Overview: This guidance document is to assist department administrators with setting up new awards in MyFunding.
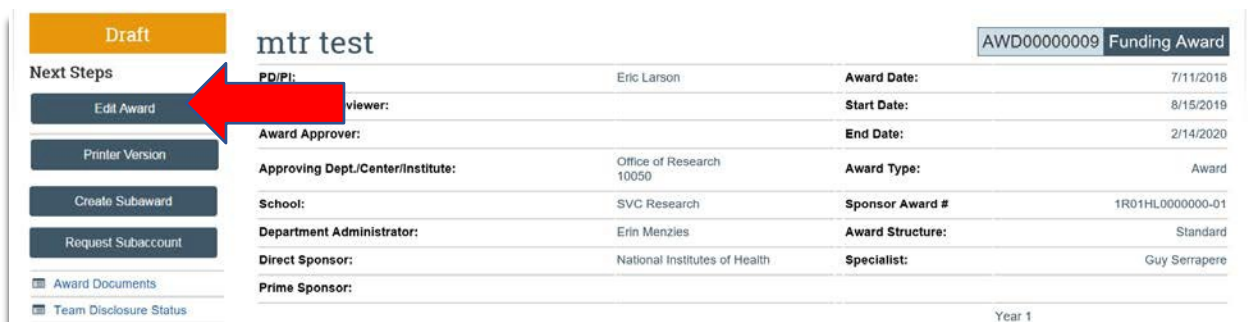
Where to Start

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. Review the Budget Allocation. Please note the following on the page: ***Activation processes have changed! Create only one budget allocation for each award period or modification. The entire awarded dollar amount should be reconciled into Subcode 8130. Subaccount activations are processed separately.***

6. On the 'Budget Reconciliation' SmartForm, use the menu 'Select the Budget Allocation to display' to designate the period to be reconciled.

7. Select the allocation:

Select the Budget Allocation to display: ❓

| None Selected | ▼ | Undo All Changes |

None Selected
National Institutes of Health Award Period 1

8. Complete the 'Budget Reconciliation' and click 'Save'. All funds should be entered into the **Budget Unallocated-Sponsored Projects Only 8130** subcode. The 'Difference' should be zero after completing the Budget Allocation. Once the account is activated process a BMR with SPA to allocate funds to the desired subcodes.

All Allocations

Total Sponsor Awarded to Date: ❓	$1,124,986
Total Reconciled to Date:	$1,124,986
Difference:	$0

Current Allocation

Total Sponsor Awarded: ❓	$264,146
Total Reconciled: ❓	$264,146
Difference: ❓	$0

Budget Unallocated-Sponsored Projects Only	8130	$0	$0	$264,146

9. Click 'Continue' to proceed to the 'Personnel' SmartForm 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: 1/1/2022 End Date: 12/31/2022

Person		Role ❓	Role Other
[ ]	Find	None ▼	[ ]

10. 'Terms & Conditions' SmartForm will be completed by OSP, 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

11. If applicable, complete the associated 'Compliance Review' SmartForms 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:

12. 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

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

✉ Email Specialist

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

📎 Upload Award Documents

What's Next?

1. The Specialist in the Office of Sponsored Programs (OSP) 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 OSP will submit to Sponsored Projects Accounting (SPA) for activation.