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COURSE 3. MAINTAIN AWARDS

I. CHANGE IN SPONSOR

If an award was generated, but the contract was set up with the wrong sponsor, the contract needs to be closed and a new proposal set up.

Sten	Action
1.	Close the contract.
2.	Create a new proposal with the correct sponsor.



II. NO LONGER PRE-AWARD SPENDING

If an award start date has been reached and documentation has been received but the rate or base was incorrectly set up, neither can be changed in the Huron Research Suite (HRS) system and integrated into UCF Financials. If these values need to be changed, a support ticket must be opened, and the values must be manually updated in UCF Financials. Note that the funded facilities and administrative rate percentage can be altered in HRS and will be integrated into UCF Financials. To change the rate or base, do the following to allow billing to be processed. (Contact HRS to ensure changes have been made there.)





	Project Activity
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value Add a New Value
	▼Search Criteria
	Business Unit
	Project begins with T
	Activity begins with 🔻
	WBS ID begins with v
	Project Description begins with v
	Activity Description begins with
	Activity Type begins with V
	Processing Status = V
	Activity Owner begins with v
	Include History Correct History Case Sensitive
3.	Click Search.
	Include History Correct History Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria
4	To undate $F\&A$ information select the FA Rates tab
т.	To update T &A information, select the FA Kates tab.
	Favorites • Main Menu • > Grants • > Project Activity
	Constral Information Definition FA Dates Location Attachments Quality Lloss Fields Dates Durlast Alada Asset Integration Dulas
	General mormation Deminuon EA Rates Education Attachments Quality OseE Fields Rates Budget Alens Asset (meghation Rules
5.	Add new rows as needed. Enter the following:
	F&A Rate Info
	Escilition Admin Data (select componentiate rate)
	Facilities Admin Rate (select appropriate rate)
	Institution
	Institution
	FA Base*
	F&A Rate Info Find View All First ④ 1 of 1 ④ Last
	Facilities Admin Rate ORSON Q Org Res On
	Institution
	Institution Rate Find View All First (1) 1 of 1 (2) Last
	FA Base TDC C Eff Date 07/01/2017 B FA Rate % 49.00 + -



	*FA Base	Description
	MTDCA	Modified Total Direct Costs
	MTDC	MTDC - Equip Capital TH >= 1 K
	TDC	Total Direct Costs
	SW	Salaries & Wages
	SWB	Salaries, Wages, & Fringe
6.	Click Save.	
7.	Set up the Contract Line according the apprefer to the following sections of "Course 2 Navigation for Grants" manual: • "I. Set Up & Activate a CRB Contra	propriate system procedure. For guidance 2. Set Up Contracts" in the "System act"
	 "II. Set Up & Activate an LOC Con "III. Set Up & Activate a Fixed Price 	itract"
	• "X. Set Up & Activate a NOBILL C	Contract"



III. UPDATE CHARTFIELD ATTRIBUTES

If an award and Project have been set up but ChartField Attributes differ from the logic driven values, complete the following steps to ensure that reports can be properly generated:

Step	Action
1.	Navigate to Main Menu > Set Up Financials/Supply Chain > Common Definitions
1	• Design ChartFields > Define Values > ChartField Values.
	KullCE Financials
	Favorites + Main Menu +
	Search Menu: Personalize Content
	Image: Employee Self-Service Image: Self-Service Image: Self-Service Image: Self-Service Image: Self-Service Image: Self-Service Suppler Contracts Image: Self-Service Image: Self-Service Suppler Contracts Image: Self-Service Image: Self-Self-Self-Self-Self-Self-Self-Self-
	initialing pages Accounts Payable Image: Shipping and receiving in Control classes Asset Management Image: User Preferences Image: User Preferences Image: Commitment Control Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions Image: Common Definitions
2.	Click the Project link. ChartField Values
	ChartField Values
	You do not have security privileges to access the ChartFields that are not hyperlinks.
	Account
	Department
	Project
	Fund Code
	Program Code



3.	On the Project ID page enter values into the following fields:
	a) SetIDb) Project
	Project ID Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Add a New Value
	SettD = Project begins with Description begins with Correct History Case Sensitive
4.	Click Search.
	Search Clear Basic Search
5.	Click the Attributes link. The ChartField Attributes dialog box displays.
	Project Project
	Setup UCF01 Project 18558A01 *Description Desity Study *Status Active ▼ *Start Date 06/08/2019 Integration UCF01
	*End Date 08/28/2025 🛐 Summary Project
6.	Enter or adjust the following ChartField Attributes and the appropriate ChartField Attribute Value .
	 a) BE b) EF c) EP d) FID e) SF
	t) SP_OPT g) SP_STD h) VPOrg

UCF Financials

System Navigation for Grants

	ChartFie	eld Attribute Valu	es				Persor	alize Find	View All 🛛 🔜 First 🕢 1-6	of 8 💽	Last
	SetID	ChartField Value	Effective Date	Field Name	*ChartField Att	ribute	ChartField Attribut	e Value	Attribute Value Description		
	UCF01	18558A01	01/01/1900	PROJECT_ID	BE	٩	48900700	٩	Contracts and Grants	+	-
	UCF01	18558A01	01/01/1900	PROJECT_ID	EF	٩	2	٩	Restricted Current Funds	+	-
	UCF01	18558A01	01/01/1900	PROJECT_ID	EP	٩		٩		+	-
	UCF01	18558A01	01/01/1900	PROJECT_ID	FID	Q	655005	Q	Sponsored Research Development Trust Fund UCF	+	-
	UCF01	18558A01	01/01/1900	PROJECT_ID	SF	Q	2	٩	Trust Fund	+	-
	UCF01	18558A01	01/01/1900	PROJECT_ID	SP_OPT	Q	000000	Q	Education and General Activities	+	
C	lick (Cancel	Cancel								
C [C	lick C)K.)K. ave.	Cancel								
C [C	lick (Cancel DK. K	Cancel]					
C [[C	lick C lick S Projec	DK. DK. Save.	Cancel								
	lick (lick S Projec	Cancel DK. X Save. t setID U	Cancel								
	Elick C Elick S Projec	Cancel DK. DK Cancel Cancel C	Cancel CF01								
	elick C elick S Projec Projec	Cancel DK. X Save. t SetID U4 Project 18 :ription Ob	CF01 3558A01 iesity Stud								
	elick (elick S Projec *Desc *Sta	Cancel DK. X Save. t SetID Un Project 18 cription Ob urt Date 06	CF01 3558A01 iesity Stud	ly] [1]							



