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COURSE 3. MAINTAIN AWARDS

I. CHANGE IN SPONSOR

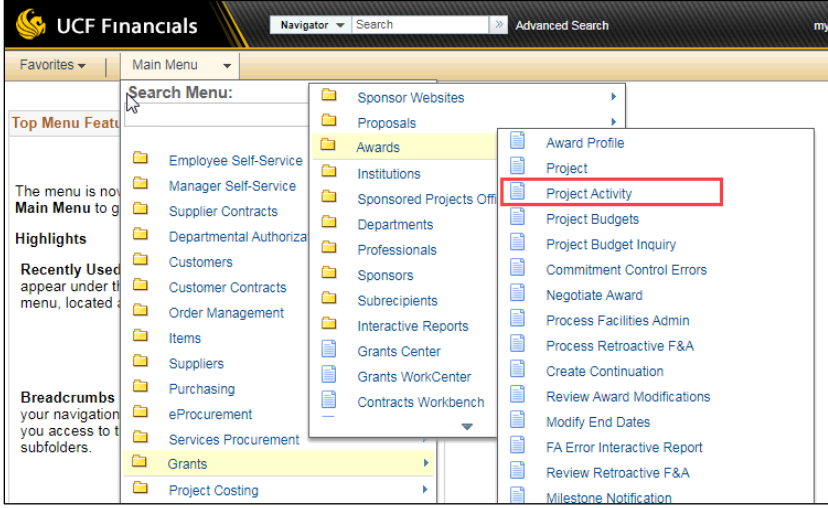
If an award was generated, but the contract was set up with the wrong sponsor, the contract needs to be closed and a new proposal set up.

Step	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.)

Step	Action
1.	<p>Navigate to Main Menu > Grants > Awards > Project Activity.</p>  <p>The screenshot shows the UCF Financials interface. The 'Main Menu' is expanded to show a list of categories. 'Grants' is selected, and its sub-menu is displayed. 'Awards' is selected, and its sub-menu is shown. 'Project Activity' is highlighted with a red box. Other options in the 'Project Activity' sub-menu include Award Profile, Project, Project Budgets, Project Budget Inquiry, Commitment Control Errors, Negotiate Award, Process Facilities Admin, Process Retroactive F&A, Create Continuation, Review Award Modifications, Modify End Dates, FA Error Interactive Report, Review Retroactive F&A, and Milestone Notification.</p>
2.	<p>Enter values into the following fields:</p> <ul style="list-style-type: none">a) Business Unitb) Project



UCF Financials

System Navigation for Grants

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

Activity begins with

WBS ID begins with

Project Description begins with

Activity Description begins with

Activity Type begins with

Processing Status =

Activity Owner begins with

New Milestone =

Include History Correct History Case Sensitive

3. Click Search.

Include History Correct History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

4. To update F&A information, select the FA Rates tab.

Favorites | Main Menu > Grants > Awards > Project Activity

[General Information](#) [Definition](#) [FA Rates](#) [Location](#) [Attachments](#) [Quality](#) [User Fields](#) [Rates](#) [Budget Alerts](#) [Asset Integration Rules](#)

5. Add new rows as needed. Enter the following:

F&A Rate Info

Facilities Admin Rate (select appropriate rate)

Institution

FA Base*

F&A Rate Info Find | View All First 1 of 1 Last

Facilities Admin Rate Org Res On

Institution

FA Base

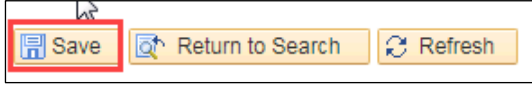
Institution Rate Find | View All First 1 of 1 Last

Eff Date FA Rate %



*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**.



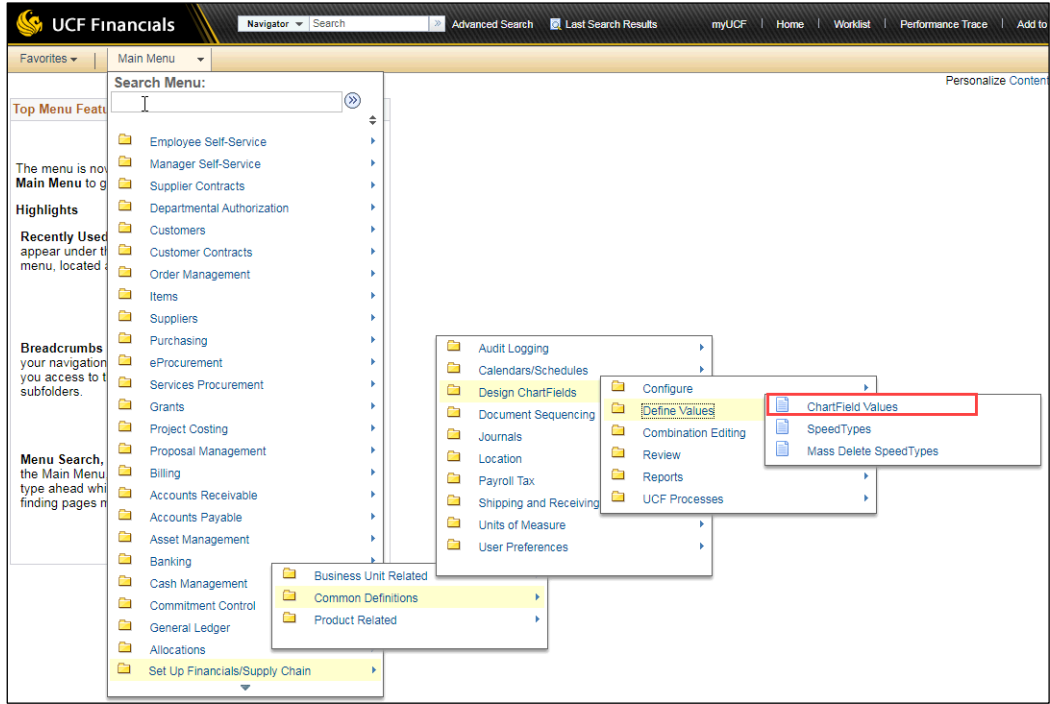
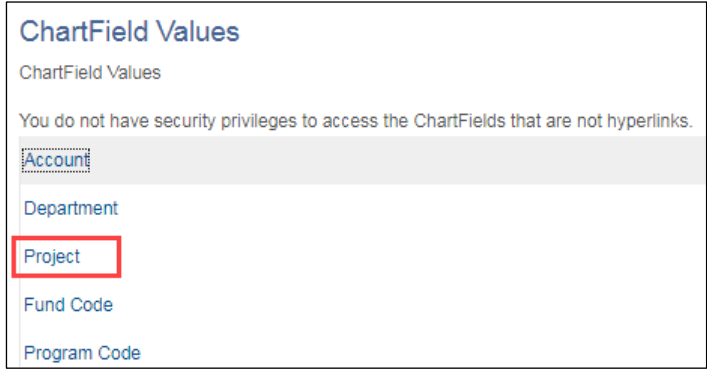
7. Set up the **Contract Line** according the appropriate system procedure. For guidance refer to the following sections of “Course 2. Set Up Contracts” in the “System Navigation for Grants” manual:

- “I. Set Up & Activate a CRB Contract”
- “II. Set Up & Activate an LOC Contract”
- “III. Set Up & Activate a Fixed Price Contract”
- “X. Set Up & Activate a NOBILL 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.	<p>Navigate to Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values.</p>  <p>The screenshot shows the UCF Financials Main Menu. The navigation path is highlighted: Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values. The 'ChartField Values' link is highlighted with a red box.</p>
2.	<p>Click the Project link.</p>  <p>The screenshot shows the 'ChartField Values' page. The 'Project' link is highlighted with a red box. The page title is 'ChartField Values' and the subtitle is 'ChartField Values'. A message states: 'You do not have security privileges to access the ChartFields that are not hyperlinks.' Below this, there is a list of links: Account, Department, Project, Fund Code, and Program Code.</p>



3. On the **Project ID** page enter values into the following fields:

- a) **SetID**
- b) **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](#)

▼ **Search Criteria**

SetID =

Project begins with

Description begins with

Correct History Case Sensitive

4. Click **Search**.

Correct History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

5. Click the **Attributes** link. The **ChartField Attributes** dialog box displays.

Project

SetID UCF01

Project 18558A01

*Description *Status

*Start Date Integration

*End Date 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**
- f) **SP_OPT**
- g) **SP_STD**
- h) **VPOrg**



UCF Financials

System Navigation for Grants

ChartField Attributes

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute Value Description		
UCF01	18558A01	01/01/1900	PROJECT_ID	BE	48900700	Contracts and Grants	+	-
UCF01	18558A01	01/01/1900	PROJECT_ID	EF	2	Restricted Current Funds	+	-
UCF01	18558A01	01/01/1900	PROJECT_ID	EP			+	-
UCF01	18558A01	01/01/1900	PROJECT_ID	FID	655005	Sponsored Research Development Trust Fund UCF	+	-
UCF01	18558A01	01/01/1900	PROJECT_ID	SF	2	Trust Fund	+	-
UCF01	18558A01	01/01/1900	PROJECT_ID	SP_OPT	000000	Education and General Activities	+	-

OK Cancel

7. Click **OK**.

OK Cancel

8. Click **Save**.

Project

Project

SetID UCF01

Project 18558A01

*Description Obesity Study

*Start Date 06/08/2019

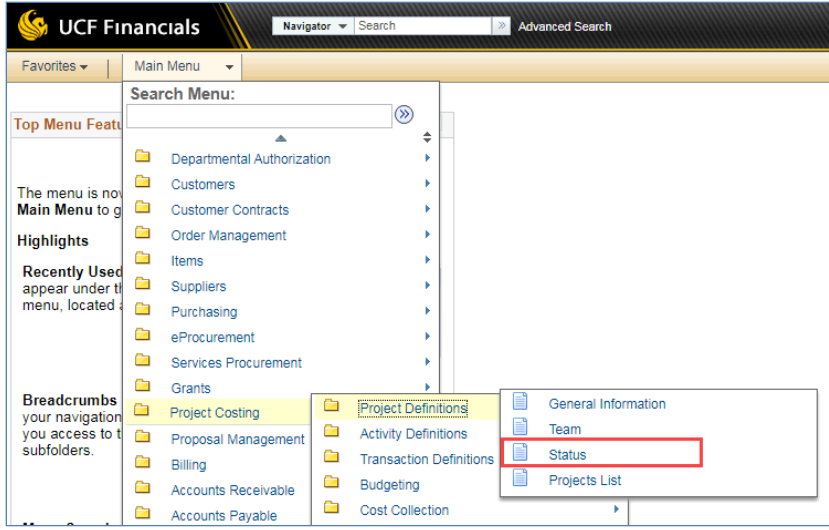
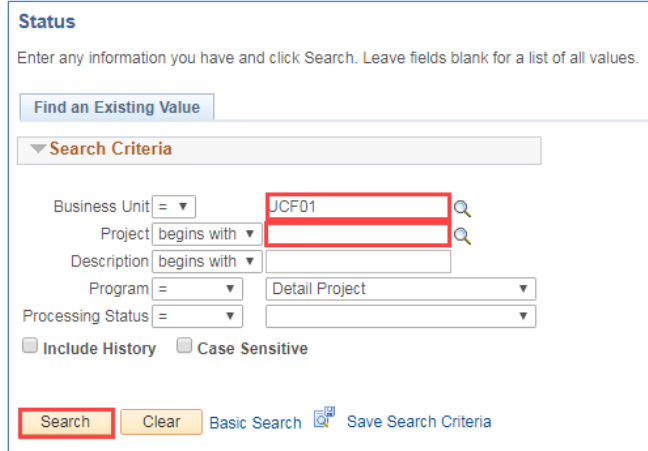
*End Date 08/28/2025

