

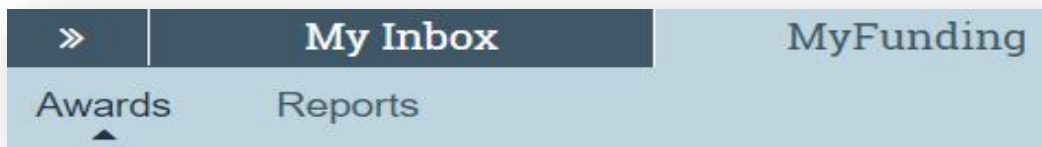
**Overview:** A 'Budget Allocation Correction' amendment/modification should be requested to make corrections to a budget period.

**Examples:**

1. To correct the total budget amount (i.e. budget activated for \$150,000 that should have been activated for \$15,000).
2. To correct the indirect cost rate (i.e. the indirect cost rate was activated at 50.5% that should have been activated at 56.5%).

**Where to Start**

1. Log-in to MyFunding and search for the award in the Awards tab:



2. Search for the award in the search box and click on the 'Name' of the award:



3. Locate the modification to update and click on the 'Name' of the modification:



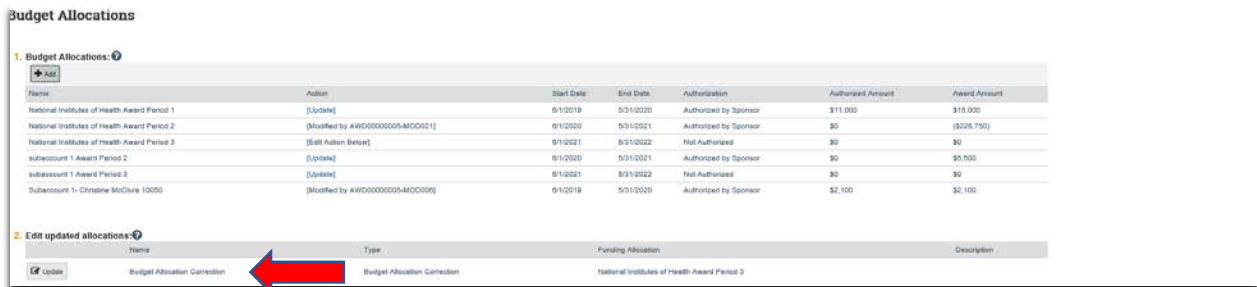
4. Click the 'Edit Award Modification' button to open the modification:



5. Review the information on the 'Award Modification' page and click 'Jump-To' to the 'Budget Allocations' page:



6. On the 'Budget Allocations' page click 'Update' next to the allocation to be updated:



7. Once in the 'Add or Edit Funding Action' screen enter/confirm the following:

- a. New 'PI' (if applicable)
- b. New 'Start Date' (if applicable)
- c. New 'End Date' (if applicable)
- d. 'Incremental direct amount' being added or subtracted to the allocation
- e. 'Incremental indirect amount' being added or subtracted to the allocation
- f. New 'Indirect Rate' (if applicable)
- g. New 'Indirect Cost Base Type' (if applicable)

Department-How to Set-up an Amendment/Modification: Budget Allocation Correction

**15. Current authorized direct amount:**

**Incremental direct amount:**

**16. Current authorized indirect amount:**

**Incremental indirect amount:**

**17. Current authorized total:**

**New authorized total:**

**18. Current indirect rate: (%)**

**New indirect rate: (%)**

**19. Current indirect cost base type:**

**\* New indirect cost base type:**

**20. Current salary cap:**

8. On the Award/Authorized Budget Reconciliation (formerly the Form 0202) page click 'Select the Budget Allocation to display' (this will open the budget reconciliation to enter the budget information). Select the budget allocation that is being updated:



9. Enter the budget information into the subcodes in the 'Adjustments' column until the 'Difference' is zero and click 'Save':

## Department-How to Set-up an Amendment/Modification: Budget Allocation Correction

Award / Authorized Budget Reconciliation

All Allocations

Total Sponsor Awarded to Date:	\$668,778	Current Allocation	
Total Reconciled to Date:	\$843,778	Total Sponsor Awarded:	\$843,778
Difference:	-\$175,000	Total Reconciled:	\$843,778
Cost Share:	\$0	Difference:	\$0

Select the Budget Allocation to display: UPMC Enterprises Award Period 1 Undo All Changes