IV. PROJECT STATUS

The Project Status defaults to Open when an award is generated to allow transactions to be posted. If transactions need to be stopped on a project, the status can be updated to reject certain analysis types. When the Project Status needs to be changed to ensure that transactions are confined to the allowability of the status, complete the following steps:

Step	Action
1.	Navigate to Main Menu > Project Costing > Project Definitions > Status.
	Advanced Search
	Favorites - Main Menu -
	Search Menu:
	Departmental Authorization
	The menu is not Gustomers Annual Contracts
	Highlights Order Management
	Recently Used
	appear under ti 🛄 Suppliers 🔸
	Purchasing
	eProcurement
	Grants
	your navigation Project Costing
	you access to t Proposal Management Activity Definitions
	Billing Iransaction Definitions
	Accounts Receivable
2.	 Enter values in the following fields: a) Business Unit b) Project (Project ID)
	Status
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value
	Search Criteria
	Project begins with V
	Description begins with V
	Program = V Detail Project V
	Processing Status = V
	Include History Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria



3.	Click Search. (See image in previous step.)
4.	Click the plus sign (+) to add an additional row.
	Status Project 00000017 Description Program income
	Project Status Find View All First () 1 of 1 () Last
	Effective Date 07/01/2019 Sequence 0
5.	 Enter values in the following fields: a) Effective Date b) Sequence (previous value can be increased by one if the Effective Date needs to be the same) c) Status
	Status Project 00000017 Description Program income Project Status
	Project Status Find View All Effective Date 10/09/2019 *Status Open Priority 0
	Comments
	Save 🕅 Return to Search 🕇 Previous in List 4 Next in List 🖾 Notify 📿 Refresh 🖉 Update/Display
6.	Click Save. (See image in previous step.)
7.	When a project reaches its End Date , the status should be updated to Prepare for Closeout to stop all transactions with the COM , GCA , and REQ analysis types.
8.	For closeout procedures refer to the "System Navigation for Grants" manual, "Course 3. Maintain Awards," section "XVI. Close Award, Project, & Activity."





V. ADD INCREMENTAL FUNDING ON EXISTING CONTRACT LINE

When additional funds need to be added to a project with an active contract in which the Contract Line and Project have been set up, complete the following steps to ensure that transactions can be posted to the project:

Sten	Action
1.	Begin by altering the Project Budget. Refer to the "System Navigation for Grants" manual, "Course 1. Establish Awards," section "VI. Establish & Post Grants Award Budget" to add additional funding lines.
2.	Navigate to Main Menu > Grants > Awards > Award Profile.



T avontes +	Main Menu 👻
N	Search Menu:
Top Menu Featu	()
	Employee Self-Service
The menu is nov	Manager Self-Service
Main Menu to g	Supplier Contracts
Highlights	Departmental Authorization
Recently Used	Customers
menu, located a	Customer Contracts
	items
	Suppliers
Breadcrumbs	Purchasing
your navigation	eProcurement
subfolders.	Services Procurement
	Grants Costing Protositis
	Propert Custing Awards Award Profile
Menu Search, the Main Menu	Billing Distitutions
type ahead whi	Accounts Receivable Sponsored Projects Off Project Activity
mong pages n	Accounts Payable
	Asset Management Professionals Project Budget Inguiny Commitment Control Errors
	Banking Sponsors Communicate Control Envis
	Cash Management Guidelines Guidelines Guidelines Admin
(Alternate Amendm Enter valu	ly, navigate to Main Menu > Customer Contracts > Create and A ent Details.) les into the following fields:
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(Alternate Amendm Enter valu a) Bu b) Pr	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) les into the following fields: isiness Unit oject (Project ID) Main Menu • > Grants • > Awards • > Award Profile
(Alternate Amendm Enter valu a) Bu b) Pr	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) les into the following fields: usiness Unit oject (Project ID)
(Alternate Amendm Enter valu a) Bu b) Pr	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) les into the following fields: usiness Unit oject (Project ID) Main Menu • > Grants• > Awards• > Award Profile ile
(Alternate Amendm Enter valu a) Bu b) Pr Favorites • Award Pro Enter any info	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) tes into the following fields: usiness Unit oject (Project ID) Main Menu • > Grants • > Awards • > Award Profile file mation you have and click Search. Leave fields blank for a list of all values.
(Alternate Amendm Enter valu a) Bu b) Pr Favorites • Award Pro Enter any info	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) les into the following fields: usiness Unit oject (Project ID) Main Menu • > Grants • > Awards • > Award Profile File mation you have and click Search. Leave fields blank for a list of all values. sting Value Add a New Value
(Alternate Amendm Enter valu a) Bu b) Pr Favorites ~ Award Pro Enter any info Find an Ex Search	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) les into the following fields: usiness Unit oject (Project ID) Main Menu Grants Awards Awards Award Profile file mation you have and click Search. Leave fields blank for a list of all values. sting Value Add a New Value Criteria
(Alternate Amendm Enter valu a) Bu b) Pr Favorites • Award Pro Enter any info Find an Ex • Search	ly, navigate to Main Menu > Customer Contracts > Create and A ent Details.) these into the following fields: usiness Unit oject (Project ID) Main Menu → Grants → Awards → Award Profile file mation you have and click Search. Leave fields blank for a list of all values. sting Value Add a New Value Criteria
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(Alternate Amendm Enter valu a) Bu b) Pr Favorites • Award Pro Enter any info Find an Ex • Search	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) tes into the following fields: usiness Unit oject (Project ID) Main Menu Grants Awards Awards Award Profile file mation you have and click Search. Leave fields blank for a list of all values. sting Value Add a New Value Criteria usiness Unit UCF01 Award ID begins with UCF01
(Alternate Amendm Enter valu a) Bu b) Pr Favorites - Enter any info Find an Ex Search	ely, navigate to Main Menu > Customer Contracts > Create and A ent Details.) tes into the following fields: usiness Unit oject (Project ID) Main Menu Grants Awards Awards Award Profile file mation you have and click Search. Leave fields blank for a list of all values. sting Value Add a New Value Criteria usiness Unit UCF01 Award ID begins with UCF01
(Alternate Amendm Enter valu a) Bu b) Pr Favorites - Award Pro Enter any info Find an Ex Search	<pre>dy, navigate to Main Menu > Customer Contracts > Create and A ent Details.) tes into the following fields: tsiness Unit oject (Project ID) Main Menu Grants Grants Awards Awards Award Profile file tsing Value Add a New Value Criteria usiness Unit UCED1 Award ID Degins with Contract Described begins with Contract Contracts Cont</pre>
(Alternate Amendm Enter valu a) Bu b) Pr Favorites - Award Pro Enter any info Find an Ex Search	Hy, navigate to Main Menu > Customer Contracts > Create and A ent Details.) tes into the following fields: tsiness Unit oject (Project ID) Main Menu Grants Awards Award Profile tile traition you have and click Search. Leave fields blank for a list of all values. sting Value Add a New Value Criteria usiness Unit = UCF01 Award ID begins with Project begins with
(Alternate Amendm Enter valu a) Bu b) Pr Favorites • Award Pro Enter any info Find an Ex • Search	Aly, navigate to Main Menu > Customer Contracts > Create and A ent Details.) tes into the following fields: usiness Unit oject (Project ID) Main Menu
(Alternate Amendm Enter valu a) Bu b) Pr Favorites - Award Pro Enter any info Find an Ex Search	Aly, navigate to Main Menu > Customer Contracts > Create and A ent Details.) these into the following fields: Isiness Unit oject (Project ID) Main Menu



