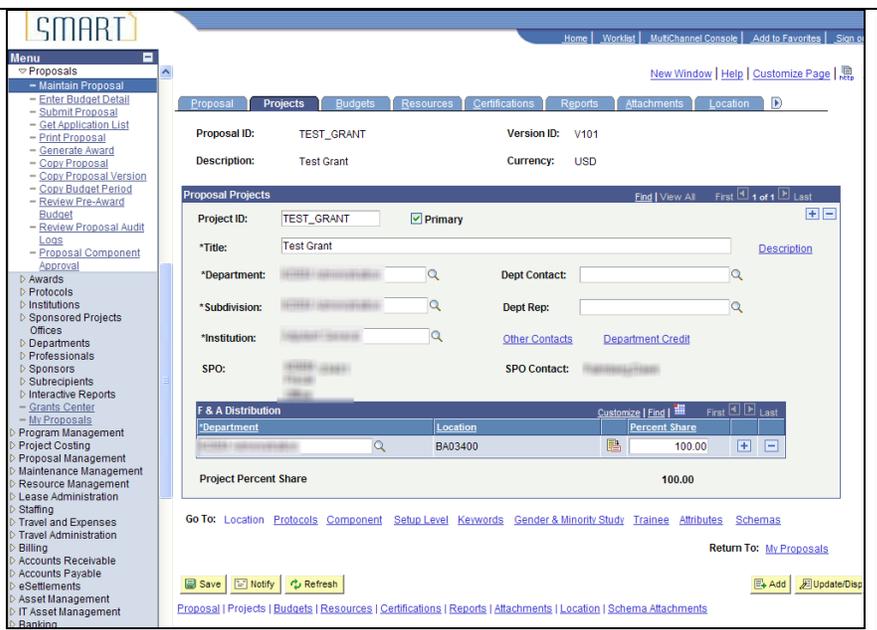
3. Click on the *Location* link at the bottom of the page. Enter the location code for the physical location where the grant work will be taking place.



4. Click on the *Projects* tab. Enter data into the following fields:

Project ID
Department
Subdivision (same as *Department*)
Institution

F&A Distribution section:
Department



Note: The Project ID field has a 15 character limit. There should be no spaces. The only allowable special characters are dashes and underscores.

5. Click on the *Budgets* tab. Enter data into the following fields, then click Save:

Budget ID
Description

SMART

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page

Proposal | Projects | **Budgets** | Resources | Certifications | Reports | Attachments | Location

Proposal ID: TEST_GRANT Version ID: V101
Description: Test Grant Currency: USD

Proposal Project: TEST_GRANT Title:
Find | View All | First | 1 of 1 | Last

Budget Header:
Find | View All | First | 1 of 1 | Last

*Budget ID: GRANT_ACTIVITY Description: Test grant activity
Start Date: 03/01/2013 End Date: 02/28/2014 Include in Proposal

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	03/01/2013	02/28/2014		Program Income	

F & A and Pricing Setup Total:

Go To: Location | Protocols | Component | Setup Level | Keywords | Gender & Minority Study | Trainee | Attributes | Schemas

Save | Notify | Refresh Add | Update/Display

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments | Location | Schema Attachments

Note: The Budget ID becomes the Activity ID in Project Costing when the grant is awarded. It can be re-named at the time of award, if needed.

6. If the agency wishes to use the auto-F&A calculation, click on the *F&A and Pricing Setup* link beneath the Budget Period box. Enter data into the following fields, then click Apply, then OK:

Rate Type
FA Base (in the Institution, Sponsor and Budget sections)

SMART

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

F & A and Pricing Setup

Proposal ID: TEST_GRANT Version ID: V101
Description: Test Grant Budget ID: GRANT_ACTIVITY
Project ID: TEST_GRANT

Institution Minus Funded Sponsor Minus Funded

Contracts Related

*Pricing Method: As Incurred
*Product: GRANTS_AS_INCURRE

F&A Set Up:
Find | View All | First | 1 of 1 | Last

*Rate Type: S_ALL All Locat

Institution Rates:
Find | View All | First | 1 of 1 | Last
FA Base: TDC Total Direct Cost Effective Date: 01/01/1901 FA Rate %: 2.90