Save Return to Search Notify



IV. PROJECT STATUS

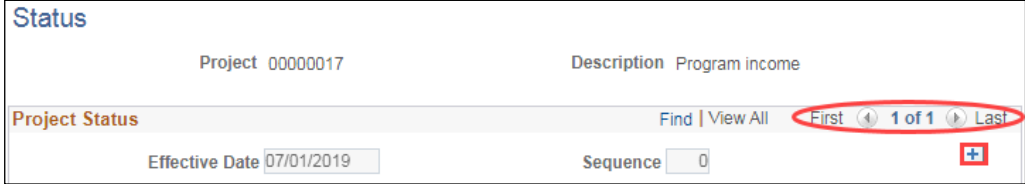
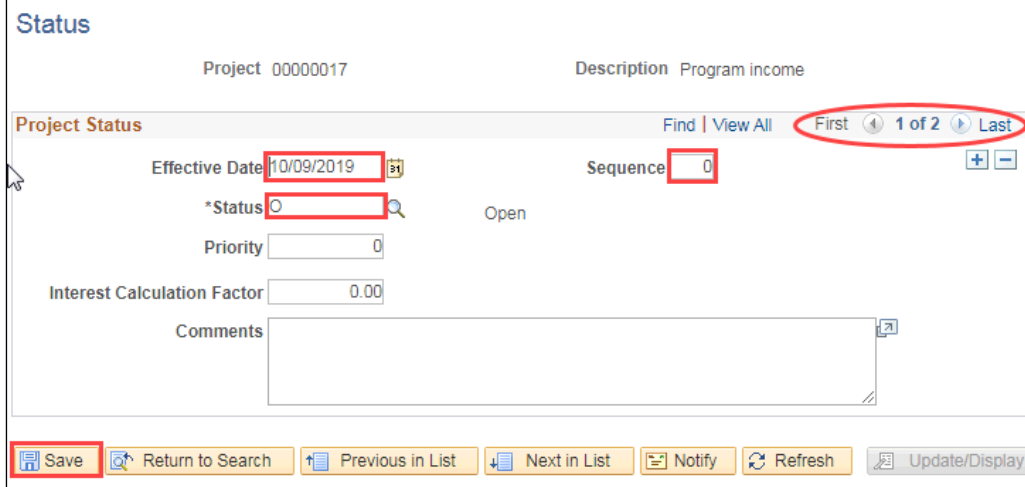
The Project Status defaults to Open when an award is generated to allow transactions to be posted. If transactions need to be stopped on a project, the status can be updated to reject certain analysis types. When the Project Status needs to be changed to ensure that transactions are confined to the allowability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

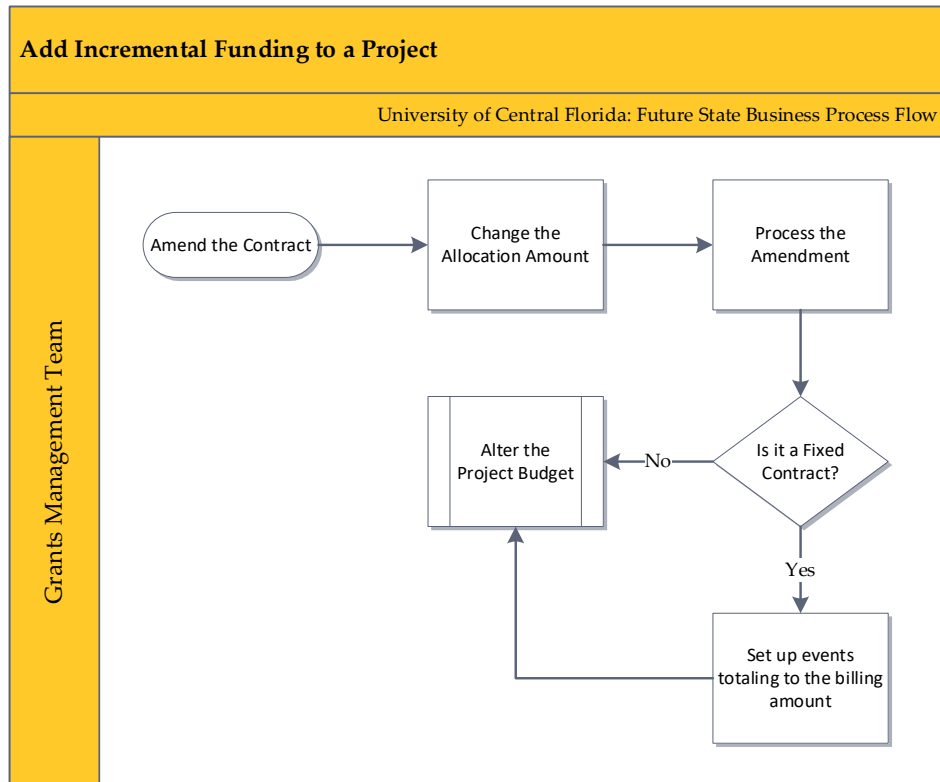
Step	Action
1.	<p>Navigate to Main Menu > Project Costing > Project Definitions > Status.</p>  <p>The screenshot shows the UCF Financials interface. The 'Main Menu' is expanded to show 'Project Costing', which is further expanded to 'Project Definitions'. The 'Status' option is highlighted with a red box. Other options visible include General Information, Team, and Projects List.</p>
2.	<p>Enter values in the following fields:</p> <ul style="list-style-type: none">a) Business Unitb) Project (Project ID)  <p>The screenshot shows the 'Status' search form. The 'Business Unit' dropdown is set to 'JCF01'. The 'Project' dropdown is highlighted with a red box. Other fields include 'Description', 'Program', and 'Processing Status'. There are also checkboxes for 'Include History' and 'Case Sensitive', and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.</p>



UCF Financials

System Navigation for Grants

3.	Click Search. (See image in previous step.)
4.	Click the plus sign (+) to add an additional row. 
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 
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

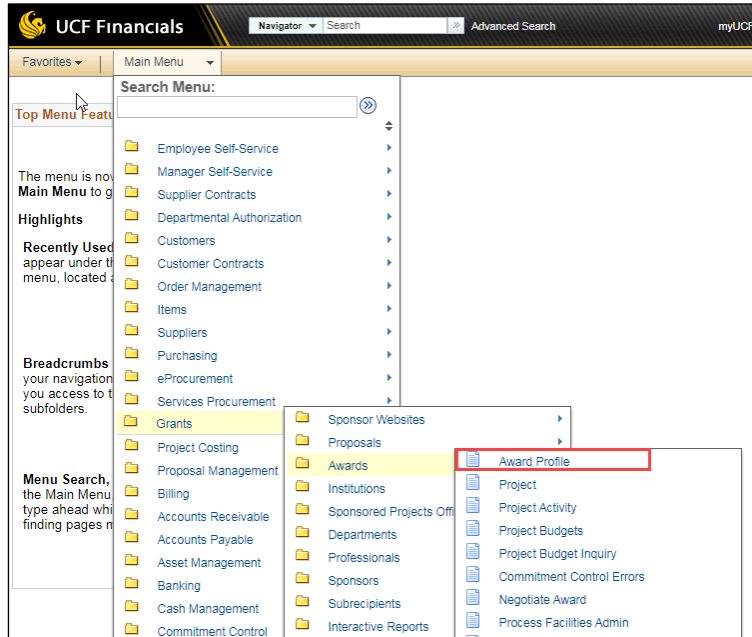
When additional funds need to be added to a project with an active contract in which the Contract Line and Project have been set up, complete the following steps to ensure that transactions can be posted to the project:

Step	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.



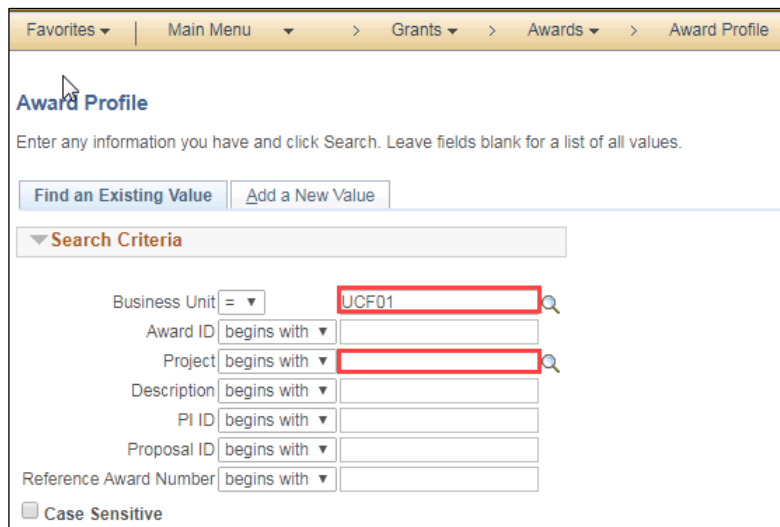
UCF Financials

System Navigation for Grants



(Alternately, navigate to **Main Menu > Customer Contracts > Create and Amend > Amendment Details.**)

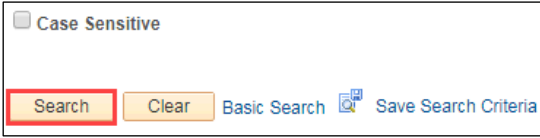
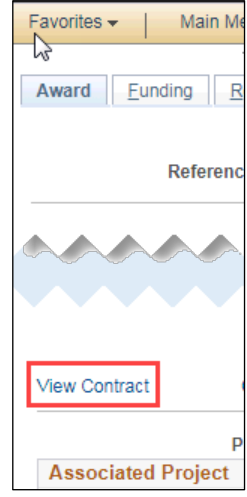


3. Enter values into the following fields:
- a) **Business Unit**
 - b) **Project (Project ID)**





UCF Financials

System Navigation for Grants

<p>4.</p>	<p>Click Search.</p>  <p>A screenshot of a search interface. At the top left, there is a checkbox labeled "Case Sensitive". Below it, there are four buttons: "Search" (highlighted with a red box), "Clear", "Basic Search" (with a magnifying glass icon), and "Save Search Criteria" (with a document icon).</p>
<p>5.</p>	<p>Click the View Contract link.</p>  <p>A screenshot of a contract details page. At the top, there are tabs for "Award", "Funding", and "References". Below the tabs, there is a section titled "References" with a wavy blue graphic. At the bottom of the page, there is a button labeled "View Contract" (highlighted with a red box) and a section titled "Associated Project".</p>
<p>6.</p>	<p>Select the Amendments tab.</p>  <p>A screenshot of a tabbed interface. There are three tabs: "General", "Lines", and "Amendments" (highlighted with a red box). Below the tabs, there are labels for "Contract Number" and "Amendment Number".</p>
<p>7.</p>	<p>Click the Amend Contract button.</p>  <p>A screenshot of the "Amendments" tab. It shows the "General", "Lines", and "Amendments" tabs. Below the tabs, there are labels for "Contract Number" and "Amendment Number", both with "00000" as a placeholder. At the bottom, there is a button labeled "Amend Contract" (highlighted with a red box).</p>



UCF Financials

System Navigation for Grants

8. Enter values into the following fields:

- a) **Amendment Type**
- b) **Reason**

Amendment	Amendment Type	Reason	*Process Date	Amendment Status	Detail	Notes
0000000013			10/01/2019	Pending	Detail	Notes
0000000012	CONTR CONV	CONTR LN CONV	07/23/2019	Complete	Detail	Notes
0000000011	Contract Adjustment	New Project Added	06/20/2019	Complete	Detail	Notes

9. Click **Save**.

0000000004 ARGIS Interface Chg

[Billing Plans](#) [Revenue Plans](#)

[Return to Award Profile](#)

Save [Return to Search](#) [Notify](#)

[General](#) | [Lines](#) | [Amendments](#)

10. Click the **Detail** link of the **Amendment** that is **Pending**.

Amendment	Amendment Type	Reason	*Process Date	Amendment Status	Detail	Notes
0000000013	CONTR CONV	CONTR LN CONV	10/01/2019	Pending	Detail	Notes
0000000012	CONTR CONV	CONTR LN CONV	07/23/2019	Complete	Detail	Notes

11. On the **Amendment Details** page, click the **Amendment Amount Allocation** link.

Amendment Amount Allocation

[Return to General Information](#)

Save [Return to Search](#) [Notify](#)

12. Enter the total authorized adjustment in the following fields:

- a) **Total Billing Adjustment**
- b) **Fixed Billing Adjustment** (only if fixed contract* for the NEW billing line)
- c) **New Billing Limit** (on the NEW billing line)
- d) **New Billing Amount** (only if fixed contract* for the NEW billing line)



UCF Financials

System Navigation for Grants

Amendment Billing Allocation | Amendment Revenue Allocation

Contract 000005668
Business Unit UCF01
Sold To CNG50026 University of Florida
Currency USD

Amendment 000000013
Amendment Type CONTR CONV
Amendment Reason CONTR LN CONV

Contract Billing

Total Billing Adjustment	0.00	Unallocated Billing	0.00
Total Billing After Adjustment	1,451,248.00		

Fixed Billing

Fixed Billing Adjustment	0.00	Unallocated Fixed Billing	0.00
Discount / Surcharge	0.00	Inclusive Prepays Adjustment	0.00
Net Adjustment	0.00	Allocation	Incomplete

Contract Line Pricing

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 Revenue Retroactively
<input type="checkbox"/>	1	COST_REIMB	363,170.02	363,170.02						
<input type="checkbox"/>	2	COST_REIMB	134,402.31	134,402.31						
<input type="checkbox"/>	3	COST_REIMB	151,041.55	151,041.55						
<input type="checkbox"/>	15	FIXED_AMOUNT					0.00			
<input type="checkbox"/>	16	AS_INCURRED		0.00						

Select All Clear All

Adjustment Line Totals

Recalculate

*If it is a fixed price contract, additional events need to be added to account for the monetary adjustment. Refer to the “System Navigation for Grants” manual, “Course 2. Set Up Contracts,” section “III. Set Up & Activate a Fixed Price Contract.”