4.	Click Search.
	Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria
5.	Click the View Contract link.
	Favorites V Main Me Award Eunding R Referenc
	View Contract P Associated Project
6.	Select the Amendments tab.
	General Lines Amendments
	Contract Number
7	Click the Amend Contract button
/.	Click the Amend Contract button.
	General Lines Amendments
	Contract Number 00000 Amendment Number 00000
	Amend Contract







	Contr Business	act 0000005668 Unit UCF01					Amendme	ent 000000013		
	Sol	d To CNG50026	University of Florid	а		Δπ	Amendment Ty	pe CONTRICOM on CONTRING		
	τ	030								
Contract B	silling 🛞									
	Tot	al Billing Adjustment		0.00		Ur	allocated Billin	g	0.00	
	Total Bill	ling After Adjustment	1,451,	248.00						
Fixed Billin	ng 🕐									
	Fixe	d Billing Adjustment		0.00	Unal	located Fixe	d Billing		0.00	
	(Discount / Surcharge		0.00	Inclusive I	Prepalde Adj	ustment		0.00	
		Net Adjustment		0.00		AI	location (Incom	plete	V	Recalcula
Contract L	ine Pricin	g 🕐								
Amounta	Detall									
Retrieve Billing Price	Line Number	Product	Current Billing Limit	New Billing Limit	Adjustment Billing Limit	Current Billing Amount	New Billing Amount	Adjustment Billing Amount	Adjust Billing Retroactively	Adjust Revenu Retroactively
	1	COST_REIMB	363,170.02	363,170.02						
	2	COST_REIMB	134,402.31	134,402.31						
	3	FIXED_AMOUNT	151,041.88	181.0 1.88			0.00			
	16	AS_INCURRED		0.00						
Select All		Clear All								Recalcula
Adjustmer	nt Line Tot	tals 🕐								



14.	Under the Adjustment Line Totals heading, verify that the Total Billing and Billing Limit (for AS_INCURRED and FIXED_AMOUNT) are equal.
	Select All Clear All Recalculate
	Adjustment Line Totals 👔
	Billing Amount 0.00 Recurring Billing 0.00
	Discounts/surcharges 0.00 Billing Limit 0.00 Total Billing 0.00
15.	Click Save.
	Prepaids
	Return to Amendment Details
	Return to Search Notify Return to Search
16.	Click the Return to Amendment Details link.
	Prepaids
	Return to Amendment Details
	E Sava St. Patura to Search
17.	Under the Amendment Details heading, verify the Total Billing Adjustment.
	Amendment Details
	Contract 0000005668
	Sold To Customer CNG50026
	Amendment Type CONTR CONV
	Amendment Reason CONTR LN CONV V
	Total Billing Adjustment
	Fixed Billing Adjustment 0.00
18.	Update the Amendment Status to Ready.
	*Drocess Date 10/01/2019
	*Amendment Status Pending
	Cancelled
	Total Revenue Adjustment Ready
	Fixed Revenue Adjustment 0.00
	Fixed Revenue Allocation Complete



19.	Click Save.						
	Amendment Amo	unt Allocation					
	Return to Genera	I Information					
	🔚 Save 🔯	Return to Searcl	h 🖹 Notify				
20.	Click Process	Amendmen	it.				
	Amendment Details	\$					
	Contrac	t 0000005189		Amendment N	umber 0000000018		
	Sold To Custom	er CNG50009					
	Amendment Ty	pe Contract Adjustment		Proce	ss Date 10/14/2019		
	Amendment Reas	on New Project Added		"Amendmen	Status Ready	Process	Amendment
	Total Billing Adjustme	ent 0.00	Т	otal Revenue Adju	stment 0.00		
	Fixed Billing Adjustme	ent 0.00	F	ixed Revenue Adju	stment 0.00		
	Additional Amendment	on Incomplete nt Details		Fixed Revenue All	ocation incomplete		
	Reference	ID	₽	Use	r Ref #1 r Ref #2		
	Amendment Component General Statistics	s D			Personalize Fin	d View All 🖓 📴 First 🕚	1-3 of 3 🛞 Last
	Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value	
	1 Contract Header	Line 4	Standalone	Update		N	
	2 Contract Header	Line 4	Hold Billing	Update		N	
	3 Contract Header	Line 4	Hold Revenue	Update		Ν	
	Return to General Information		Internal Notes				
	Return to Sea	rch 🔄 Notify					
	Note: If it is a j	fixed amoun	t contract, g	go to the	Events pag	e and create add	litional
	billing events f	or the total of	adjustment.	Refer to	the "System	n Navigation for	Grants"
	manual, "Cour	rse 2. Establ	lish Awards,	" section	n "III. Set U	Up & Activate a	Fixed Price
	Contract" for a	details on cr	eating billir	ng events		•	
21.	Click Save. (Se	ee image in	previous ste	p.)			



