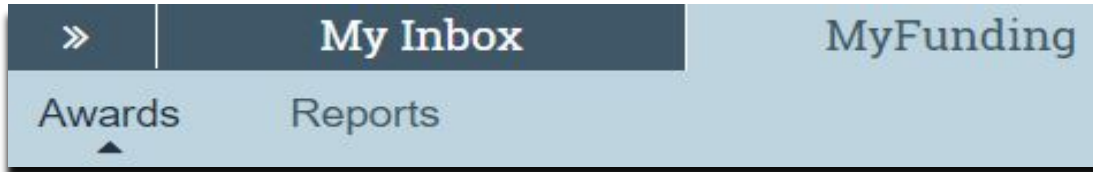


How to Set-up a New Award (with subaccounts) - Department

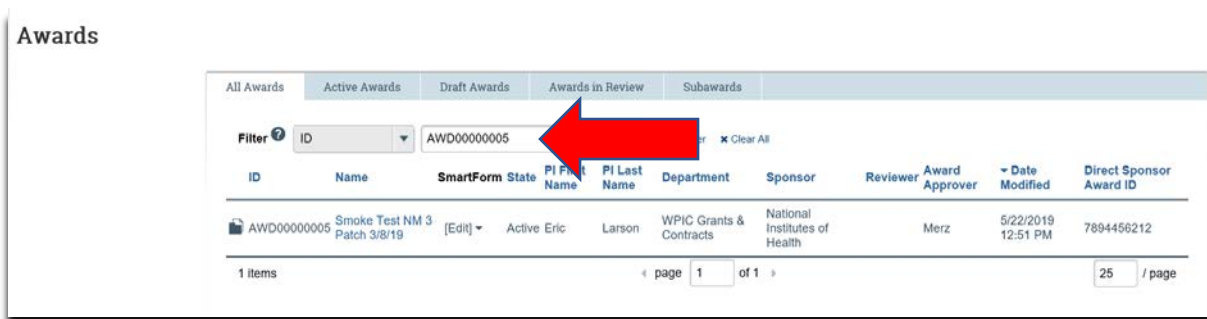
Overview: This guidance document is to assist department administrators with setting up new awards with and without subaccounts in MyFunding.

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. Once in the award workspace, click on 'Edit Award':



How to Set-up a New Award (with subaccounts) - Department

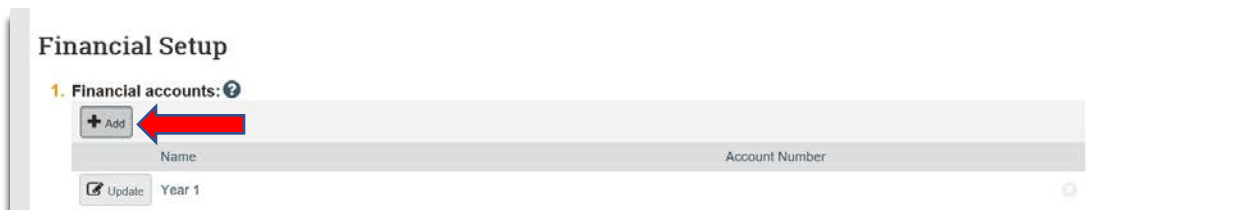
- Once in the award smartform series, review each award smartform by clicking on the 'Continue' button on the top right-hand side of the screen. If changes are made, only 'Save' or 'Continue' will save those changes. Using 'Back' or 'Jump To' will not save any changes made to the smartform:



The screenshot shows the 'General Award Information' section of a smartform. The top navigation bar includes a 'Continue' button on the right, which is pointed to by a red arrow. The form fields are as follows:

- 1. * Award title: Input field containing 'mtr test'.
- 2. * Principal investigator: Dropdown menu showing 'Eric Larson'.
- 3. Award type: Dropdown menu showing 'Award'.
- 4. * Select instrument type: Radio button options for Grant (selected), Contract, Cooperative Agreement, Subaward/Subcontract, and Other. A 'Clear' link is also present.