13. Click the second **Recalculate** button. (See image in step 12.)



14. Under the **Adjustment Line Totals** heading, verify that the **Total Billing** and **Billing Limit** (for **AS_INCURRED** and **FIXED_AMOUNT**) are equal.

The screenshot shows a table titled "Adjustment Line Totals" with a "Recalculate" button in the top right. The table has two columns for values and two columns for labels. The labels are "Billing Amount", "Discounts/Surcharges", "Recurring Billing", "Billing Limit", and "Total Billing". The values are "0.00", "0.00", "0.00", "0.00", and "0.00" respectively. The "Billing Limit" and "Total Billing" cells are highlighted with red boxes.

<input checked="" type="checkbox"/> Select All	<input type="checkbox"/> Clear All	<input type="button" value="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**.

The screenshot shows a "Prepaids" section with a "Return to Amendment Details" link. Below the link are several buttons: "Save", "Return to Search", "Notify", "Previous tab", and "Next tab". The "Save" button is highlighted with a red box.

16. Click the **Return to Amendment Details** link.

The screenshot shows the same "Prepaids" section as in step 15. The "Return to Amendment Details" link is highlighted with a red box.

17. Under the **Amendment Details** heading, verify the **Total Billing Adjustment**.

The screenshot shows the "Amendment Details" form. It includes fields for "Contract" (0000005668) and "Sold To Customer" (CNG50026). There are two dropdown menus: "Amendment Type" (CONTR CONV) and "Amendment Reason" (CONTR LN CONV). At the bottom, there are two input fields: "Total Billing Adjustment" (0.00) and "Fixed Billing Adjustment" (0.00). The "Total Billing Adjustment" field is highlighted with a red box.

18. Update the **Amendment Status** to **Ready**.

The screenshot shows the "Amendment Status" dropdown menu. The "Process Date" is 10/01/2019. The dropdown menu is open, showing options: "Pending", "Cancelled", "Pending", and "Ready". The "Ready" option is highlighted in blue. Below the dropdown, there are fields for "Total Revenue Adjustment" (Ready), "Fixed Revenue Adjustment" (0.00), and "Fixed Revenue Allocation" (Complete).



UCF Financials

System Navigation for Grants

19. Click Save.

20. Click Process Amendment.

Amendment Details

Contract 0000005189 Amendment Number 0000000018
 Sold To Customer CNG50009

Amendment Type Contract Adjustment Process Date 10/14/2019
 Amendment Reason New Project Added *Amendment Status Ready **Process Amendment**

Total Billing Adjustment 0.00 Total Revenue Adjustment 0.00
 Fixed Billing Adjustment 0.00 Fixed Revenue Adjustment 0.00
 Fixed Billing Allocation Incomplete Fixed Revenue Allocation Incomplete

▶ Additional Amendment Details

Reference ID User Ref #1
 User Ref #2

Amendment Components Personalize | Find | 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		N

Return to General Information Internal Notes

Save Return to Search Notify

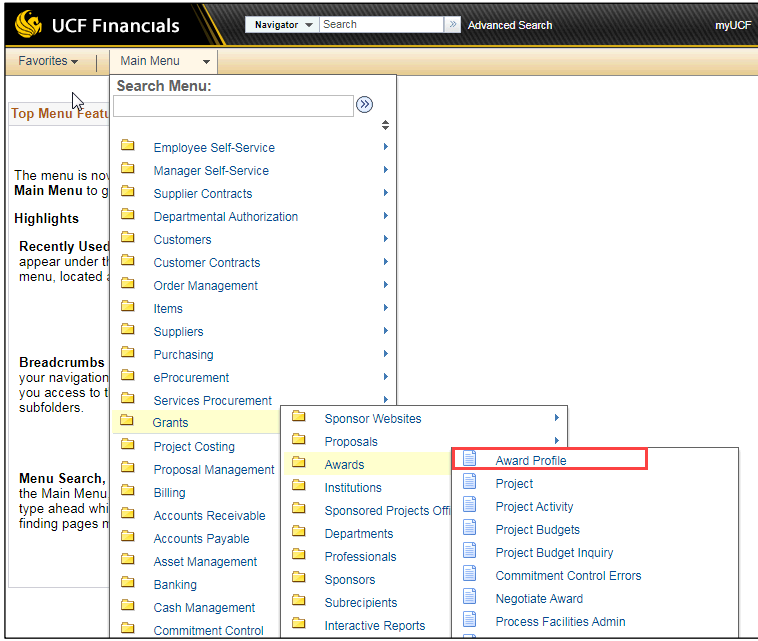
*Note: If it is a fixed amount contract, go to the **Events** page and create additional billing events for the total adjustment. Refer to the “System Navigation for Grants” manual, “Course 2. Establish Awards,” section “III. Set Up & Activate a Fixed Price Contract” for details on creating billing events.*

21. Click Save. (See image in previous step.)



VI. REDUCE BILLING LIMIT BELOW EXPENDITURES FIXED

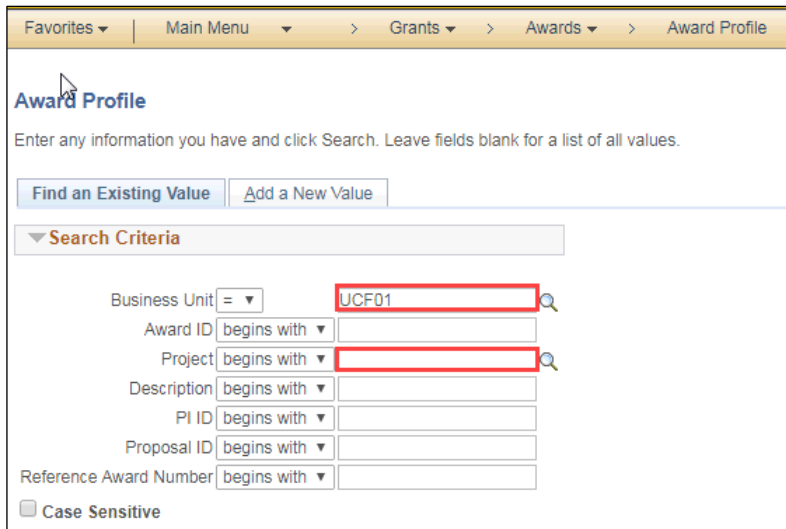
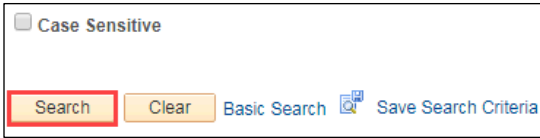
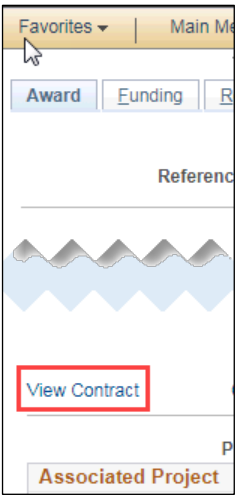
Transactions need to be taken off the project, and in cases where the contract has billed more than allowable, a credit event needs to be issued and AR maintenance to allow for the award billing limit to be reduced. Follow these steps:

Step	Action
1.	Remove project expenditures down to the amount of allowable spending.
2.	<p>Navigate to Main Menu > Grants > Awards > Award Profile.</p>  <p>(Alternately, navigate to Main Menu > Customer Contracts > Create and Amend > Assign Billing Plan > Define Billing Plan > Events tab.)</p>
3.	<p>Enter values into the following fields:</p> <ul style="list-style-type: none"> a) Business Unit b) Project (Project ID)



UCF Financials

System Navigation for Grants

	
<p>4.</p>	<p>Click Search.</p> 
<p>5.</p>	<p>Click the View Contract link. The General Information page opens.</p> 



UCF Financials

System Navigation for Grants

6. Click the **Billing Plans** link.

Other Information

Summary of Amounts ?

Billing Plans Revenue Plans

Return to Award Profile

Save Return to Search Notify

General | Lines | Amendments

7. On the **Assign Billing Plan** page, select the link in the **Plan** column of the **Line** that needs adjustments.

Favorites Main Menu Grants Awards Award Profile General Information Assign Billing Plan

Assign Billing Plan

Contract RFCONV0326 COM INTRNL MED-RF:Dynamic Cont

Sold To Customer Arnold P. Gold Foundation, The

Contract Lines to be Assigned / Unassigned

Line	Product	Line Description	Billing Amount	Price Type	Plan	Plan Description
<input type="checkbox"/> 1	COST_REIMB	Direct Expenses		Rate	B101	8495/COST_REIMB Bill Plan
<input type="checkbox"/> 2	COST_REIMB	INDIRECT_EXP		Rate	B101	8495/COST_REIMB Bill Plan
<input type="checkbox"/> 3	COST_REIMB	CONVERSION		Rate	B102	8495/COST_REIMB Bill Plan
<input type="checkbox"/> 4	MATCH	Direct Expenses		Rate	B103	8397/MATCH Bill Plan
<input type="checkbox"/> 5	AS_INCURRED	As Incurred		Rate	B104	As Incurred

8. Select the **Events** tab.

Billing Plan General **Events** History

9. Click **Add New Event**.

Billing Plan General Events History

Contract RFCONV0326

Sold To Customer CNG50549

Billing Plan B104

Add New Event



10. Enter values in the following fields:

- 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.)

11. Create another billing event for the same amount as the credit event on step 10, but do not set it to **Ready**.

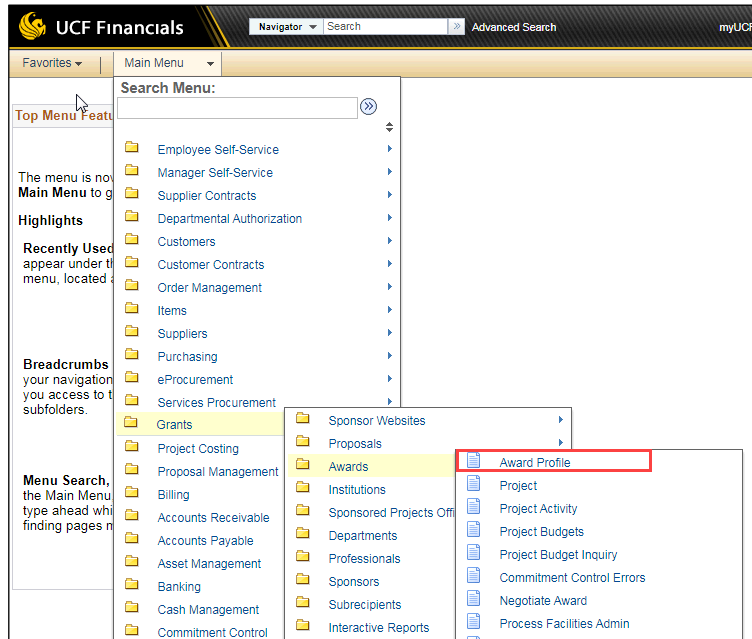
12. Click **Save**.