VI. REDUCE BILLING LIMIT BELOW EXPENDITURES FIXED

Transactions need to be taken off the project, and in cases where the contract has billed more than allowable, a credit event needs to be issued and AR maintenance to allow for the award billing limit to be reduced. Follow these steps:

Step	Action	
1.	Remove 1	project expenditures down to the amount of allowable spending.
2.	Navigate	to Main Menu > Grants > Awards > Award Profile.
	UCF Fi	nanctals Navigator 💌 Search 🔗 Advanced Search myUCF
	Equaritae	Main Manu
	Favorites +	Main wenu V
		search wenu.
	Top Menu Featu	↓ · · · · · · · · · · · · · · · · · · ·
		Employee Self-Service
	The menu is nov	Gamma Manager Self-Service
	Main Menu to g	Supplier Contracts
	Highlights	Departmental Authorization
	Recently Used	Customers
	appear under th	Customer Contracts
	menu, locateu i	Order Management
		Litems
		Suppliers
	Breadcrumbs	Purchasing Purchasing
	your navigation you access to t	e erocurement
	subfolders.	Services Procurement Sponsor Websites
		Proposals
		Proposal Management Awards
	Menu Search, the Main Menu	E Institutions
	type ahead whi	Accounts Receivable
	tinding pages n	Accounts Payable
		Asset Management Professionals Project Budget Inquiry
		Banking Sponsors Commitment Control Errors
		Cash Management Subrecipients Regulate Award
		Commitment Control Interactive Reports Process Facilities Admin
	(Alternate	ely, navigate to Main Menu > Customer Contracts > Create and Amend >
	Assign B	illing Dian > Define Billing Blan > Events tob)
	Assign D	ning I fan > Denne Dining I fan > Events (a0.)
3.	Enter val	ues into the following fields:
	a) B	usiness Unit
	1) D	
	b) P 1	roject (Project ID)
	b) P 1	roject (Project ID)



Favorites Main Menu Grants Awards Award Profile
Award Profile
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value
Search Criteria
Business Unit = UCF01
Project begins with
PI ID begins with Proposal ID begins with
Reference Award Number begins with
Case sensitive
Click Search.
Case Sensitive
Search Clear Rasis Search 📴 Save Search Criteria
Search Clear Basic Search 🖾 Save Search Criteria
Search Clear Basic Search Save Search Criteria Click the View Contract link. The General Information page opens.
Search Clear Basic Search Save Search Criteria Click the View Contract link. The General Information page opens. Favorites - Main Me
Search Clear Basic Search R Save Search Criteria
Search Clear Basic Search R Save Search Criteria
Search Clear Basic Search Reference Save Search Criteria
Search Clear Basic Search Save Search Criteria Click the View Contract link. The General Information page opens.
Search Clear Basic Search Save Search Criteria Click the View Contract link. The General Information page opens.
Search Clear Basic Search Reference
Search Clear Basic Search Save Search Criteria



	r									
6.	Click the	e Billing Plan	s link.							
	_კ ჩუ <mark>Oth</mark>	er Information								
	Summary of Amounts (?) Billing Plans Revenue Plans Return to Award Profile									
	Return to	Award Profile								
	R Save	e 🔯 Return to	Search Notify							
	General	Lines Amendme	nts							
7	On the A	Assion Rilling	Plan nage sele	et the link	in the P	lan co	umn of the Line	that		
7•	needs ac	ljustments.	, i ian page, sere					, tildt		
	Favorites -	Main Menu 👻	> Grants 🗸 > Awar	rds v ⇒ Awa	rd Profile 👩 >	General	Information > Assign Billing	Plan		
	Accien F	Dilling Dian								
	Assign E	Contract RECO	NV0326 COM INT		amic Cont					
		Sold To Customer Arnold	P. Gold Foundation, The	NAL MED-NI .Dyn						
	Contract	Lines to be Assigned /	Unassigned	Billing Amount	Price Type	Plan	Plan Description	Pers		
		COST REIMB	Direct Expenses	Dining Antouri	Rate	B101	8495/COST_REIMB Bill Plan			
	2	COST_REIMB	INDIRECT_EXP		Rate	B101	8495/COST_REIMB Bill Plan			
	3	COST_REIMB	CONVERSION		Rate	B102	- 8495/COST_REIMB Bill Plan			
	4	MATCH	Direct Expenses		Rate	B103	8397/MATCH Bill Plan			
	5	AS_INCURRED	As Incurred		Rate	B104	As Incurred			
8.	Select th	e Events tab.								
	Billing	Dian General	Events History]						
	Dining									
			4							
0	Cliate A									
9.	Click A	dd New Even	ι.		_					
9.	Click A	dd New Even	vents <u>H</u> istory							
9.	Click A	dd New Even	vents History)						
9.	Click A	Id New Even Plan General Ev C Sold To Cu	vents <u>H</u> istory ontract RFCONV0326 stomer CNG50549)						
9.	Click A	Idd New Even Plan <u>G</u> eneral Ev C Sold To Cu Billir	ents <u>H</u> istory ontract RFCONV0326 stomer CNG50549 ng Plan B104	;						
9.	Click A	dd New Even Plan <u>G</u> eneral Ev C Sold To Cu Billir	ents <u>History</u> ontract RFCONV0326 stomer CNG50549 ng Plan RB104	; (Event						



10.	 a) Define Events [Amount] b) Event Type [Date] c) Event Status [Ready] d) Event Date (Enter the day the line will be billed.) e) Amount (Credit event to reduce the amount billed to allowable amount.)
	Define Events Amount Detail Percent Amount Add Milestone Total Amount 0.00 Remaining Percent 100.0000000 Remaining Amount 0.00
	Personalize Find I II Personalize Find II II Event Date Event Event Status Event Date Amount 1 Date Pending 10/01/2019 Event Note 0.00 III Return to General Information If Return to Search Notify IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
11.	Create another billing event for the same amount as the credit event on step 10, but do not set it to Ready .
12.	Click Save. Return to Assign Billing Plan Save Return to Search Billing Plan General Events History
	Note: The remaining amount is what the Billing Limit will be reduced by, which is important to complete the Bill Plan .
13.	Refer to the "System Navigation for Grants" manual, "Course 4. Process Billing," "Unit 3. Billing Activity," sections "III. Generate an Event Bill" and "V. Generate Single Action Invoices."







16.	Click Search.
	Case Sensitive
	Darmhan Daris Carrie Darmh Oiltain
	Search Clear Basic Search 🖾 Save Search Criteria
17.	Click the View Contract link. The General Information page opens.
	Favorites Main Me Award Eunding
	Referenc
	View Contract P Associated Project
18.	Select the Amendment tab.
	General Lines Amendments
	Contract Numbe
	Amendment Numbe
19.	Click the Amend Contract button.
	General Lines Amendments
	Contract Number 00000
	Amendment Number 00000
	Amend Contract







	ent Billing All	location Amendment	t <u>R</u> evenue Allocation							
	Contr Business	ract 0000005668 Unit uccent					Amendme	nt 000000013		
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32.	Click Save. (See image in previous step.)
33.	To adjust the budget to equal the allowable amount, refer to the "System Navigation for Grants" manual, "Course 1. Establish Awards," section "VI. Establish & Post Grants Award Budget."
34.	Note: Budget lines should never be deleted after they have been finalized. Create new lines and negative amounts to reduce budget lines when necessary.