Start Date: 2/1/2018 End Date: 6/30/2020

Budget Categories	Baseline	Rollup Adjustments	Adjustments	Cost Share	Active Allocation Total
Medical Faculty RFT Regular Earnings	5000	\$143,605	\$0	\$70,000	\$213,605
Non-Medical Faculty RFT Regular Earnings	5100	\$0	\$0	\$25,000	\$25,000
Research Associates RFT Regular Earnings	5200	\$0	\$0	\$0	\$0
Staff RFT Regular Earnings	5400	\$284,912	\$0	\$0	\$284,912
GSR-PHD Regular Earnings	5660	\$0	\$0	\$0	\$0
Stipend-Training Grant	5820	\$0	\$0	\$0	\$0
Fringe Benefits-General (Spon Proj Budget only)	5900	\$0	\$0	\$0	\$0
Fringe Benefits-Medical Faculty	5901	\$39,951	\$0	\$33,500	\$73,451
Fringe Benefits-Non-Medical Faculty	5903	\$0	\$0	\$17,000	\$17,000
Fringe Benefits-Research Associates	5905	\$0	\$0	\$0	\$0

10.If the Personnel have changed on the award update the personnel by either adding new personnel or removing personnel who are no longer on the project, then click 'Continue':

Personnel

1. Name: National Institutes of Health Award Period 1 PI: Natalie Merz  
 Financial Account: year 1 Period: 1  
 Start Date: 6/1/2019 End Date: 6/31/2020

Person	Role	Role Other	Start Date	End Date	Remove R
Natalie Merz	PI/PI		6/1/2019	5/31/2020	
Michael Ranieri	Faculty		6/1/2019	5/31/2020	
Eric Larson	None		6/1/2019	5/31/2020	
<input type="text"/>	None				<input type="button" value="Find"/>
<input type="text"/>	None				<input type="button" value="Find"/>

11.On the 'Completed Award Modification' page click 'Finish':

MyFunding

Edit: Award Change - AWD00000005-MOD002

You Are Here: Smoke Test NM 3 Patch 3/8/19 - Modification #2

Save Exit Hide/Show Errors Print Jump To Finish

### Completed Award Modification

In the toolbar, select "Hide / Show Errors" to validate that the form is complete. Update any errors or incomplete sections.

To complete this component of the award set-up process, please click the Finish button on the right and execute the Notify Award Editors activity, which should allow the department to access the award and complete the budget and compliance components of the award.

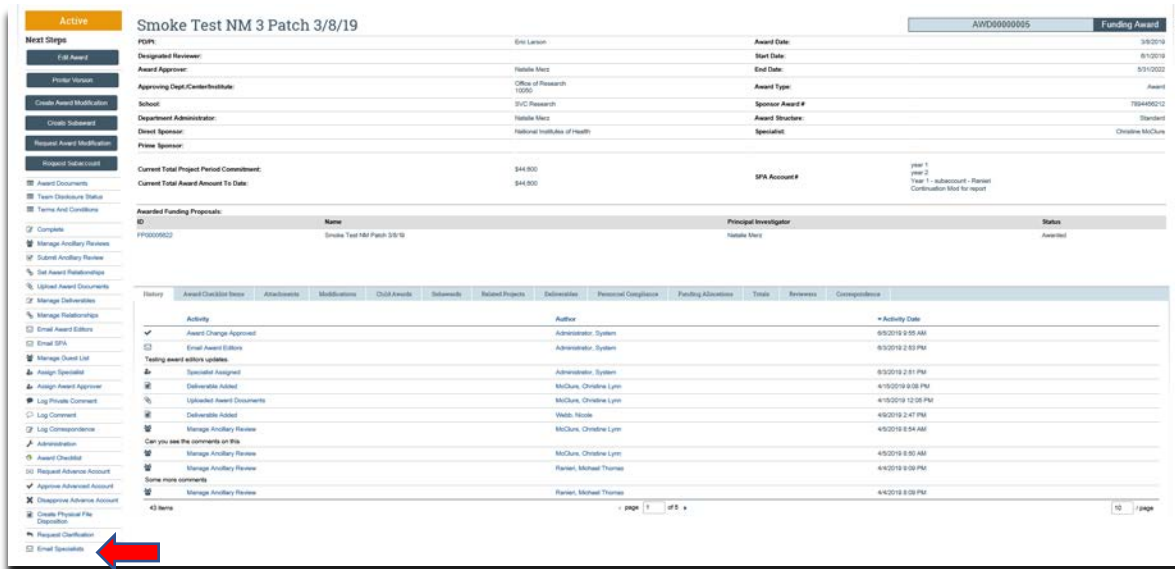
Save Exit Hide/Show Errors Print Jump To

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12. In the modification workspace click on the 'Parent Award' title to return to the main award workspace:



13. In the award workspace click 'Email Specialist' to notify the specialist that the award amendment/modification has been updated:



**What do I attach (if not included with the modification request)?**

1. Any documents requiring a signature by the Office of Research (OR).
2. Any other school-specific required documents.
3. NOA/sponsor document noting change.

**What's Next?**

1. The Specialist will review the award amendment/modification and if acceptable, will 'Approve' the award amendment/modification and release to Sponsored Projects Accounting (SPA).