*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.”

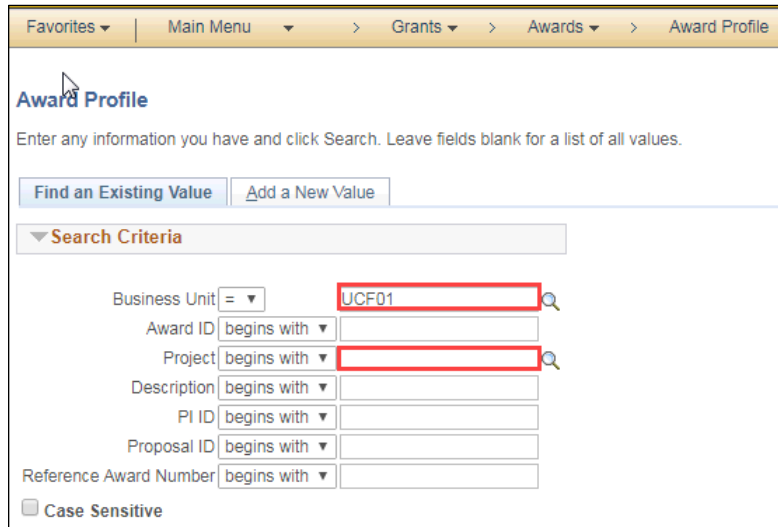


14. Navigate to Main Menu > Grants > Awards > Award Profile.



15. Enter values into the following fields:

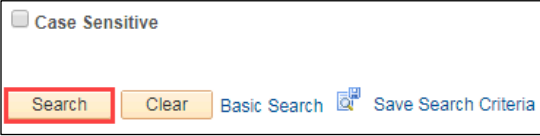
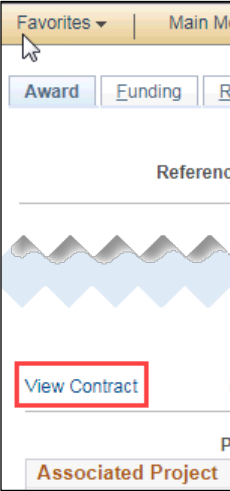
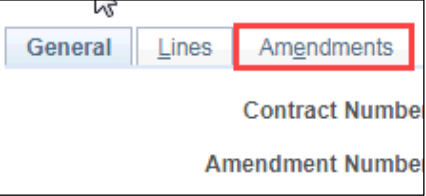

- a) **Business Unit**
- b) **Project (Project ID)**





UCF Financials

System Navigation for Grants

<p>16. Click Search.</p>	 <p>A screenshot of a search interface. At the top left, there is a checkbox labeled "Case Sensitive". Below it, there are four buttons: "Search" (highlighted with a red box), "Clear", "Basic Search" (with a magnifying glass icon), and "Save Search Criteria" (with a save icon).</p>
<p>17. Click the View Contract link. The General Information page opens.</p>	 <p>A screenshot of a web page showing a navigation menu. The menu includes "Award", "Funding", and "References". Below the menu, there is a "View Contract" link highlighted with a red box. At the bottom, there is a section labeled "Associated Project".</p>
<p>18. Select the Amendment tab.</p>	 <p>A screenshot of a tabbed interface. The tabs are "General", "Lines", and "Amendments". The "Amendments" tab is highlighted with a red box. Below the tabs, there are labels for "Contract Number" and "Amendment Number".</p>
<p>19. Click the Amend Contract button.</p>	 <p>A screenshot of the "Amendments" tab. It shows "Contract Number 00000" and "Amendment Number 00000". At the bottom, there is an "Amend Contract" button highlighted with a red box.</p>



UCF Financials

System Navigation for Grants

20. Enter values in the following fields:

- a) **Amendment Type**
- b) **Reason**

Amendments			
Amendment	Amendment Type	Reason	*Process Date
000000013	Contract Adjustment	New Project Added	10/01/2019
000000012	CONTR CONV	CONTR LN CONV	07/23/2019

21. Click **Save**.

000000004 ARGIS Interface Chg

Billing Plans Revenue Plans

[Return to Award Profile](#)

Save Return to Search Notify

[General](#) | [Lines](#) | [Amendments](#)

22. Click **Detail** link of the **Pending Amendment**.

Amendment	Amendment Type	Reason	*Process Date	Amendment Status	Detail	Notes
000000013	Contract Adjustment	New Project Added	10/01/2019	Pending	Detail	Notes
000000012	CONTR CONV	CONTR LN CONV	07/23/2019	Complete	Detail	Notes
000000011	Contract Adjustment	New Project Added	06/20/2019	Complete	Detail	Notes

23. Click **Amendment Amount Allocation**.

Amendment Amount Allocation

[Return to General Information](#)

Save Return to Search Notify

24. Reduce the limit to be equal to the sum of the total expenditures:

- a) **Total Billing Adjustment**
- b) **Fixed Billing Adjustment** (only if fixed contract* for the NEW billing line)



- c) **New Billing Limit** (on the NEW billing line)
- d) **New Billing Amount** (only if fixed contract* for the NEW billing line)

Amendment Billing Allocation | Amendment Revenue Allocation

Contract 000005668
Business Unit UCF01
Sold To CNG50026 University of Florida
Currency USD

Amendment 000000013
Amendment Type CONTR CONV
Amendment Reason CONTR LN CONV

Contract Billing

Total Billing Adjustment 0.00
Unallocated Billing 0.00
Total Billing After Adjustment 1,451,248.00

Fixed Billing

Fixed Billing Adjustment 0.00
Unallocated Fixed Billing 0.00
Discount / Surcharge 0.00
Inclusive Prepays Adjustment 0.00
Net Adjustment 0.00
Allocation Incomplete

Contract Line Pricing

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 Revenue Retroactively
<input type="checkbox"/>	1	COST_REIMS	363,170.02	363,170.02					<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2	COST_REIMS	134,402.31	134,402.31					<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	COST_REIMS	181,041.88	181,041.88					<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	15	FIXED_AMOUNT					0.00		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	16	AS_INCURRED		0.00					<input type="checkbox"/>	<input type="checkbox"/>

Select All Clear All Recalculate

Adjustment Line Totals

*If it is a fixed price contract, additional events need to be added to account for the monetary adjustment. Refer to the “System Navigation for Grants” manual, “Course 2. Set Up Contracts,” section “III. Set Up & Activate a Fixed Price Contract.”

25. Click the second **Recalculate** button. (See the image in step 24.)

26. Verify that the **Total Billing** and **Billing Limit** are equal.

Select All Clear All Recalculate

Adjustment Line Totals

Billing Amount 0.00
Discounts/Surcharges 0.00
Recurring Billing 0.00
Billing Limit 0.00
Total Billing 0.00

27. Click **Save**.

Prepays

Return to Amendment Details

Save Return to Search Notify Previous tab Next tab



UCF Financials

System Navigation for Grants

28. Click the **Return to Amendment Details** link. (See image in previous step.)

29. Update the **Amendment Status** to **Ready**.

Amendment Details

Contract 0000005668 Amendment Number 0000000013

Sold To Customer CNG50026

Amendment Type Contract Adjustment *Process Date 10/01/2019

Amendment Reason New Project Added *Amendment Status Pending

Total Billing Adjustment 3,504.00 Total Revenue Adjustment Ready

Fixed Billing Adjustment 0.00 Fixed Revenue Adjustment 0.00

Fixed Billing Allocation Incomplete Fixed Revenue Allocation Incomplete

30. Click **Save**.

Amendment Amount Allocation

[Return to General Information](#)

Save Return to Search Notify

31. Click **Process Amendment**.

Amendment Details

Contract 0000005189 Amendment Number 0000000018

Sold To Customer CNG50009

Amendment Type Contract Adjustment Process Date 10/14/2019

Amendment Reason New Project Added *Amendment Status Ready Process Amendment

Total Billing Adjustment 0.00 Total Revenue Adjustment 0.00

Fixed Billing Adjustment 0.00 Fixed Revenue Adjustment 0.00

Fixed Billing Allocation Incomplete Fixed Revenue Allocation Incomplete

Additional Amendment Details

Reference ID User Ref #1

User Ref #2

Amendment Components Personalize | Find | 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		N

Internal Notes

[Return to General Information](#)

Save Return to Search Notify

*Note: If it is a fixed amount contract, go to the **Events** page and create additional billing events for the total adjustment. Refer to the “System Navigation for Grants” manual, “Course 2. Establish Awards,” section “III. Set Up & Activate a Fixed Price Contract” for details on creating billing events.*

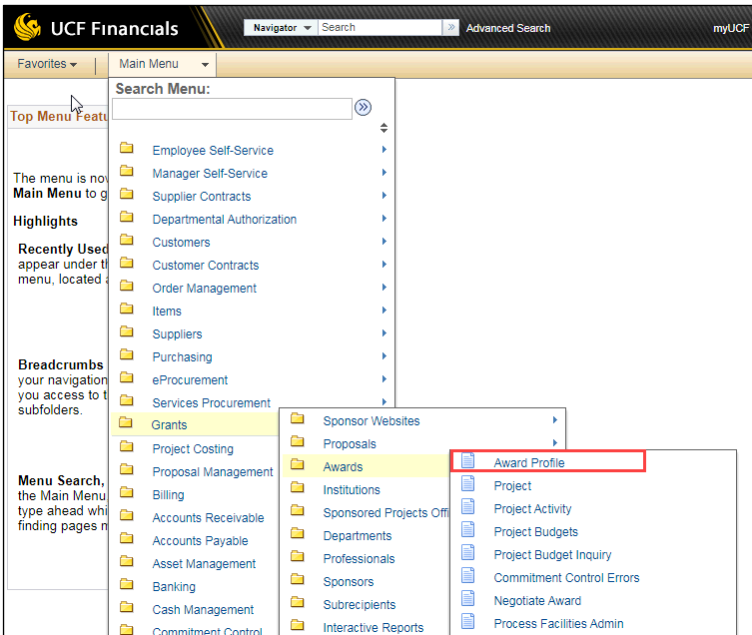


32.	Click Save . (See image in previous step.)
33.	To adjust the budget to equal the allowable amount, refer to the “System Navigation for Grants” manual, “Course 1. Establish Awards,” section “VI. Establish & Post Grants Award Budget.”
34.	<i>Note: Budget lines should never be deleted after they have been finalized. Create new lines and negative amounts to reduce budget lines when necessary.</i>



VII. REDUCE BILLING LIMIT BELOW EXPENDITURES AS INCURRED

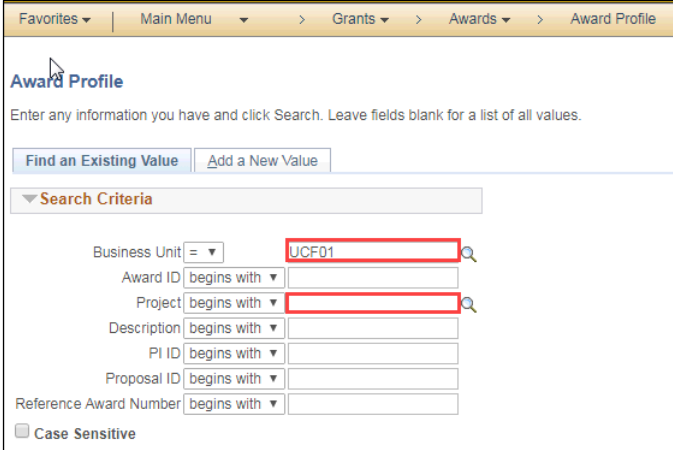
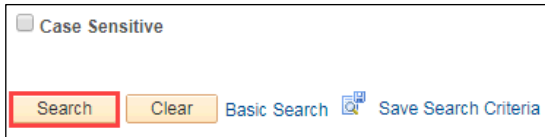
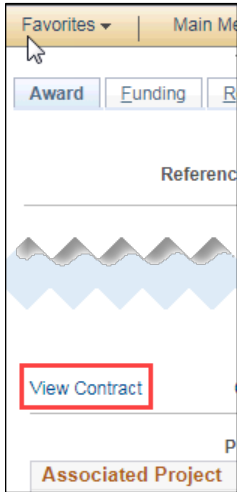
Transactions can be taken off a project or a credit invoice generated. When an award billing limit has been reduced, follow the steps below to reflect the change in UCF Financials. This will allow the project to be closed out in the future.