VII. REDUCE BILLING LIMIT BELOW EXPENDITURES AS INCURRED

Transactions can be taken off a project or a credit invoice generated. When an award billing limit has been reduced, follow the steps below to reflect the change in UCF Financials. This will allow the project to be closed out in the future.

Step	Action						
1.	Remove project expenditures down to the amount of allowable spending. To process the removal of expenditures, refer to the following sections of the "System Navigation for Grants" manual:						
	 <i>"Course 1. Establish Awards"</i> <i>"VI. Establish & Post Grants Award Budget"</i> 						
	 <i>"Course 4. Process Billing," "Unit 3. Billing Activity"</i> <i>"I. Generate Cost-Reimbursable Bills"</i> <i>"V. Generate Single Action Invoices"</i> 						
2.	Navigate to Main Menu > Grants > Awards > Award Profile.						
	Weighter The Search Maxingator The Search Multiple Search myUCF Favorites The Search Main Menu The Search Multiple Search Multiple Search						
	Top Menu Featu						
	The menu is no Manager Self-Service Main Menu to g Supplier Contracts						
	Highlights Image: Construct and the image: Constru						
	Breadcrumbs Suppliers your navigation Pruchasing vour access to subfolders. Services Procurement Grants Sponsor Websites						
	Image: Project Costing Image: Project Costing Image: Project Costing						
	Asset Management Asset Management Banking Commitment Control Errors Cash Management Subtrecipients Negotiate Award						
	Commitment Control						
	(Alternately, navigate to Main Menu > Customer Contracts > Create and Amend > Amendment Details.)						



Sten	Action
3.	Enter values in the following fields:
	a) Business Unit b) Brainest (Brainest ID)
	D) Project (Project ID)
	Award Profile Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value Add a New Value
	Award ID begins with Project begins with
	PIID begins with PIID begins
	Proposal ID_begins with ▼ Reference Award Number begins with ▼ Case Sensitive
4.	Click Search.
	Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria
5.	Click the View Contract link.
	Favorites - Main Me
	Award Eucline P
	Referenc
	View Contract
	P
	Associated Project



Action						
Select the Am	endments tab.					
General Li	nes Am <u>e</u> ndments Contract Numbe Amendment Numbe					
Click the Amend Contract button. General Lines Amendments Contract Number 00000 Amendment Number 00000 Amend Contract Enter values into the following fields: a) Amendment Type [Contract Adjustment]						
Amenderente		Porcer	alize L Find L Mow All			
General Stati	stics Billing Amended Amounts	Revenue Amended Amounts Misc.				
Amendment	Amendment Type	Reason	*Process Date			
000000013	Contract Adjustment	New Project Added	10/01/2019			
000000012	CONTR CONV	CONTR LN CONV	07/23/2019			
Click Save.						
000000004	ARGIS Interface Chg					
Billing Plans Return to Award	Revenue Plans Profile Return to Search The Notify Amendments					
	Action Select the Am General Lin General Lin General Lin General Lin C Amen Amen b) Reason Enter values in a) Amen b) Reason Click Save Click Save.	Action Select the Amendments tab.	Action Select the Amendments tab.			







Sten	Action
14.	Verify the Total Billing and Billing Limit.
	Select All Clear All Recalculate Adjustment Line Totals @
15.	Click Save. Prepaids Return to Amendment Details Return to Search IN Notify Previous tab IN Next tab
16.	To adjust the budget to equal the allowable amount, refer to the "System Navigation for Grants" manual, "Course 1. Establish Awards," section "VI. Establish & Post Grants Award Budget."
17.	Note: Budget lines should never be deleted after they have been finalized. Create new lines and negative amounts to reduce budget lines when necessary.



VIII. PERFORM LIMIT CHECKING

The Billing Limit has been altered enough to ensure the over-the-limit (OLT) lines fall within the limit. Before billing can be processed, the Contract Line needs to be repriced. To do so, follow these steps:





Sten	Action
3.	Click Search.
	Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria
4.	Select the correct award if it doesn't default.
5.	Click the View Contract link.
	Favorites - Main Me Award Eunding Referenc View Contract P Associated Project
6.	Select the Lines tab.
	General Lines Amendments



On th	n D	atail tab u	ndor tha	anti	root Li	inas ha	adina sa	loot the	Contro	ot Torm
unda	n tha	Controot	t Torma h	-onu		mes ne	aunig, se		Contra	ct rerm
under	i the	Contrac	t terms n	eaun	ig.					
Ge <u>n</u> eral	Lines	Amendments								
	Contrac	ct Number 0000005668		Sold	To Customer Ur	iversity of Florida				
	Amendmer	nt Number 0000000012		Co	ntract Status AC	CTIVE				
	Amend Co	intract								
Contrac	t Lines 🧃)	Development Details				Personalize	Find View All 🖪	📑 First 🕢	1-12 of 12 🛞 Last
Actions	Line	Product	Revenue Amount Details	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Nar
- Action	18	1 COST REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
= Action		2 COST REIMR	Direct Expenses	Pata	Completed	In Progress	Contract Torms	Distribution	Internal Notes	Liniversity of Elorida
	15			Rate	Completed	in rigitess	Contract Terms	Distribution		
	15	3 COST_REIMB	INDIRECT_EXP	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	15	4 COST_REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	ns	5 COST_REIMB	Direct Expenses	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
← Action	ns	6 COST_REIMB	INDIRECT_EXP	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	ns	7 COST_REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	ns	8 COST_REIMB	Direct Expenses	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	ns	9 COST_REIMB	INDIRECT_EXP	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	ns	10 COST_REIMB	SUBCONTRACT01	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	ns	11 AS_INCURRED	As Incurred	Rate	In Progress	Ready	Contract Terms	Distribution	Internal Notes	University of Florida
- Action	15	12 AS_INCURRED	As Incurred	Rate	In Progress	Ready	Contract Terms	Distribution	Internal Notes	University of Florida
					4					Þ
Click	ted Pro	rform Lin	nit Check	ing.			Sold To	Customer U	Iniversity of F	lorida
	An	nendment Numb	per 0000000012				Contr	ract Status A	CTIVE	
		Contract Lir						Price Type R	ate	
		Produ Descriptio	ct As Incurred	RED				inco ijpo in		
	Amen	id Contract								
DC Rusiness Unit UCE01 Transaction Limits Peview Limits										
		PC Business	Unit UCF01		Q	Transa	action Limits		Revi	ew Limits



IX. RUN PRICING

If the billing limit change is altered enough to ensure some OLTs fall within the billing limit and many contracts need to be repriced, do the following to process billing:

Step	Action
1.	Navigate to Main Menu > Project Costing > Utilities > Pricing.
2.	Enter the Run Control ID (user defined).
3.	Click Search.
4.	Set up the Run Control as follows: a) Option [Business Unit/Project/Activity] b) Business Unit c) Project d) Activity e) Date Option [All] Application Options a) Reprice Rows [Check] b) Price unpriced Rows [Check] c) Recalculate Tiered Pricing [Check] Pricing Options a) Cost [Check] b) Billing [Check] c) Revenue [Check]
5.	Click Save.
6.	Click Run.
7.	Click OK.