- If subaccounts are needed, click 'Add' on the 'Financial Setup' page:



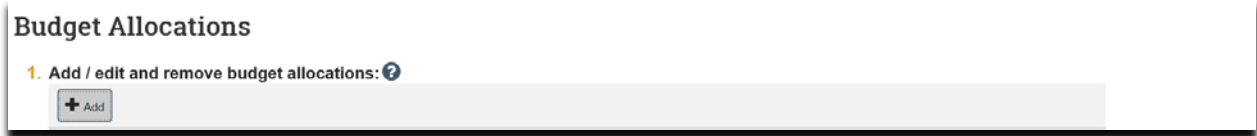
The screenshot shows the 'Financial Setup' section. The 'Add' button is highlighted with a red arrow. Below it is a table with columns for 'Name' and 'Account Number'. An 'Update' button is visible at the bottom left.

- In the 'Name' box, enter the subaccount information. The subaccount must be named following this format: 'Subaccount #-PI First Name PI Last Name - optional account descriptor (Subaccount Department Number)', then click 'OK' and 'Continue':

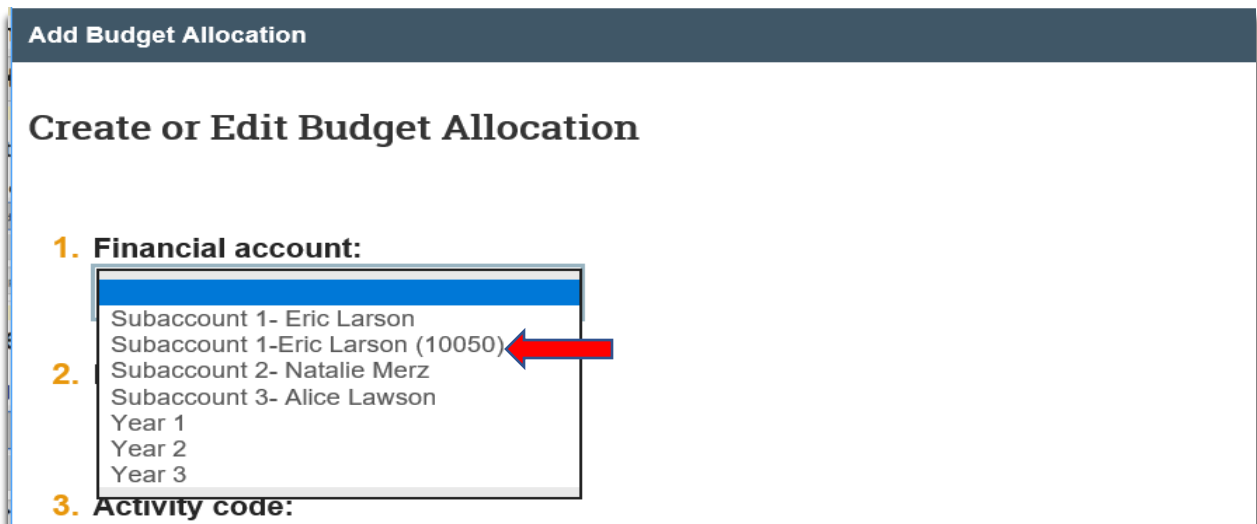


The screenshot shows a dialog box titled 'Edit Click Grants Financial Account DE'. The 'Name' field contains the text 'Subaccount 1-Eric Larson (10050)'. At the bottom, there are three buttons: 'OK', 'OK and Add Another', and 'Cancel'. A red asterisk and the word 'Required' are located to the left of the 'OK' button.