Step	Action
1.	<p>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:</p> <p><i>“Course 1. Establish Awards”</i></p> <ul style="list-style-type: none"> • “VI. Establish & Post Grants Award Budget” <p><i>“Course 4. Process Billing,” “Unit 3. Billing Activity”</i></p> <ul style="list-style-type: none"> • “I. Generate Cost-Reimbursable Bills” • “V. Generate Single Action Invoices”
2.	<p>Navigate to Main Menu > Grants > Awards > Award Profile.</p>  <p>(Alternately, navigate to Main Menu > Customer Contracts > Create and Amend > Amendment Details.)</p>



UCF Financials



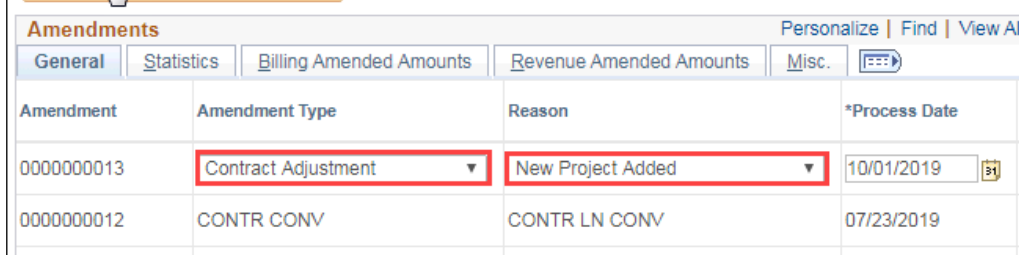
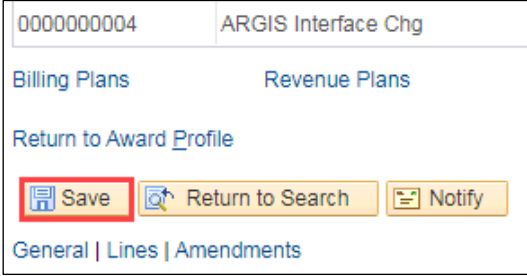
System Navigation for Grants

Step	Action
3.	<p>Enter values in the following fields:</p> <ul style="list-style-type: none">a) Business Unitb) Project (Project ID) 
4.	<p>Click Search.</p> 
5.	<p>Click the View Contract link.</p> 



UCF Financials

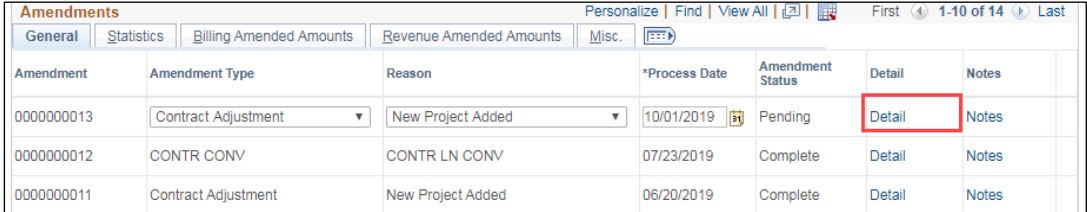
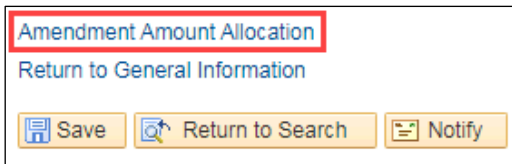
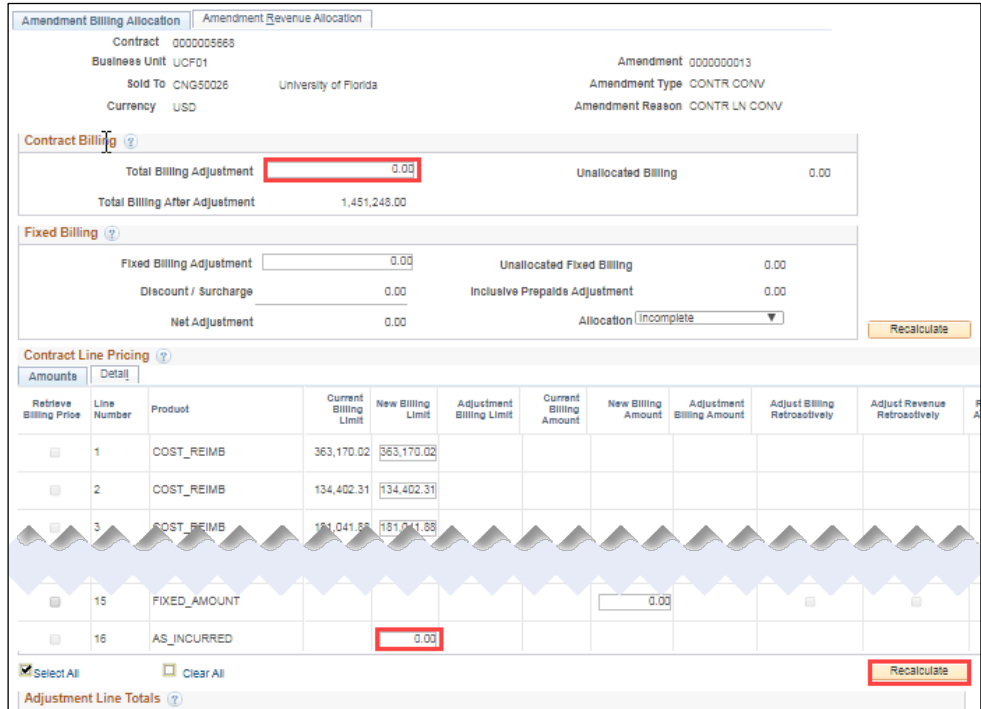
System Navigation for Grants

Step	Action												
6.	Select the Amendments tab.  <p>The screenshot shows a navigation menu with three tabs: 'General', 'Lines', and 'Amendments'. The 'Amendments' tab is highlighted with a red box. Below the tabs, the text 'Contract Number' and 'Amendment Number' is visible.</p>												
7.	Click the Amend Contract button.  <p>The screenshot shows the 'Amendments' tab selected. Below the tabs, the text 'Contract Number 00000' and 'Amendment Number 00000' is visible. At the bottom, the 'Amend Contract' button is highlighted with a red box.</p>												
8.	Enter values into the following fields: a) Amendment Type [Contract Adjustment] b) Reason [New Project Added]  <p>The screenshot shows a table titled 'Amendments' with columns: Amendment, Amendment Type, Reason, and *Process Date. The first row has '0000000013' in the Amendment column, 'Contract Adjustment' in the Amendment Type column, 'New Project Added' in the Reason column, and '10/01/2019' in the *Process Date column. The 'Contract Adjustment' and 'New Project Added' cells are highlighted with red boxes.</p> <table border="1"><thead><tr><th>Amendment</th><th>Amendment Type</th><th>Reason</th><th>*Process Date</th></tr></thead><tbody><tr><td>0000000013</td><td>Contract Adjustment</td><td>New Project Added</td><td>10/01/2019</td></tr><tr><td>0000000012</td><td>CONTR CONV</td><td>CONTR LN CONV</td><td>07/23/2019</td></tr></tbody></table>	Amendment	Amendment Type	Reason	*Process Date	0000000013	Contract Adjustment	New Project Added	10/01/2019	0000000012	CONTR CONV	CONTR LN CONV	07/23/2019
Amendment	Amendment Type	Reason	*Process Date										
0000000013	Contract Adjustment	New Project Added	10/01/2019										
0000000012	CONTR CONV	CONTR LN CONV	07/23/2019										
9.	Click Save .  <p>The screenshot shows a form with a 'Save' button highlighted with a red box. Other buttons include 'Return to Search' and 'Notify'. The text '0000000004' and 'ARGIS Interface Chg' is visible at the top. Below the buttons, the text 'Billing Plans', 'Revenue Plans', and 'Return to Award Profile' is visible.</p>												



UCF Financials

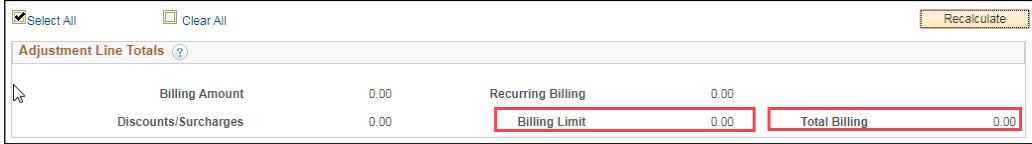
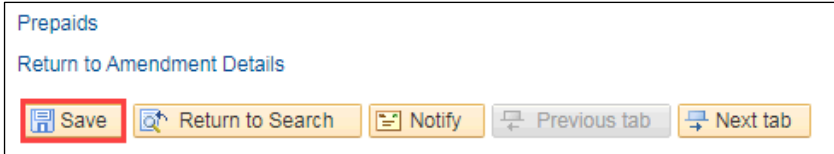
System Navigation for Grants

Sten	Action
10.	<p>Click the Detail link of the Amendment that is Pending.</p>  <p>The screenshot shows a table with columns: Amendment, Amendment Type, Reason, *Process Date, Amendment Status, Detail, and Notes. The row for Amendment 000000013 is highlighted, and its 'Detail' link is enclosed in a red box.</p>
11.	<p>Click the Amendment Amount Allocation link.</p>  <p>The screenshot shows a button labeled 'Amendment Amount Allocation' highlighted with a red box. Below it are 'Return to General Information', 'Save', 'Return to Search', and 'Notify' buttons.</p>
12.	<p>Reduce the limit to be equal to the sum of the total expenditures:</p> <ol style="list-style-type: none"> Total Billing Adjustment New Billing Limit  <p>The screenshot shows the 'Amendment Billing Allocation' page. It includes sections for Contract Billing, Fixed Billing, and Contract Line Pricing. In the Contract Billing section, the 'Total Billing Adjustment' field is set to 0.00 and highlighted with a red box. In the Contract Line Pricing table, the 'New Billing Limit' for line 16 (AS_INCURRED) is set to 0.00 and highlighted with a red box. A 'Recalculate' button is visible at the bottom right of the table.</p>
13.	<p>Click the second Recalculate button. (See the image in step 13.)</p>



UCF Financials

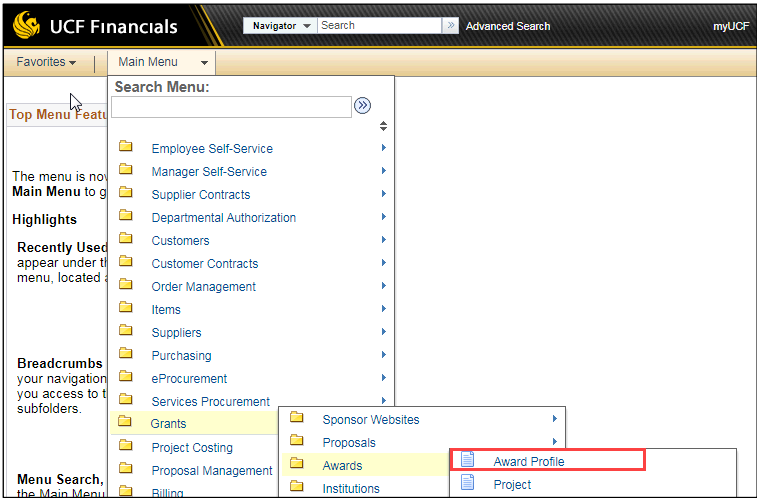
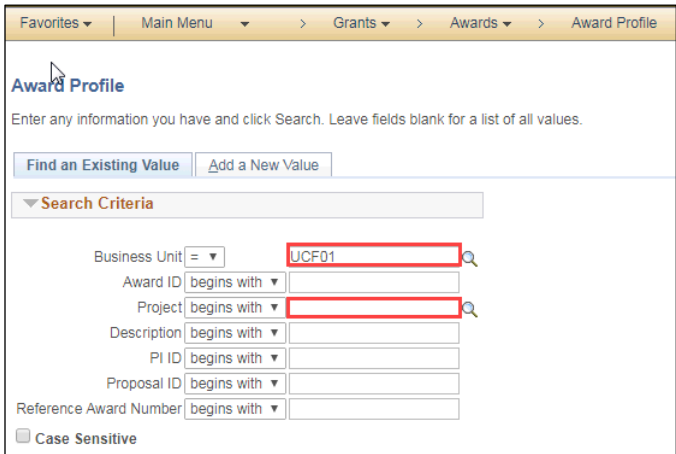
System Navigation for Grants

