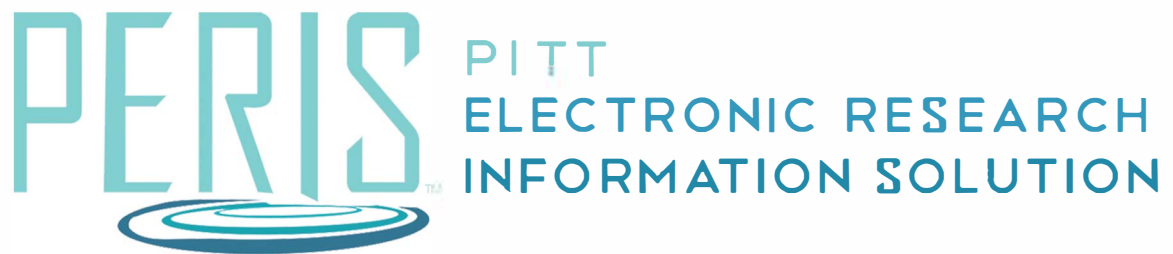




University of Pittsburgh



Quick Reference

CREATING A NEW AWARD WITH SUBACCOUNTS.....2-3

Creating a New Award with Subaccounts

Where to start?

1. After logging in click the MyFunding tab and search for the Funding Proposal being awarded.

How do I create a New Award with Subaccounts?

2. Click *Create Funding Award*.
3. Enter required data in the General Award Information SmartForm. Click *Continue*.
4. Confirm that the correct proposal is being funded. Click *Continue*.
5. Click 'Add'. Create all anticipated financial accounts for the parent (budget years). For subaccounts 'Add' all anticipated financial accounts for each subaccount. The subaccount should follow this format "Subaccount Period # - PI First Name PI Last Name - PI Department # (optional Account Descriptor)" *Continue*.
6. Click *Update* to edit a Budget Allocation. Add 'Parent' to the Year 1 Allocation name. Enter associated data. Change allocation to "Authorized by Sponsor". Update or Add a new allocation for each subaccount. Name each subaccount allocation the same as the financial account. Change the PI to the subaccount PI. *Continue*.
7. Choose the budget allocation under "Select the Budget Allocation to Display" **This is to be completed by the department administrator.**
8. Click 'Import.' Choose 'Period 1' from the Budget. Click 'OK'. Create a budget by populating the 'Adjustments' column to get the budget balanced and the "Difference" field in the top right hand corner to become zero. Click *Continue*. **This is to be completed by the department administrator.**

The screenshot shows the 'MyFunding' interface. At the top, there are tabs for 'Awards' and 'Reports', and a 'MyFunding' tab. Below this is a 'Create Funding Award' button. The main area contains several sections with numbered callouts:

- 2:** Points to the 'Create Funding Award' button.
- 3:** Points to the '4. * Select instrument type:' section, which has a radio button for 'Grant'.
- 4:** Points to the '1. Financial accounts:' section, which has a '+ Add' button.
- 5:** Points to the '1. Add / edit and remove budget allocations:' section, which has a '+ Add' button.
- 6:** Points to the '13. * Authorized:' section, which has three radio buttons: 'Authorized by Sponsor' (selected), 'Advance Account', and 'Not Authorized'.
- 7:** Points to the 'Select the Budget Allocation to display:' dropdown menu, which currently shows 'National Institutes of Health Award Period 1'.
- 8:** Points to a summary table at the bottom.

Total Sponsor Awarded: ?	\$1,000
Total Reconciled: ?	\$1,000
Difference: ?	\$0

Creating a New Award with Subaccounts

10 Terms and Conditions

1. Terms and conditions:

11 Deliverables

1. Add deliverables

Add

12 Compliance Review

1. * Human Subjects:

Yes No [Clear](#)

13 Finish

14 Assign Specialist

15 Email Award Editors

15 Email Specialist

16 Submit for Review

17 Submit for Final Review

18 Activate

19 Email SPA

9. Add individuals who are not already listed on the project. Click *Continue*. **This is to be completed by the department administrator.**
10. Add Terms and Conditions from the award document. *Continue*.
11. To add a deliverable click *Add*. Click *Continue*. **To be completed by department administrator.**
12. Review and update Compliance Review. Click *Continue*.
13. Click *Finish*.
14. Click on '*Assign Specialist*' Assign yourself as the Specialist.
15. Click *Email Award Editors*. Editors will review the award, enter the budget, and deliverables. Editor will click *Email Specialist* when complete.
16. When the department notifies you of completion via '*Email Specialists*' click "*Submit for Review*". Add the Dean's Area reviewer as the Designated Reviewer. Add yourself as Award Approver. Click *OK*.
17. Designated Reviewer completes review, and clicks on the "*Submit for Final Review*" activity on the left-hand side of the screen. Click *OK*.

What's next?

18. Click on the "**Activate**" activity on the left-hand side of the screen. Click *OK*.
19. Click "**Email SPA**" to complete the process.