7. On the 'Budget Allocations' page, click 'Add':



8. In box 1 'Financial Account', select the subaccount Financial Account created in step 6 (above).



9. Enter the 'Period Number' (year number, 1, 2, 3...)

How to Set-up a New Award (with subaccounts) - Department

1. Financial account:

2. Project ID:

3. Activity code:

4. Period number:

10. Enter the 'Subaccount Name'. The subaccount must be named following this format 'Subaccount #PI First Name PI Last Name optional account descriptor (Subaccount Department Number)':

Create or Edit Budget Allocation

1. Financial account:

2. Project ID:

3. Activity code:

4. Period number:

5. * Name:

6. Description:

11. Click the radio button next to the funding proposal to select the associated funding proposal, and change the PI on the subaccount allocation to the subaccount PI:

How to Set-up a New Award (with subaccounts) - Department

8. * Associated funding proposal:

ID	Name	Principal Investigator
<input checked="" type="radio"/> FP00000068	mtr test	Eric Larson

[Clear](#)

9. PI:

larson| X ...

Last	First	Organization
Larson	Barry	UPB Blaisdell Hall Operations
Larson	Ellen	History of Art & Architecture
Larson	Eric	Office of Research
Larson	Erica	Microbiology and Molecular Gen
Larson	Gabriel	Campus Recreation
Larson	Grant	Critical Care Medicine
Larson	Kelly	Engr-Operations
Larson	Madeline	Social Work Academic Programs
Larson	Meredith	Research & Educational Support
Larson	Nathan	UPJ Academic Success Center


10. Larson Barry UPB Blaisdell Hall Operations

11. Larson Erica Microbiology and Molecular Gen


12. Larson Nathan UPJ Academic Success Center

12. Enter the 'Start date' and 'End date' of the project:

10. * Start date:

5/1/2019 

11. * End date:

4/30/2020 

13. Change 'Authorized' to either 'Authorized by Sponsor' (if the NOA has been received) or 'Advance Account' (if requesting an early account). ('Not Authorized' should not be used):

13. * Authorized:

Authorized by Sponsor

Advance Account

Not Authorized

[Clear](#)

14. Enter the applicable numbers for 'Direct', 'Indirect' and 'Indirect rate' and select the 'Indirect cost base type' in the drop-down list for the subaccount and click 'OK'. Then click 'Continue':

Enter sponsor awarded direct and indirect amounts:

14. Direct:

15. Indirect:

16. Total:

17. * Indirect rate (%):

18. * Indirect cost base type:

19. Salary cap:


15. On the 'Budget Reconciliation' page, 'Select the Budget Allocation to display'. There are multiple Budget Allocations if there are multiple accounts.

How to Set-up a New Award (with subaccounts) - Department

Award / Authorized Budget Reconciliation

All Allocations		Current Allocation	
Total Sponsor Awarded to Date: ?	\$60,500	Total Sponsor Awarded: ?	\$0
Total Reconciled to Date:	\$60,500	Total Reconciled: ?	\$0
Difference:	\$0	Difference: ?	\$0

Select the Budget Allocation to display: ?

None Selected 


Start Date: End Date:

16. Select the main allocation (master):

Select the Budget Allocation to display: ?

None Selected

Subaccount 1 - Eric Larson (Core A)

National Institutes of Health Award Period 1 

17. Complete the 'Budget Reconciliation' for the master budget and click 'Save'. The 'Difference' should be zero after completing all Budget Allocations:

Award / Authorized Budget Reconciliation

All Allocations		Current Allocation	
Total Sponsor Awarded to Date: ?	\$60,500	Total Sponsor Awarded: ?	\$55,000
Total Reconciled to Date:	\$60,500	Total Reconciled: ?	\$55,000
Difference:	\$0	Difference: ?	\$0 

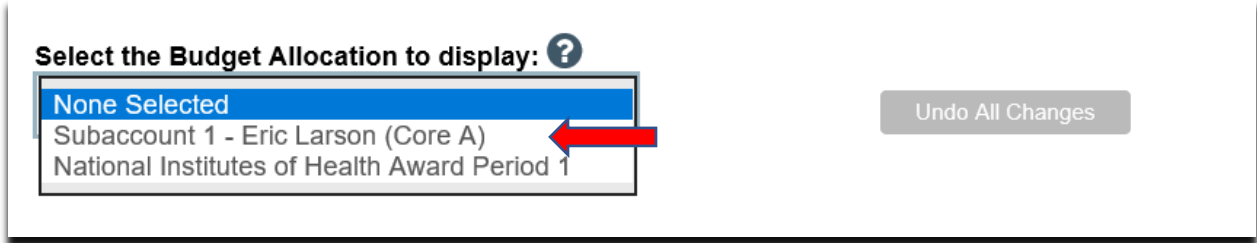
Select the Budget Allocation to display: ? National Institutes of Health Award Period 1

