**State of Kansas**



**Blue Bird Award Process**

***Statewide Management, Accounting and Reporting Tool***

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| **Date Created:** | 10/16/2015 |
| **Version:** | 1.0 |
| **Last Updated Date:** | 10/16/2015 |
| **Scenario:** | A blue bird award is granted without an initiating proposal in the Grants module. You must enter all of the information related to the award in the Contract Header pages in Contracts. |
| **Security:** | Role Security: Agency Customer Contracts Manager  BU Security: Business Unit Security is applied.  Use of the **Customer Contracts** and **Project Costing WorkCenters** will provide ease of navigation under the **Links** section of the WorkCenter. |
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| Step 1. Navigation: Project Costing > Project Definitions > General Information > Add a New Value tab. Enter the following information:  Business Unit  Project Name  Note: The BU should default. The system requires unique naming for Project Name across all business units. Consider using the agency BU as part of the naming convention, *\_A, \_B*, or \_(*year started/ending*). |  |
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| Step 2. The *General Information* tab will be displayed. Enter the following information:  Description (free form field)  Integration  Project Type  Start Date  End Date  Click the *Save* button. |  |
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| Step 3. Select the *Project Activities* hyperlink at the bottom of the page. When the page displays, enter the following information:  Activity Name  Activity  Verify the dates are correct. Click *Save.*  Note: Activity will be the name displayed in the system when selecting an activity on distribution lines, Inquiry pages, and queries. Add as many Activities, as needed. |  |
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| Step 4. Create the contract. Navigation: Customer Contracts > Create and Amend > General Information > Add a New Value tab. Enter the following information:  Business Unit  Contract  Sold to Customer  Click the *Add* button.  Note: Using the Contracts WorkCenter at this point is convenient. |  |
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| Step 5. When the page displays, enter the following:  Description  Contract Signed |  |
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| Step 6. Select the Lines tab. Select the *Add Contract Lines* button. Add the Rate based contract line. Click *Save*. Click the *Return to Contract Lines* hyperlink.  Note: For more information on this process, see the *How to Enter a Customer Contract* Job Aid. |  |
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| Step 7. Click *Save* on the *Lines* tab. Click the *Action* arrow and select *Define Contract Terms.* The split window will display Contract Terms in the lower portion and the Contract Lines tab in the upper portion. Move the lower portion up or down by selecting the ………. in the center of the window. Enter the following information in the lower *Define* *Contract Terms* page:  PC Business Unit  Effectvie Date  Project  Activity  Click *Save* in the *Define Contract Terms* page (lower page).  Note: If multiple Activities are to be associated with the Contract, each Activity will require a separate Project/Activity line. |  |
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| Step 8. Click the *Review Accounting Distribution* tab in the lower split window.  In the *Unbilled AR* grid, update the distribution lines. Scroll right to view the entire line. Click *Save*. Cllick *OK* to message pertaining to Unbilled AR being updated.  Scroll to the far right and verify that the *Valid* checkbox is now checked.  Scroll left. Close the Related Content split window by clicking the down arrow to the left of *Related Content.* |  |
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| Step 9. (Optional) To incorporate the LOC ID on the contract, while still on the Lines tab, on the right side of the page, use the lookup for the *Go To More*, and select *Billing Options.* In the Grants Information grid, select the radio button for *Letter of Credit*. Use the lookup to select the LOC ID.  Note: The Letter of Credit is the account identifier attached to a federal award (the account number). The 9.2 upgrade now includes the Federal Financial Report. For reporting multiple grants, the LOC functionality must be used. If the choice is made to not use the LOC, then the user is able to run the FFR by using the Contract ID. The LOC is entered on the Sponsor page Grants > Sponsors > General Informaiton > Details tab. |  |
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| Step 10. (Optional) Select the *Lines* tab. Under the *Contract Lines* grid, if using the LOC ID, a *LOC Detail* tab will now appear. Enter the following information:  LOC Doc ID  Note: The Sponsor Draw Down report uses this field. |  |
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| Step 11. Select the *General* tab. Click *Save*. Select the *Amount Allocation* hyperlink. The *Billing Allocation* window opens. Under the *Contract Line Pricing* grid, enter the *Billing Limit* for the Contract Line. In the *Contract Billing* grid, enter the *Total Billing* amount. Click the *Recalculate* button. Confirm that the *Unallocated Billing Amount* equals 0.00. Click *Save*. The Allocation should now be **Complete**. Click *Save*. Click the *Return to* *General Information* hyperlink. |  |
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| Step 12. On the *General* tab, toggle the *Contract Status* to Active.  Verify the Billing and Revenue plans are *Ready*. |  |
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| Step 13. Create the Award Profile. On the Contract *General* tab, click the arrow to the left of *Other Information*, opening the section. Click the *Create Award Profile* button. |  |
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| Step 14. Click *OK* to the Award Profile successfully created message.  Click the *View Award Profile* hyperlink. |  |
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| Step 15. Award Profile updates. Some of the information from the Contract populates during creation of the Award Profile. The following information should be entered on the *Award Profile*:  Title  Long Description  Award PI  Start Date  End Date  Note: If you try to save at this point you will receive a message concerning the Department. |  |
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| Step 16. Click the *Department Credit* tab. Enter the following information:  Department  Credit %.  Note: The Reference Award number may be entered on both the Award tab and Funding tab, if desired. |  |
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| Step 17. Click the *Funding* tab. Enter the the following information:  Start Date  End Date  Click *Save*. |  |