X. UNOFFICIAL BUDGETARY INCREASE: MULTIPLE PROJECTS, ONE CONTRACT LINE

If a department requested that the budget be amended before an award modification is approved, the department must be willing to take the financial risk if the amendment is not approved. The project that will have a budget entered preemptively needs to be moved to a separate contract line to ensure the allowable amounts for all projects can be billed to completion without overbilling any of the projects. An HRS mod will be done to add budget to a project and flag the project as an advance account. Manual intervention is required to move the project to a new contract line. Note that the project must be BILLED and have no BILs on the project before it is moved to a new contract line. Do the following to allow the department to continue to charge to the project (only year one of the funding will be billable):





Sten	Action
2.	Enter values in the following fields:
	b) Project (Project ID)
	Favorites → Main Menu → Grants → Awards → Award Profile
	Award Profile Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value Add a New Value Search Criteria
	Business Unit = UCF01 Q Award ID begins with Project begins with Description begins with PI ID begins with
	Proposal ID begins with Reference Award Number begins with Case Sensitive
3.	Click Search.
	Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria
4.	Click the View Contract link.
	Favorites Main Me Award Eunding
	Referenc
	View Contract P Associated Project
	Associated Project



Sten	Action								
5.	Select the Amendments tab.								
	General Lines Amendments								
	Contract Number								
	Amendment Number								
6.	Click the Amend Contract button.								
	General Lines Amendments								
	Contract Number 00000								
	Amendment Number 00000								
	Amend Contract								
	Americi Contract								
7.	Click View All.								
8.	Enter values into the following fields:								
	a) Amendment Type [Contract Ad	ljustment]							
	b) Reason								
	Amendments	Person	alize Find View All						
	General Statistics Billing Amended Amounts Re	evenue Amended Amounts Misc.							
	Amendment Amendment Type Re	ason	*Process Date						
	0000000013 Contract Adjustment V	lew Project Added	10/01/2019						
	0000000012 CONTR CONV CO	CONTR LN CONV 07/23/2019							
9.	Click Save.	-							
	0000000004 ARGIS Interface Chg	_							
	Billing Plans Revenue Plans								
	Return to Award Profile								
	Return to Search E Notify								
	General Lines Amendments								
	L								



Sten	Action
10.	Click Lines.
11.	Click Add Contract Lines.
12.	 Enter the following: a) Product [AS_INCURRED, FIXED_AMOUNT] b) Price Type [Amount for FIXED_AMOUNT or Rate for AS_INCURRED]
13.	Click Search.
14.	Select the appropriate result.
15.	Click Add Contract Line.
16.	Click the Return to Contract Lines link.
17.	Select the Lines tab.
18.	 Review the General section and verify the following values: a) Start Date (of the award) b) End Date (of the award plus add 180 days to the contract line) c) Status [Active] Note: Hold Billing on Unpaid Cost and Hold Revenue on Unpaid Cost should not be checked. Contact your manager if they are.
19.	Click Save.



Sten	Action										
20	On the	Detail tab u	nder the (ont	ract Li	nes he	ading se	lect the	Contra	rt Terme	s link
20.	under the Contract Terms heading.									, IIIK	
	General Lines Arrendments										
	Contract Number 0000005668 Sold To Customer University of Florida Amendment Number 000000012 Contract Status ACTIVE										
	Amend Contract										
	Contract Line	s ? tail <u>Billing Amount Details</u>	Revenue Amount Details				Personalize	Find View All 🔄	l 🔣 First 🕢	1-12 of 12 Last	
	Actions L	ine Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Nar	
	- Actions	1 COST_REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
		2 COST_REIMB	Direct Expenses	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	- Actions	3 COST_REIMB	INDIRECT_EXP	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	✓ Actions	4 COST_REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	✓ Actions	5 COST_REIMB	Direct Expenses	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	✓ Actions	6 COST_REIMB	INDIRECT_EXP	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	✓ Actions	7 COST_REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
		8 COST_REIMB	Direct Expenses	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	✓ Actions	9 COST_REIMB	INDIRECT_EXP	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	✓ Actions	10 COST_REIMB	SUBCONTRACT01	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	
	Actions	11 AS_INCURRED	As Incurred	Rate	In Progress	Ready	Contract Terms	Distribution	Internal Notes	University of Florida	
			, a monto	- Carlo	4	litter	Contract Ionio			•	
	Pomovo	the project f	rom the con	atrac	t line 110	ing the	minus ci	$\mathbf{an}()$ by	t noto th	Project	
21.	number	as it will nee	d to be ass	ociate	ed with	the nev	v Line.	gii (-), bu	t note th	enojeci	
22.	Click O	OK.									
23.	Click O	OK.									
24.	Click S	ave.									
	Click th	a right arr	\mathbf{w} (>) to	go to	the ne	w cont	tract Lin	0			
25.			UW (~) 10	goit				C.			
26.	Enter th	ne following	as require	ed:							
	a) b) c) d)	PC Busines Rate Set [G Project Activity [G	ss Unit GM_RAT RANT]	E, G	M_RA	TE_T	M]				
27.	Click S	ave.									



Sten	Action
28.	Click the Return to General Information link.
29.	Click Amend Contract.
30.	Click OK.
	Note: The allowable money that has not been billed on the project that will be moved needs to be removed from the current contract line and moved onto the new contract line. The new contract line will only have the remainder of the allowable billing limit and not include the preemptive budgetary amount.
31.	Click the Amount Allocation link.
32.	 In the following fields enter the total amount of the award authorized to be billed or the adjusted amount to bring the line to the total amount: a) Billing Amount/Limit (remove from line X) b) Billing Amount/Limit (add to line X)
33.	Click the second Recalculate button.
34.	Verify the Allocation is complete.
35.	Click Save.
36.	Click Return to General Information.
37.	Select the Lines tab.
38.	Click the Return to General Information link.
39.	Click Amend Contract.
40.	Click OK.
41.	Note: The following section is for Fixed only.
	Select the Lines tab.