Start Date: 8/15/2019 End Date: 2/14/2020

Budget Categories	Baseline ?	Invert (?)	Clear	Rollup Adjustments	Adjustments	Active Allocation Total
Medical Faculty RFT Regular Earnings	5000		\$0	\$0	↑ \$25,000	\$25,000
Non-Medical Faculty RFT Regular Earnings	5100		\$0	\$0	↑ \$0	\$0
Research Associates RFT Regular Earnings	5200		\$0	\$0	↑ \$0	\$0
Staff RFT Regular Earnings	5400		\$0	\$0	↑ \$0	\$0
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		\$0	\$0	↑ \$0	\$0
Fringe Benefits-Non-Medical Faculty	5903		\$0	\$0	↑ \$0	\$0
Fringe Benefits-Research Associates	5905		\$0	\$0	↑ \$0	\$0
Fringe Benefits-Staff	5907		\$0	\$0	↑ \$0	\$0
Fringe Benefits-GSR-PHD	5913		\$0	\$0	↑ \$0	\$0

18. Select the subaccount allocation:

How to Set-up a New Award (with subaccounts) - Department



19. Complete the 'Budget Reconciliation' for the subaccount budget and click 'Save'. The Budget Reconciliation should be zero after completion in the 'Difference' box:

Award / Authorized Budget Reconciliation

All Allocations				Current Allocation			
Total Sponsor Awarded to Date:	\$60,500	Total Sponsor Awarded:	\$5,500				
Total Reconciled to Date:	\$60,500	Total Reconciled:	\$5,500				
Difference:	\$0	Difference:	\$0				

Select the Budget Allocation to display: Subaccount 1 - Eric Larson (Core A) Undo All Changes Start Date: 8/15/2019 End Date: 2/14/2020

Budget Categories	Baseline	Import	Clear	Rollup Adjustments	Adjustments	Active Allocation Total
Medical Faculty RFT Regular Earnings	5000			\$0	\$2,750	\$2,750
Non-Medical Faculty RFT Regular Earnings	5100			\$0	\$0	\$0
Research Associates RFT Regular Earnings	5200			\$0	\$0	\$0
Staff RFT Regular Earnings	5400			\$0	\$0	\$0
GSR-PHD Regular Earnings	5600			\$0	\$0	\$0
Stipend-Training Grant	5820			\$0	\$0	\$0
Fringe Benefits-General (Spon Proj) Budget only)	5900			\$0	\$0	\$0
Fringe Benefits-Medical Faculty	5901			\$0	\$0	\$0
Fringe Benefits-Non-Medical Faculty	5903			\$0	\$0	\$0
Fringe Benefits-Research Associates	5905			\$0	\$0	\$0
Fringe Benefits-Staff	5907			\$0	\$0	\$0

20. Click 'Continue' to proceed to the 'Personnel' page and enter ALL personnel for the project and remove all TBA/TBH personnel. Click 'Continue'.

Personnel

Name: National Institutes of Health Award Period 1 PI Eric Larson
 Financial Account: Year 1 Period: 1
 Start Date: 8/15/2019 End Date: 2/14/2020

Person	Role	Role Other	Start Date	End Date	Remove Row
Eric Larson	PDPi		8/15/2019	2/14/2020	X
	None				
	None				
	None				

21. 'Terms & Conditions' page will be completed by the OR, click 'Continue':