Step	Action															
14.	<p>Verify the Total Billing and Billing Limit.</p>  <p>The screenshot shows a table titled "Adjustment Line Totals" with the following data:</p> <table border="1"><thead><tr><th></th><th>Billing Amount</th><th>0.00</th><th>Recurring Billing</th><th>0.00</th></tr></thead><tbody><tr><td>Discounts/Surcharges</td><td>0.00</td><td></td><td>Billing Limit</td><td>0.00</td></tr><tr><td></td><td></td><td></td><td>Total Billing</td><td>0.00</td></tr></tbody></table>		Billing Amount	0.00	Recurring Billing	0.00	Discounts/Surcharges	0.00		Billing Limit	0.00				Total Billing	0.00
	Billing Amount	0.00	Recurring Billing	0.00												
Discounts/Surcharges	0.00		Billing Limit	0.00												
			Total Billing	0.00												
15.	<p>Click Save.</p>  <p>The screenshot shows a "Prepays" section with a "Return to Amendment Details" link and a row of buttons: "Save", "Return to Search", "Notify", "Previous tab", and "Next tab". The "Save" button is highlighted with a red box.</p>															
16.	<p>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.”</p>															
17.	<p><i>Note: Budget lines should never be deleted after they have been finalized. Create new lines and negative amounts to reduce budget lines when necessary.</i></p>															



VIII. PERFORM LIMIT CHECKING

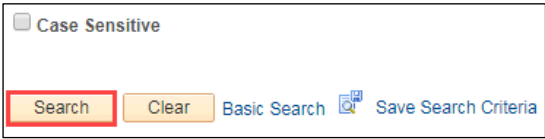
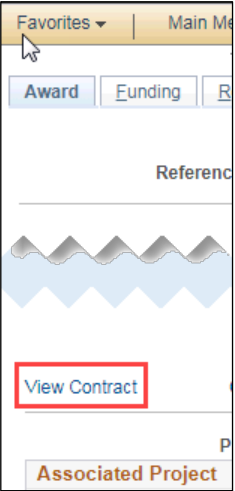

The Billing Limit has been altered enough to ensure the over-the-limit (OLT) lines fall within the limit. Before billing can be processed, the Contract Line needs to be repriced. To do so, follow these steps:

Step	Action
1.	<p>Navigate to Main Menu > Grants > Awards > Award Profile.</p>  <p>(Alternately, navigate to Main Menu > Customer Contracts > Create and Amend > General Information.)</p>
2.	<p>Enter values in the following fields:</p> <ul style="list-style-type: none">a) Business Unitb) Project (Project ID) 



UCF Financials

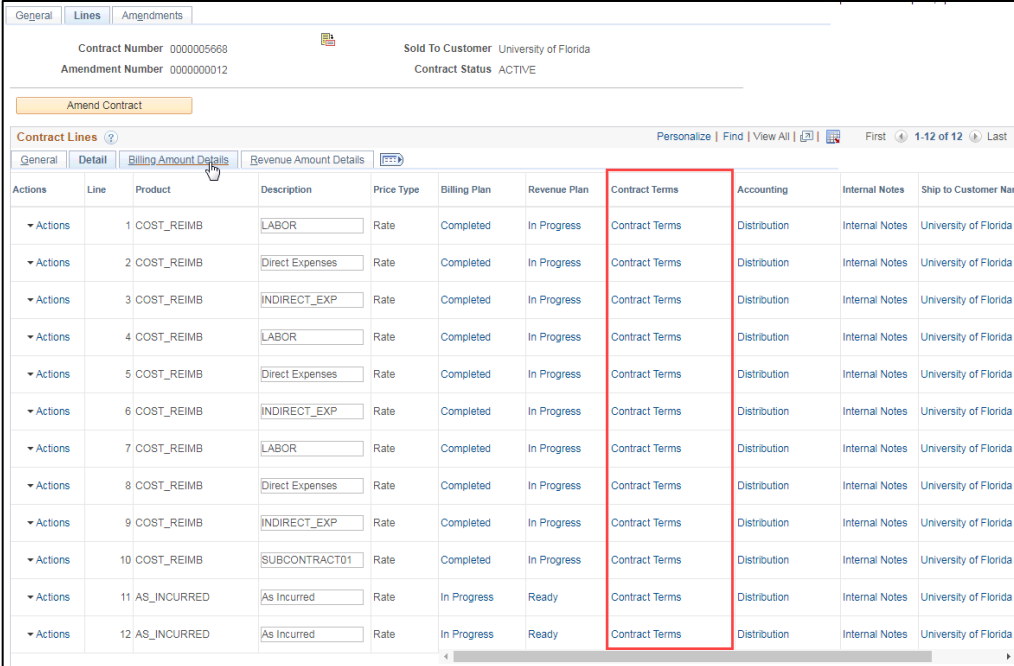
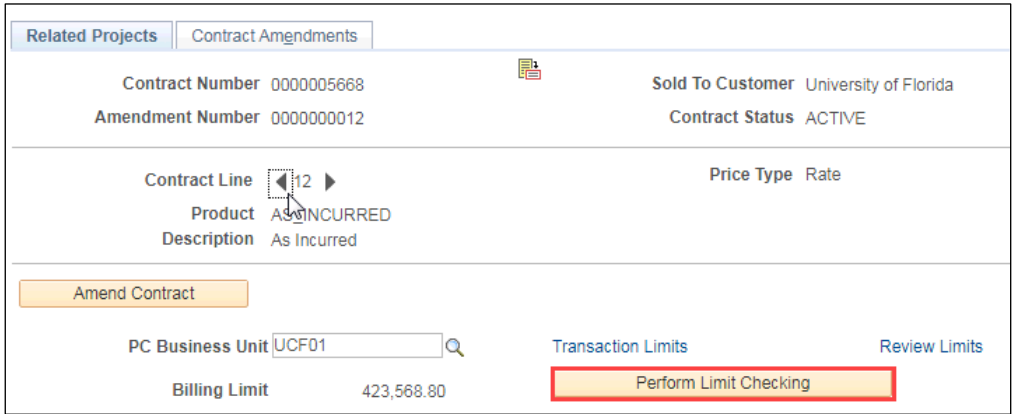
System Navigation for Grants

Step	Action
3.	<p>Click Search.</p>  <p>A screenshot of a search interface. At the top left, there is a checkbox labeled "Case Sensitive". Below it, there are three buttons: "Search" (highlighted with a red border), "Clear", and "Basic Search". To the right of "Basic Search" is a small icon and the text "Save Search Criteria".</p>
4.	Select the correct award if it doesn't default.
5.	Click the View Contract link.
	 <p>A screenshot of a web page showing award details. At the top, there are tabs for "Award", "Funding", and "References". Below the tabs, there is a section titled "References" with a decorative wavy border. At the bottom of this section, there is a link labeled "View Contract" (highlighted with a red border). Below the "View Contract" link, there is a section titled "Associated Project".</p>
6.	Select the Lines tab.
	 <p>A screenshot of a tabbed interface. There are three tabs: "General", "Lines" (highlighted with a red border), and "Amendments".</p>



UCF Financials

System Navigation for Grants

Step	Action																																																																																																																																															
7.	<p>On the Detail tab under the Contract Lines heading, select the Contract Terms link under the Contract Terms heading.</p>  <table border="1"><thead><tr><th>Actions</th><th>Line</th><th>Product</th><th>Description</th><th>Price Type</th><th>Billing Plan</th><th>Revenue Plan</th><th>Contract Terms</th><th>Accounting</th><th>Internal Notes</th><th>Ship to Customer Name</th></tr></thead><tbody><tr><td>▼ Actions</td><td>1</td><td>COST_REIMB</td><td>LABOR</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>2</td><td>COST_REIMB</td><td>Direct Expenses</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>3</td><td>COST_REIMB</td><td>INDIRECT_EXP</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>4</td><td>COST_REIMB</td><td>LABOR</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>5</td><td>COST_REIMB</td><td>Direct Expenses</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>6</td><td>COST_REIMB</td><td>INDIRECT_EXP</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>7</td><td>COST_REIMB</td><td>LABOR</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>8</td><td>COST_REIMB</td><td>Direct Expenses</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>9</td><td>COST_REIMB</td><td>INDIRECT_EXP</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>10</td><td>COST_REIMB</td><td>SUBCONTRACT01</td><td>Rate</td><td>Completed</td><td>In Progress</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>11</td><td>AS_INCURRED</td><td>As Incurred</td><td>Rate</td><td>In Progress</td><td>Ready</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr><tr><td>▼ Actions</td><td>12</td><td>AS_INCURRED</td><td>As Incurred</td><td>Rate</td><td>In Progress</td><td>Ready</td><td>Contract Terms</td><td>Distribution</td><td>Internal Notes</td><td>University of Florida</td></tr></tbody></table>	Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name	▼ Actions	1	COST_REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida	▼ Actions	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	▼ Actions	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	▼ Actions	12	AS_INCURRED	As Incurred	Rate	In Progress	Ready	Contract Terms	Distribution	Internal Notes	University of Florida
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name																																																																																																																																						
▼ Actions	1	COST_REIMB	LABOR	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida																																																																																																																																						
▼ Actions	2	COST_REIMB	Direct Expenses	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	University of Florida																																																																																																																																						
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▼ 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																																																																																																																																						
▼ Actions	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																																																																																																																																						
▼ Actions	12	AS_INCURRED	As Incurred	Rate	In Progress	Ready	Contract Terms	Distribution	Internal Notes	University of Florida																																																																																																																																						
8.	<p>Click Perform Limit Checking.</p>  <table border="1"><thead><tr><th>Contract Line</th><th>Product</th><th>Description</th><th>Price Type</th></tr></thead><tbody><tr><td>12</td><td>AS INCURRED</td><td>As Incurred</td><td>Rate</td></tr></tbody></table> <p>PC Business Unit: UCF01 Billing Limit: 423,568.80 Transaction Limits: Perform Limit Checking (highlighted) Review Limits</p>	Contract Line	Product	Description	Price Type	12	AS INCURRED	As Incurred	Rate																																																																																																																																							
Contract Line	Product	Description	Price Type																																																																																																																																													
12	AS INCURRED	As Incurred	Rate																																																																																																																																													



IX. RUN PRICING

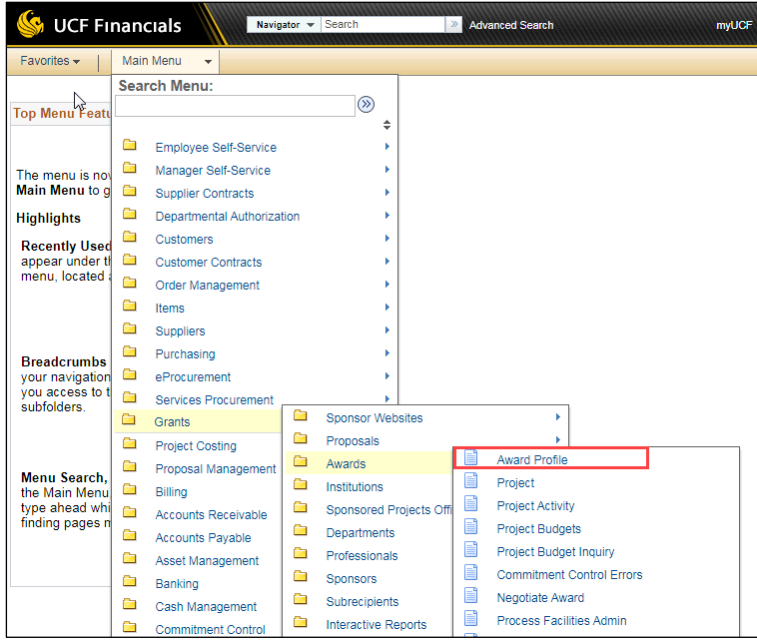
If the billing limit change is altered enough to ensure some OLTs fall within the billing limit and many contracts need to be repriced, do the following to process billing:

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: <ul style="list-style-type: none">a) Option [Business Unit/Project/Activity]b) Business Unitc) Projectd) Activitye) Date Option [All] <p><i>Application Options</i></p> <ul style="list-style-type: none">a) Reprice Rows [Check]b) Price unpriced Rows [Check]c) Recalculate Tiered Pricing [Check] <p><i>Pricing Options</i></p> <ul style="list-style-type: none">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

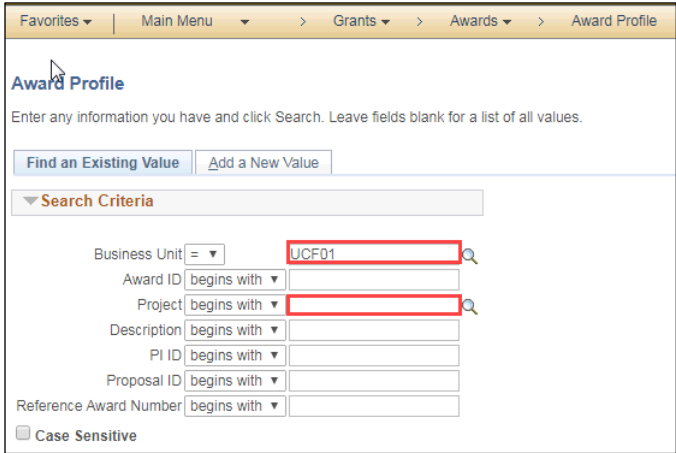
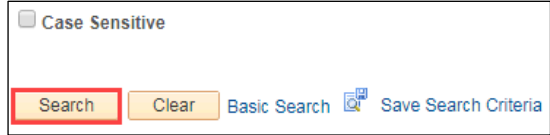
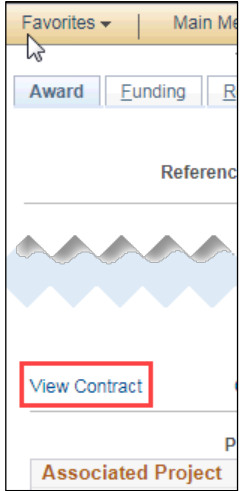
If a department requested that the budget be amended before an award modification is approved, the department must be willing to take the financial risk if the amendment is not approved. The project that will have a budget entered preemptively needs to be moved to a separate contract line to ensure the 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):

Step	Action
1.	<p>Navigate to Main Menu > Grants > Awards > Award Profile.</p>  <p>The screenshot shows the UCF Financials interface. The 'Main Menu' is expanded to show a list of categories. 'Grants' is selected, and its sub-menu is displayed. 'Awards' is selected, and its sub-menu is displayed. 'Award Profile' is highlighted with a red box.</p>



UCF Financials


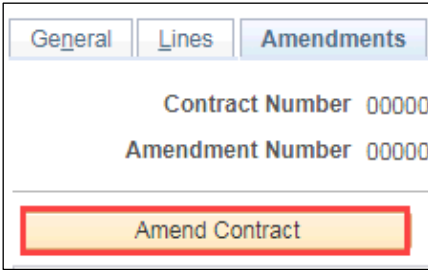
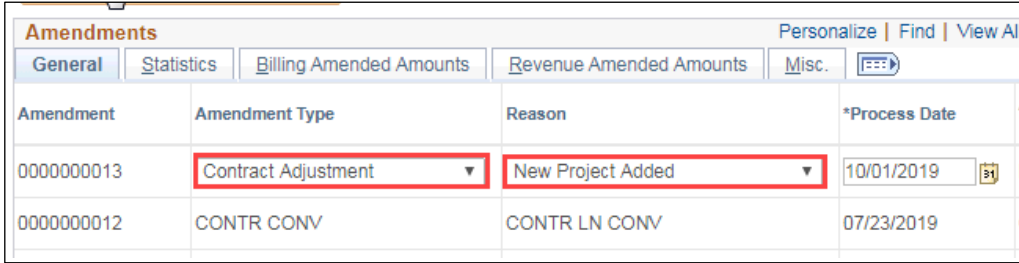
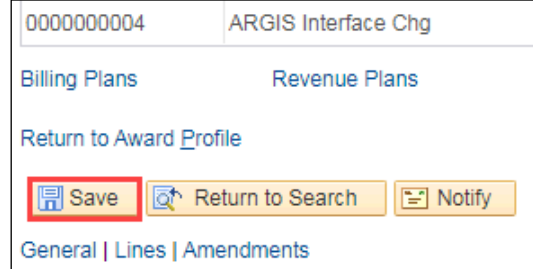
System Navigation for Grants

Step	Action
2.	<p>Enter values in the following fields:</p> <ul style="list-style-type: none">a) Business Unitb) Project (Project ID) 
3.	<p>Click Search.</p> 
4.	<p>Click the View Contract link.</p> 



UCF Financials

System Navigation for Grants

Step	Action
5.	Select the Amendments tab. 
6.	Click the Amend Contract button. 
7.	Click View All .
8.	Enter values into the following fields: a) Amendment Type [Contract Adjustment] b) Reason 
9.	Click Save . 



UCF Financials

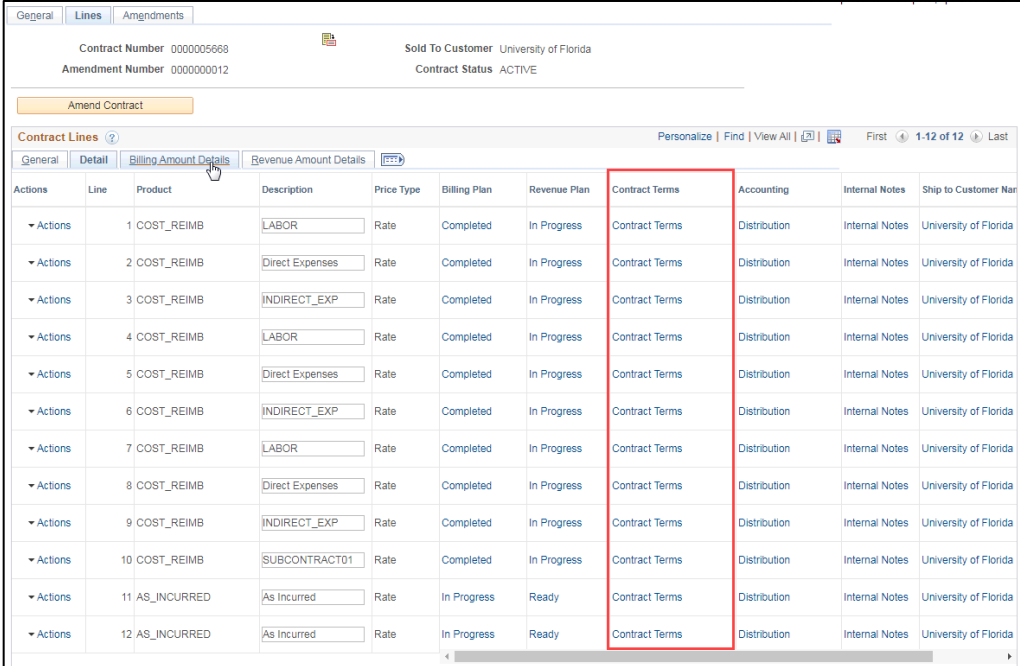
System Navigation for Grants

Step	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] <i>Note: Hold Billing on Unpaid Cost and Hold Revenue on Unpaid Cost should not be checked. Contact your manager if they are.</i>
19.	Click Save .



UCF Financials

System Navigation for Grants

Step	Action
20.	<p>On the Detail tab under the Contract Lines heading, select the Contract Terms link under the Contract Terms heading.</p> 
21.	Remove the project from the contract line using the minus sign (-) , but note the Project number as it will need to be associated with the new Line .
22.	Click OK .
23.	Click OK .
24.	Click Save .
25.	Click the right arrow (>) to go to the new contract Line .
26.	<p>Enter the following as required:</p> <ul style="list-style-type: none"> a) PC Business Unit b) Rate Set [GM_RATE, GM_RATE_TM] c) Project d) Activity [GRANT]
27.	Click Save .



Step	Action
28.	Click the Return to General Information link.
29.	Click Amend Contract .
30.	Click OK . <i>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.</i>
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: <ul style="list-style-type: none">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.	<i>Note: The following section is for Fixed only.</i> Select the Lines tab.



Sten	Action
42.	Select the Detail tab.
43.	Select the Distribution link in the Accounting column.
44.	<p>Enter the following:</p> <p><i>Revenue</i></p> <ul style="list-style-type: none">a) Distribution Code [REV-[Project Type]]*b) Account (defaults)c) Project (Enter associated project.)d) Funde) Program <p><i>Contract Asset</i></p> <ul style="list-style-type: none">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) Fundf) Program <p>*Use list Q.</p>
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.



Step	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.	<p>Navigate to Main Menu > Grants > Awards > Award Profile.</p>  <p>The screenshot shows the UCF Financials interface. At the top, there is a 'Main Menu' dropdown. Below it, a search menu is open, displaying a list of categories. The 'Grants' category is highlighted in yellow. A sub-menu is open for 'Grants', showing 'Awards' highlighted in yellow. A further sub-menu is open for 'Awards', with 'Award Profile' highlighted in a red box. Other options in the 'Awards' sub-menu include Project, Project Activity, Project Budgets, Project Budget Inquiry, Commitment Control Errors, Negotiate Award, and Process Facilities Admin.</p>
2.	<p>Notify the department to get expenditures posted to the project or give them time to get a no-cost extension.</p>



XII. MILESTONE COMPLETION

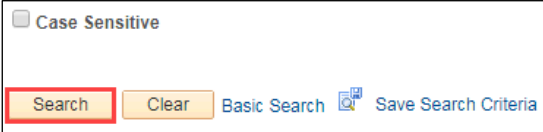

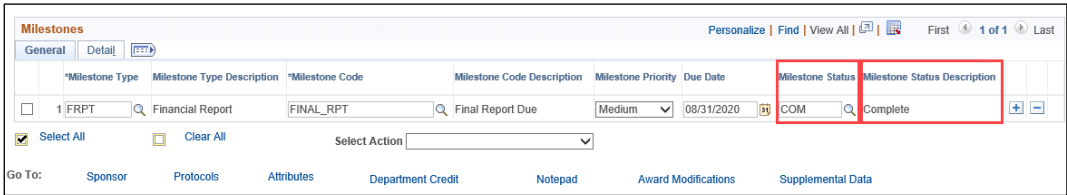
When Milestones have been used and updated but the award date has passed and the award will not be extended, do the following to update Milestones so that final reports can be rendered.