Sten	Action
42.	Select the Detail tab.
43.	Select the Distribution link in the Accounting column.
44.	Enter the following:
	Revenue a) Distribution Code [REV-[Project Type]]* b) Account (defaults) c) Project (Enter associated project.) d) Fund e) Program Contract Asset a) Distribution Code [AR-UAR[CG/RF] (This value will become blank once the Department is deleted.) b) Department [delete defaulted value] c) Account [defaults] d) Project (Enter associated project.) e) Fund f) Program
45.	Click Save.
46.	Ensure both lines are valid. The contract Asset and Revenue lines will only be valid after the combo build has been run.
47.	Click the Amendments tab.
48.	Click the Details link of the Pending amendment.
49.	Update the Amendment Status to Ready.
50.	Click Save.
51.	Run the FXGM_PENDING_AMENDMENTS_NOTES query to identify all amendments that are ready to be reviewed.



Sten	Action
52.	Perform a QA Check on the setup of all awards in Review status.
53.	If any contract changes need to be made, make the appropriate changes.
54.	If any award changes need to be made, change the Amendment Status to Pending.
55.	Refer to the "System Navigation for Grants" manual, "Course 1. Establish Awards," section "V. Award Profile Notepad" to document all changes.
56.	Process the amendment.
57.	Click Save.



XI. NOTIFY DEPARTMENT

The department must be notified when the award is about to end and will not be extended. Do the following for final reports and invoices to be rendered:

Step	Action
1.	Navigate to Main Menu > Grants > Awards > Award Profile.
	Search Main Menu Top Menu Feature Search Menu: Image: Search Menu: Image: Search Menu: Image: Search Menu: Imag
	The menu is no Main Menu to g Supplier Contracts
	Highlights Departmental Authorization
	Recently Used Customer Sources appear under the source Contracts Customer Contracts menu, located Order Management items Image: Customer Contracts
	Breadcrumbs your navigation you access to t subficition Services Procurement
	Subtorders. Grants Grants Project Costing Awards Awards Award Profile
	Menu Search, the Main Menu type ahead whi finding pages n Proposal Management Billing Image: Project Activity Sponsored Projects Officient Project Activity Sponsored Projects Officient Project Activity
	Accounts Payable Departments Project Budget Inquiry Banking Banking Sponsors Subrecipients Megotiate Award
	Cash Management Commitment Control Commitment Control Process Facilities Admin
2.	Notify the department to get expenditures posted to the project or give them time to get a no-cost extension.



XII. MILESTONE COMPLETION

When Milestones have been used and updated but the award date has passed and the award will not be extended, do the following to update Milestones so that final reports can be rendered.

Step	Action
3.	Navigate to Main Menu > Grants > Awards > Award Profile.
	UCF Financials Navigator - Search Search myUCF
	Favorites - Main Menu -
	Search Menu:
	lop Menu Featu
	The menu is nov Manager Self-Service
	Main Menu to g Supplier Contracts
	Highlights Uberattmental Authonization
	appear under ti Customer Contracts
	Order Management Items
	□ Suppliers →
	Breadcrumbs
	you access to t subfolder
	Garants Sponsor Websites
	Project Costing Awards Award Profile
	the Main Menu 🕒 Billing 🗀 Institutions 📄 Project
	finding pages n Accounts Receivable Departments Project Sum Project Budgets
	Asset Management Professionals Project Budget Inquiry Commitment Control From
	Carch Management Subrecipients Carch Management Subrecipients Subrecipients
	Commitment Control Interactive Reports
4.	Enter values in the following fields:
	a) Business Unit
	b) Project (Project ID)
	Favorites • Main Menu • > Grants • > Awards • > Award Profile
	Award Profile
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value
	▼ Search Criteria
	Award ID begins with
	Project begins with V
	Proposal ID begins with V
	Reference Award Number begins with V
	Case Sensitive



Sten	Action
5.	Click Search.
	Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria
6.	Select the Milestones link.
	Award Eunding Resources Certifications Terms Milestones Key Words Funding Inquiry
7.	Verify that all Milestones have a status of Complete .
	Milestones Personalize Find View All [3] [2] First (1 of 1) Last General Detail [1779] Milestone Type Milestone Code Milestone Code Description Milestone Priority Due Date Milestone Status Milestone Status Description Milestone Status Description
8.	Ensure that all Milestones and Deliverables have been met in the Huron Research Suite (HRS) system.



XIII. COMPLETE FINAL REVIEW

After all transactions have been posted to the project, the award date has passed, and it has been determined that the award will not be extended, a final review should be completed so that the final invoice and reports can be rendered.

Step	Action
1.	Navigate to Project Costing > Interactive Reports > Transactions in Progress .
2.	Verify that all outstanding journals have been posted.
3.	To search, enter the following: a) Days Inactive Range [All] b) Business Unit c) Project d) Date Option e) My Projects [Unchecked]
4.	Click Search.
5.	Ensure all lines have been integrated and no outstanding direct cost expenses exist that need to be billed.
6.	Validate facilities and administrative (F&A) costs that all expenses have been charged.
7.	Ensure the project has no open Accounts Receivable items.
8.	Close out all outstanding encumbrances.



XIV. PREPARE FINAL REPORTS AND INVOICES

When all transactions have been posted to a project and the project analysis has been completed, follow these steps so that the award can be closed:

Step	Action
1.	To generate the final invoice, refer to the "System Navigation for Grants" manual, "Course 4. Process Billing."
2.	 To generate system-delivered reports, refer to the "System Navigation for Grants" manual, "Course 6. Workcenters and Reporting." Reports could include the following: a) Final Financial Report b) Final Narrative Report c) SF-425 Federal Financial Report



XV. MOVE RESIDUAL FUNDS

If after final billing has been completed, users find that the project received more money than was spent on expenditures, the university is allowed to keep the remaining money. Before the award is closed, the following tasks should be completed:

Step	Action
1.	Verify the award has no outstanding receivables.
2.	Verify that all charges have been posted.
3.	Create a journal to load overhead to the budget.
4.	Create a journal to move the residual balance to the department.
5.	Update the FA Rate of the Project to have a funded rate of zero as of the journal transaction date.
6.	For guidance refer to the "System Navigation for Grants" manual, "Course 1. Establish Awards," section "VI. Set Up Project & Activity."