How to Set-up a New Award (with subaccounts) - Department

Terms and Conditions

1. Terms and conditions: ?

- Predoctoral Fellowship
- Modular Under Exp Auth & SNAP
- No Drawdown Pending Sponsor Approval
- Mandatory Cost Sharing
- Program Income Add/Deduct Option
- No F&A Budgeted on Subgrant
- Included Under Expanded Authorities
- Excluded from Expanded Authorities
- Program Income Additional Cost
- Delayed Receipt of Award Doc
- Modular Award
- Budget Pro-rated w/ Prior Year Budget
- Minority Supplement Restriction
- Postdoctoral Fellowship
- Pre Award Costs Approved
- Carryover Not Permitted
- Carryover w/ No Prior Approval
- Carryover w/ Prior Approval
- Subject to SNAP
- Awarded Under Expanded Authorities
- Subject to SNAP
- Program Income
- Foreign Travel Restriction
- Fringe Benefit Restriction
- FFATA

2. Special terms and conditions:

There are no items to display

22. If desired, add 'Deliverables' to send notifications to select individuals by clicking the 'Add' button and creating the deliverable. Click 'Continue':

Deliverables

1. Add deliverables: ?

Name	Due Date	Responsible Party	Status	Completion Date
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23. If applicable, complete the associated 'Compliance Review' screens and click 'Continue' at the bottom of the screen.

How to Set-up a New Award (with subaccounts) - Department

Compliance Review

1. * Human Subjects: ?

Yes No [Clear](#)

a. Will the study be conducted in UPMC space?

Yes No [Clear](#)

b. Will non-UPMC equipment be placed in UPMC space?

Yes No [Clear](#)

c. Will the study be conducted on UPMC patients?

Yes No [Clear](#)

d. Please attach UPMC fiscal approval:

[Choose File](#)

2. * Vertebrate Animals: ?

Yes No [Clear](#)

a. Please attach Grant Application Review (GAR):

[Choose File](#)

3. * Recombinant DNA: ?

Yes No [Clear](#)

4. * Hazardous Materials: ?

Yes No [Clear](#)

5. * Human Stem Cells: ?

Yes No [Clear](#)

a. Human Embryonic Stem Cells:

Yes No

24. On the 'Completed Award' page, click 'Finish':

Completed Award

In the toolbar, select "Hide / Show Errors" to validate that the form is complete. Update any errors or incomplete sections.
To complete the award setup process, click the Finish button on the right and execute an activity in the Award's workspace.

[← Back](#) [Save](#) [Exit](#) [Hide/Show Errors](#) [Print](#) [Jump To](#) [Finish](#)

25. In the award workspace, click 'Email Specialist' and create an email letting the Specialist know that the award has been updated:

How to Set-up a New Award (with subaccounts) - Department

The screenshot shows the 'Draft' workspace for an award titled 'mtr test'. The left sidebar contains a list of activities, with 'Upload Award Attachments' highlighted by a red arrow. The main area displays award details, including PDR#, Designated Reviewer (Eric Larson), Award Approver, Approving Dept./Center/Institute (Office of Research 1000), School (IVC Research), Department Administrator (Eric Marquis), Direct Sponsor (National Institutes of Health), and Prime Sponsor. It also shows current total project period commitment and award amount to date, both at \$90,500. The 'Awarded Funding Proposals' table lists one proposal with ID F9000008, Name 'mtr test', Principal Investigator 'Eric Larson', and Status 'Draft'. A red arrow points to the 'Upload Award Attachments' activity in the sidebar.

26. Return to the award workspace and upload all attachments using the 'Upload Award Attachments' activity:

This screenshot is identical to the one above, showing the 'Draft' workspace for the 'mtr test' award. The 'Upload Award Attachments' activity in the left sidebar is highlighted with a red arrow, indicating the next step in the process.

What's Next?

1. The Specialist in the Office of Research (OR) will review the award, and if acceptable, will submit the award for review to your Dean's Office.

How to Set-up a New Award (with subaccounts) - Department

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2. If approved by the Dean's Office, the award will be placed in a 'Final Review' state, and the OR will submit to Sponsored Projects Accounting (SPA) for activation.