******State of Kansas**

**How to Create a Grant**

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

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| **Date Created:** | **02/06/2013** |
| **Version:** | **1.0** |
| **Last Updated**  | 3/11/2019 |
| **Scenario:** | 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.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. |
| 1. | Navigation: Projects and Grants Homepage > Creating a Grant > Maintain Proposal **or** Navigator > Grants > Proposals > Maintain Proposal.Click on the Add a New Value tab. The Business Unit should default based on user security. Enter the Proposal ID in the Proposal ID field and click the Addbutton. | Note: The Proposal ID field has a 15 character limit. There should be no spaces. The only allowable special characters are dashes and underscores. |
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| 2. | On the *Proposal* tab, enter data into the following fields:Description\*Title\*PI ID\*Sponsor ID\*Start Date\*End Date\*No. Periods Click the Build Periodsbutton to create budget periods for your grant period. |  |
| 3. | Click on the Locationlink at the bottom of the page. Enter the location code for the physical location where the grant work will be taking place. |  |
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| 4. | Click on the Project*s* tab. Enter data into the following fields:Project IDDepartmentSubdivision (same as Department)InstitutionF&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. |
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| 5. | Click on the Budgetstab. Enter data into the following fields, then click Save:Budget IDDescription | C:\Users\lshaver\AppData\Local\Temp\SNAGHTMLf023a69.PNGNote: 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. |
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| 6. | **If the agency wishes to use the auto-F&A calculation**, click on the F&A and Pricing Setuplink beneath the Budget Period box. Enter data into the following fields, then click Apply, then OK:Rate TypeFA Base(in the Institution, Sponsor and Budget sections)Click OK. | 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. |
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| 7. | Click on the 1link in the Periodbox to enter budget detail for the first budget period.Enter Budget Itemvalues and Total Directamounts for each line. Use the  icon to add rows, as needed. | Note: clicking on the Details  icon for any line will display a screen where additional item details can be entered (e.g. per item cost, quantity, etc.) |
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| 8. | When selecting the SALARIESbudget 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 Typeand 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. |
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| 9. | If Cost Share is appropriate, click the Cost Sharelink on the budget line and enter data in the following fields, then click OK: Cost Share PercentInstitution box:DepartmentC/S Pct | 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. |
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| 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. |  |
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| 11. | Click the Return to Maintain Proposallink to return to the Budgetstab.Note: Only the Sponsor requested amount of the budget displays on this page.All required proposal information has been entered at this point. |  |