XVI. CLOSE AWARD, PROJECT, & ACTIVITY

Once issues arising from the project analysis have been resolved, final reports and invoices must be sent. Follow these steps:

ten Action	1
1. Navig	ate to Main Menu > Grants > Award > Award Profile
1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	
<u> </u> 🐇 U	CF Financials Navigator - Search Advanced Search myUCF
Equoritos	
Pavonies	Search Monu:
Tee Mee	ward werd.
Top Men	\$
	Employee Self-Service
The men	u is nov 📮 Manager Self-Service 🔸
Main Me	nu to g 😑 Supplier Contracts 🔸
Highligh	ts Departmental Authorization
Recent	y Used Customers
appear menu, lo	under til 🤐 Customer Contracts
	Order Management
Breadc	rumbs - Procurement
you acc	ess to t Sanvices Procurement
subfolde	ers.
	Proposals
	Proposal Management Awards
the Mair	earch, n Menu 🖻 Billing Institutions
type ahe	aad whi 😑 Accounts Receivable 📮 Sponsored Projects Off 📃 Project Activity
2. Enter t	the following:
-)	Density and Harit
a)	Business Unit
b)	Project (Project ID)
Award	Profile
Enter an	y information you have and click Search. Leave fields blank for a list of all values.
Find a	n Existing Value Add a New Value
▼ Sea	rch chiena
	Award ID begins with T
Referen	ce Award Number begins with V
- Case	: SEUSITIAE



Sten	Action		
3.	Click Search.		
	Case Sensitive	earch 🖾 Save Search Criteria	
4.	Update Award Status	to Closed.	
	Award <u>F</u> unding Meso	urces <u>C</u> ertifications <u>T</u> e	erms Milestones Key Words Funding Inquiry
	Reference A	Award ID RF00001009	Federal Award Identificat
		ward Number [1007000	rederal Award Identificat
		Title University of E	xeter - Chang
	Lon	g Description RF: Flood important mega cities un	act assessment of urban growth and climate change in nder urban sprawl and climate change impacts
		131 characters	s remaining
		Award PI Chang, Ni-bin	Reporting Role
		Sponsor University of E	Exeter
	Post Award A	Administrator	Q
		Purpose APRE	Q
		Status Closed Award Type Grant	T T
5.	Click Save.		
	🔲 Save 🔝 Return to Sv	arch += Provious in L	ist Next in List Notify Of Refresh
	Cave Q Retuin to St		
	Award Funding Resources	Certifications Terms Mile	estones Key Words Funding Inquiry
6.	Under the Associated column.	Project heading, cli	ick the correct Project ID link in the Project
	Associated Project		
	PC Business Unit	Project	Description
	RFD01	16608014	SMA-RF- FLOOD IMPACT ASSESS
	RFD01	16609914	SMA-RF MATCH-FLOOD IMPACT ASSE



Sten	Action	
7.	Click the Project Status link. The link should disp Adjustment .	olay as Open or Reopened for
	General Information Project Costing Definition Primayera Manager Location Phases /	Approval Justification User Fields Rates Attachments D
	Project 012280AA Add to My Pro	ects e ⁰ Project Hierarchy
	*Description NTC-CAREER: FAST REFRESHING HO Program *Integration UCF01 Q University of Central Florida	ssing Status Active oject Status: Open
8.	On the Status page add another row.	
	Status 🔓	
	Project 16608014 Des	cription SMA-RF- FLOOD IMPACT ASSESS
	Project Status	Find View All First ④ 1 of 2 () Last
	Effective Date 07/18/2019 Set	quence 1
	 a) Effective Date b) Status [F – Financially Closed (stops all t c) Comments 	ransactions)]
	Project_Status	Find View All First (1 of 4) Last
	Effective Date 10/06/2019 3 Seq	
	Priority 0	ustment
	Interest Calculation Factor 0.00	
	Comments	
10.	Click Save.	
	Return to Project General	
	🔚 Save 🔯 Return to Search 🖃 Notify 🤗 Refresh	



Sten	Action
11.	Click Return to Project General.
	Return to Project General
	Save Return to Search Notify Refresh
12.	Click Return to Award Profile.
	Return to Award Profile
	Refresh
13.	Click the View Contract link.
	Favorites - Main Mi Award Eunding Referenc View Contract
	P Associated Project
14.	Click the Billing Plans link at the bottom of the page.
	Billing Plans Revenue Plans
	Return to Award Profile
	Save Return to Search
	General Lines Amendments



Sten	Action
15.	Ensure Billing Status on all lines is Completed.
	Personalize Vassigned First (1 1 2 0 1) Line Product Line Description Billing Amount Price Type Fee Type Plan Plan Description Billing Method Status 2 COST_REIMB Direct Expenses Rate None B101 8244/COST_REIMB Bill Plan As Incurred Completed 3 COST_REIMB INDIRECT_EXP Rate None B101 8244/COST_REIMB Bill Plan As Incurred Completed
16.	Click the Return to General Information link.
	Return to General Information
17.	Click the Revenue Plans link at the bottom of the page.
	Billing Plans Revenue Plans
	Return to Award Profile
	Save 🔯 Return to Search 🖆 Notify
	General Lines Amendments
18.	Ensure plan Status is Completed.
	Contract Lines to be Assigned / Unassigned Personalize Find View All @ W First (1.3 of 3 () Last Line Product Description Revenue Amount Price Type Fee Type Plan Plan Description Revenue Method Status
	2 COST_REIMB Direct Expenses Rate None R101 Revenue Plan As Incurred Completed 3 COST_REIMB INDIRECT_EXP Rate None R101 Revenue Plan As Incurred Completed
19.	Click the Return to General Information link.
	Return to General Information
	Return to Search Sea
20.	Click the magnifying glass icon by the Contract Status field. The Look UP Contract Status field displays.
	General Lines Amgndments
	Amendment Number 000000008 *Contract Status CLOSED



Sten	Action
21.	Update Contract Status to Financially Closed.
	Look Up Contract Status
	SetID UCF01 Contract Status begins with ▼ Look Up Clear Cancel Basic Lookup Search Results View 100 First ④ 1-3 of 3 ⓑ Last Contract Status Description View 100 First ④ 1-3 of 3 ⓑ Last Contract Status Description Processing Status ACTIVE Active Active CLOSED Closed Active FIN_CLOSED Financially Closed Active Financially Closed Active Financially Closed Active Financially Closed Active
22.	Click Save.
	Return to Award Profile
	General Lines Amendments



XVII. CLOSEOUT IN HRS

When an award end date has passed and the award will not be extended, the award should be closed out in the Huron Research Suite (HRS). To do this, perform the closeout procedure described in the HRS documentation.