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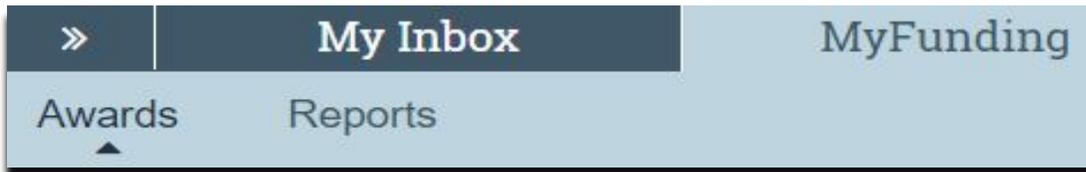
2. Search for the award in the search box and click on the name of the award:

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

4. 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 <u>not</u> save any changes made to the smartform:

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

6. 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':

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

Budget Allocations

1. Add / edit and remove budget allocations: ❓

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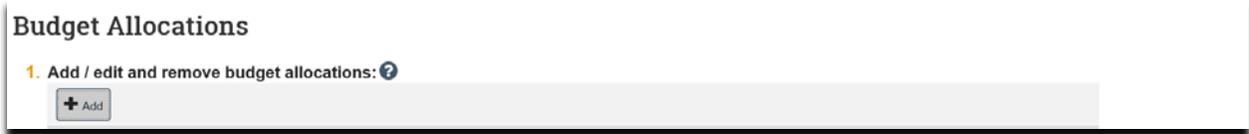
8. In box 1 'Financial Account', select the subaccount Financial Account created in step 6 (above).

Add Budget Allocation

Create or Edit Budget Allocation

1. **Financial account:**

   Subaccount 1- Eric Larson
   Subaccount 1-Eric Larson (10050) ⬅
   Subaccount 2- Natalie Merz
   Subaccount 3- Alice Lawson
   Year 1
   Year 2
   Year 3

2.
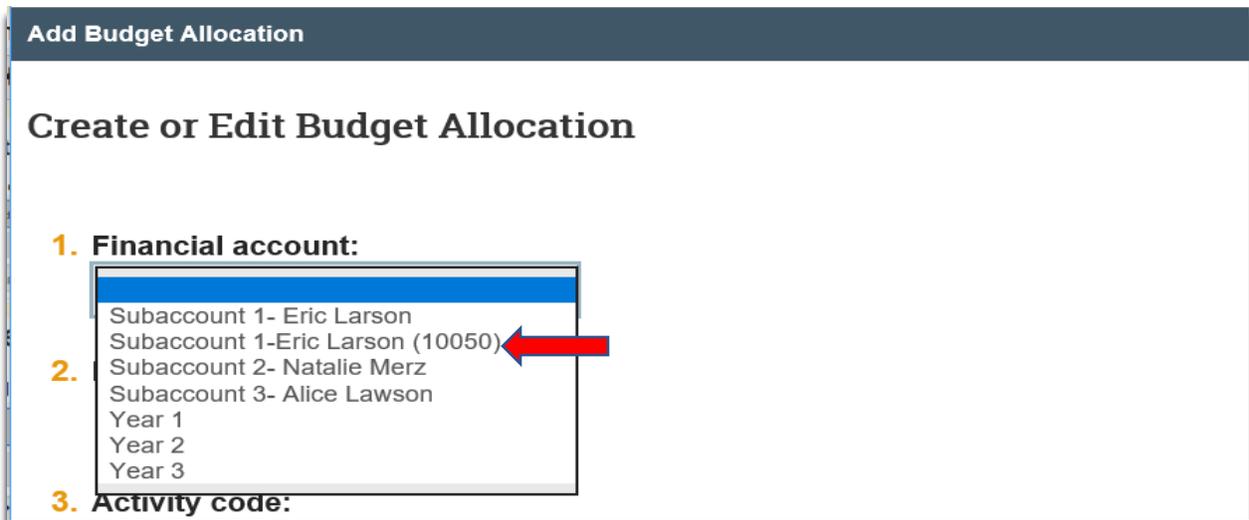
3. **Activity code:**

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

1. Financial account:

Subaccount 1-Eric Larson (10050) ▼

2. Project ID:

AWD9P003 ▼

3. Activity code:

4. Period number:

1

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:

Subaccount 1-Eric Larson (10050) ▼

2. Project ID:

AWD9P003 ▼

3. Activity code:

4. Period number:

1

5. * Name:

Subaccount 1-Eric Larson (10050) ✕

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:

8. *** Associated funding proposal:**

ID	Name	Principal Investigator
● FP00000068	mtr test	Eric Larson
Clear		

9. **PI:**

larson	✕	⋯

⊟ 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

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:
$15,000

15. Indirect:
$1,500

16. Total:
$16,500

17. * Indirect rate (%):
10

18. * Indirect cost base type:
MTDC ▼

19. Salary cap:
$0

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

16. Select the main allocation (master):

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

18. Select the subaccount allocation:

Select the Budget Allocation to display: ❓

None Selected
Subaccount 1 - Eric Larson (Core A) ⬅
National Institutes of Health Award Period 1

Undo All Changes

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	$0	†	$2,750	$2,750
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

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 ❓

1. 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		PD/PI	▼		8/15/2019	2/14/2020	X
	Find	None	▼				
	Find	None	▼				
	Find	None	▼				

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

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:

   + Add

   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: ❔

   Add

Name	Due Date	Responsible Party	Status	Completion Date

23. If applicable, complete the associated 'Compliance Review' screens and click 'Continue' at the bottom of the screen.

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:

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:

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

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.

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.