Sponsor Rates:
Find | View All | First | 1 of 1 | Last
 Same as Institution
FA Base: TDC Total Direct Cost Effective Date: FA Rate %:

Budget Rates:
Find | View All | First | 1 of 1 | Last
FA Base: TDC Total Direct Cost *Effective Date: 01/01/1901 FA Rate %: 2.90

OK Cancel Apply

Note: if the F&A rate % to be used on this proposal differs from the percentage that defaults into the *Budget Rates* box, the user may change the value.

7. Click on the 1 link in the *Period* box to enter budget detail for the first budget period.

Enter *Budget Item* values and *Total Direct* amounts for each line. Use the  icon to add rows, as needed.

Note: clicking on the  icon for any line will display a screen where additional item details can be entered (e.g. per item cost, quantity, etc.)

8. When selecting the **SALARIES** budget item, the Details icon allows the user to identify specific individuals working on the grant and uses their actual salary rate when budgeting, based on the *Appointment Type* and *Effort Pct* entered. Click OK.

Note: The Row No. field corresponds to individuals listed on the *Resources* tab of the proposal in the *Professional* section. Individuals must be listed here before they can be selected in the budget.

9. If Cost Share is appropriate, click the *Cost Share* link on the budget line and enter data in the following fields, then click OK:

Cost Share Percent

Institution box:
Department
C/S Pct

Cost Share

Budget Period: 1 Start Date: 03/01/2013 End Date: 02/28/2014
 Budget Line Number: 10 Budget Item: SUPL Materials & Supplies

Cost Sharing

Total Direct: 2,000.00 Cost Share Percent: 50.00
 Sponsor Direct: 1,000.00 Cost Share Direct: 1,000.00

Cost Sharing Distribution

Institution	Department	C/S Pct	C/S Direct
		100.00	1,000.00
Third Party			
Description	C/S Pct	C/S Direct	
Distribution Totals:		100.00	1,000.00

OK Cancel

Note: Use the highest level Department ID value (representing the agency). If there is any Third Party cost share, enter it in the appropriate box.

10. As Budget Items and Cost Share are entered, the system keeps a running total at the bottom of the Budget Detail page. Click Save.

Enter Budget Detail

Proposal: TEST_GRANT Currency: USD
 Version: V101 Start Date: 03/01/2013 End Date: 02/28/2014
 Title: Test Grant Modular?

Project ID: TEST_GRANT Budget Period: 1
 Budget ID: GRANT_ACTIVITY Start Date: 03/01/2013 End Date: 02/28/2014

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share
10	SUPL	Materials & Supplies		2,000.00	1,000.00	Cost Share	<input type="checkbox"/>
20	SALARIES	Salaries & Wages		48,485.00	48,485.00	Cost Share	<input type="checkbox"/>

Sponsor Direct: 49,485.00 Sponsor F&A: 1,435.00 Total Sponsor Budget: 50,920.00
 Institution Cost Share: 1,000.00 Institution Cost Share F&A: 29.00 Total Inst C/S Budget: 1,029.00
 Third Party Cost Share: 0.00 Total TP C/S Budget: 0.00

Total Direct: 50,485.00 Total F&A: 1,464.00 Total Budget: 51,949.00

Return To Maintain Proposal Save Return to Search Notify

11. Click the *Return to Maintain Proposal* link to return to the *Budgets* tab.

Note: only the Sponsor requested amount of the budget displays on this page.

All required proposal information has been entered at this point.

Budgets

Proposal ID: TEST_GRANT Version ID: V101
 Description: Test Grant Currency: USD

Project ID: TEST_GRANT Title: Test Grant

Budget Header

Budget ID: GRANT_ACTIVITY Description: Test grant activity
 Start Date: 03/01/2013 End Date: 02/28/2014 Include in Proposal

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	03/01/2013	02/28/2014	50,920.00		
Total:			50,920,000		

F & A and Pricing Setup

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes Schemas