Step	Action
3.	<p>Navigate to Main Menu > Grants > Awards > Award Profile.</p> 
4.	<p>Enter values in the following fields:</p> <ol style="list-style-type: none"> Business Unit Project (Project ID) 



UCF Financials

System Navigation for Grants

Step	Action
5.	<p>Click Search.</p> 
6.	<p>Select the Milestones link.</p> 
7.	<p>Verify that all Milestones have a status of Complete.</p> 
8.	<p>Ensure that all Milestones and Deliverables have been met in the Huron Research Suite (HRS) system.</p>



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: <ul style="list-style-type: none">a) Final Financial Reportb) Final Narrative Reportc) SF-425 Federal Financial Report



XV. MOVE RESIDUAL FUNDS

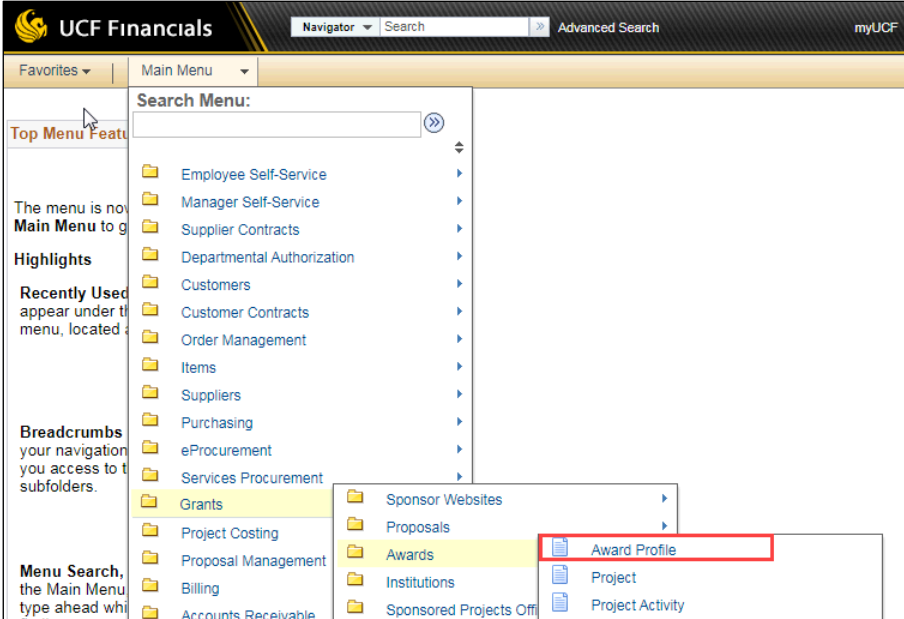
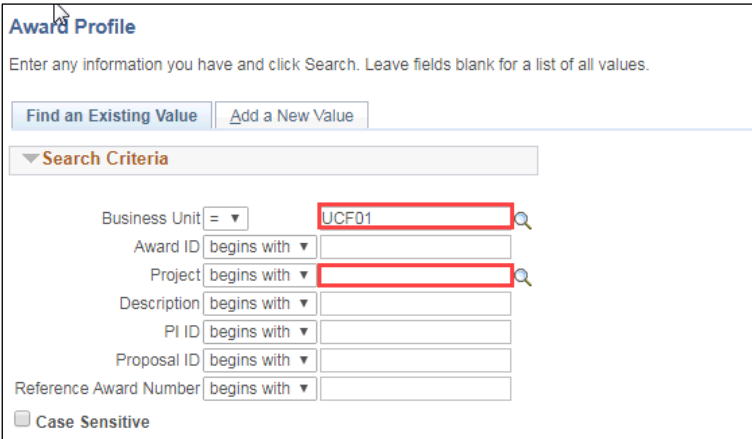
If after final billing has been completed, users find that the project received more money than was spent on expenditures, the university is allowed to keep the remaining money. Before the award is closed, the following tasks should be completed:

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

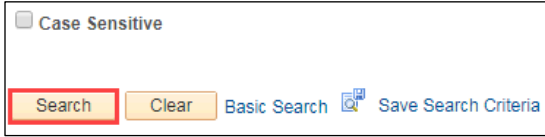
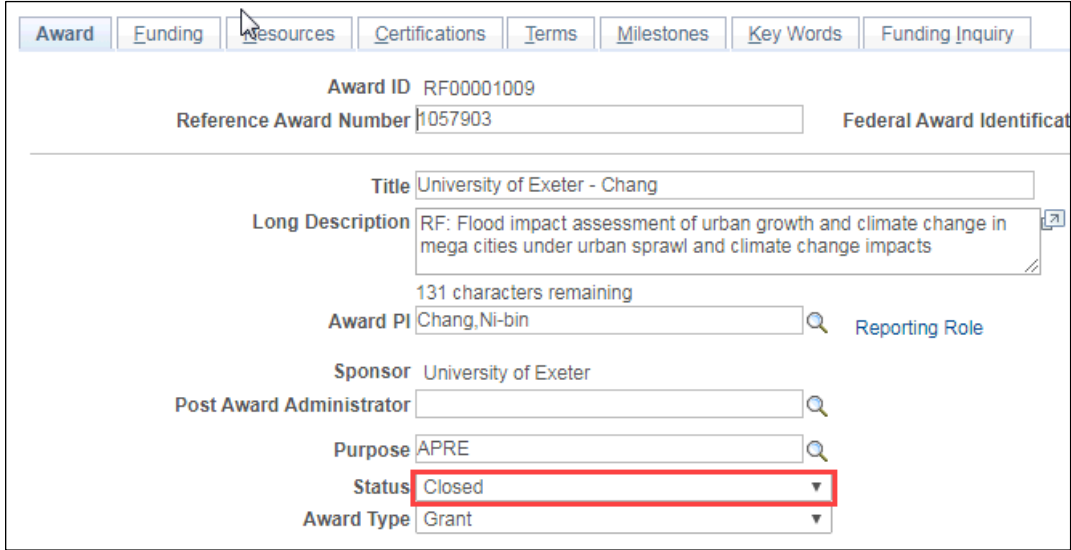
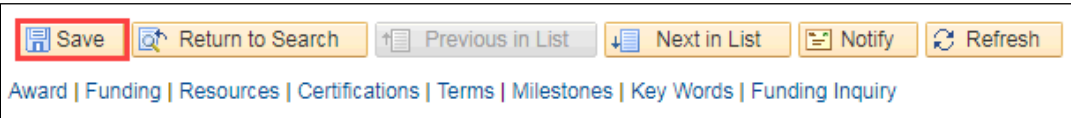

Once issues arising from the project analysis have been resolved, final reports and invoices must be sent. Follow these steps:

Step	Action
1.	<p>Navigate to Main Menu > Grants > Award > Award Profile.</p> 
2.	<p>Enter the following:</p> <ul style="list-style-type: none"> a) Business Unit b) Project (Project ID) 



UCF Financials


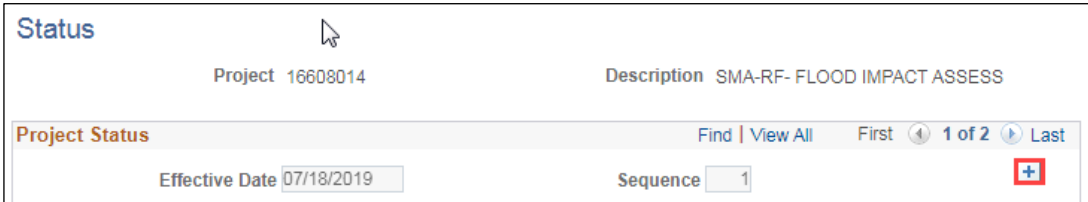
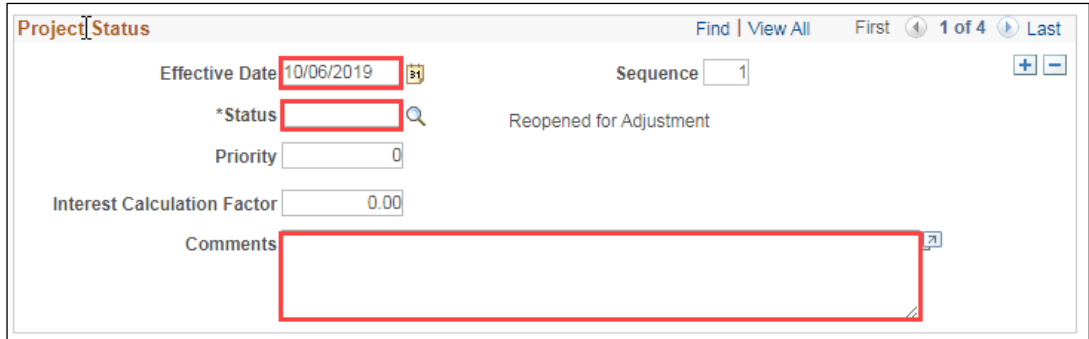
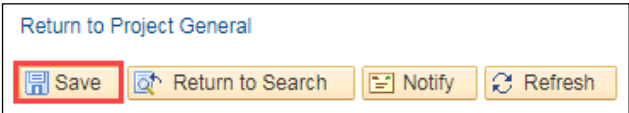
System Navigation for Grants

Step	Action												
3.	<p>Click Search.</p> 												
4.	<p>Update Award Status to Closed.</p> 												
5.	<p>Click Save.</p> 												
6.	<p>Under the Associated Project heading, click the correct Project ID link in the Project column.</p>  <table border="1"><thead><tr><th colspan="3">Associated Project</th></tr><tr><th>PC Business Unit</th><th>Project</th><th>Description</th></tr></thead><tbody><tr><td>RFD01</td><td>16608014</td><td>SMA-RF- FLOOD IMPACT ASSESS</td></tr><tr><td>RFD01</td><td>16609914</td><td>SMA-RF MATCH-FLOOD IMPACT ASSE</td></tr></tbody></table>	Associated Project			PC Business Unit	Project	Description	RFD01	16608014	SMA-RF- FLOOD IMPACT ASSESS	RFD01	16609914	SMA-RF MATCH-FLOOD IMPACT ASSE
Associated Project													
PC Business Unit	Project	Description											
RFD01	16608014	SMA-RF- FLOOD IMPACT ASSESS											
RFD01	16609914	SMA-RF MATCH-FLOOD IMPACT ASSE											



UCF Financials

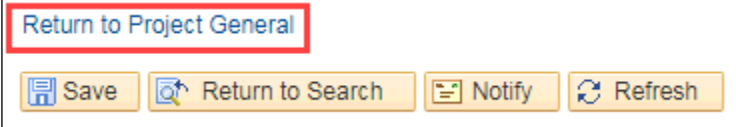
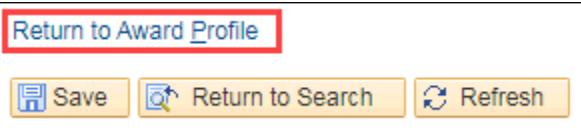
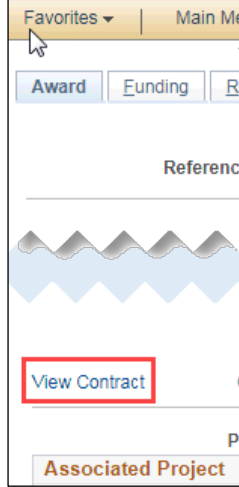
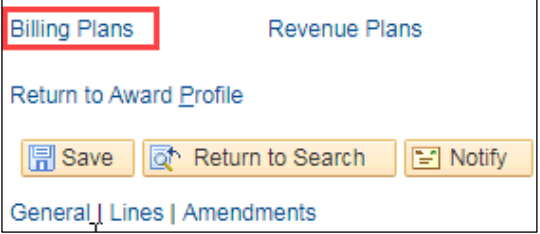
System Navigation for Grants

Step	Action
7.	<p>Click the Project Status link. The link should display as Open or Reopened for Adjustment.</p> 
8.	<p>On the Status page add another row.</p> 
9.	<p>Enter values in the following fields:</p> <ul style="list-style-type: none">a) Effective Dateb) Status [F – Financially Closed (stops all transactions)]c) Comments 
10.	<p>Click Save.</p> 



UCF Financials


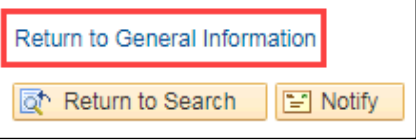
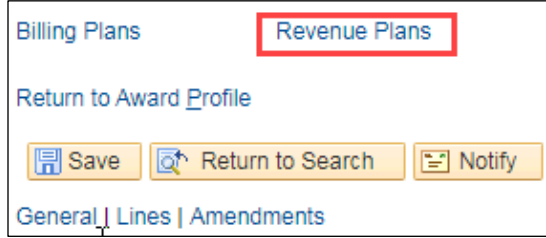

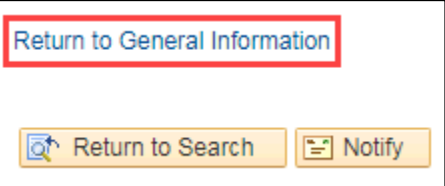
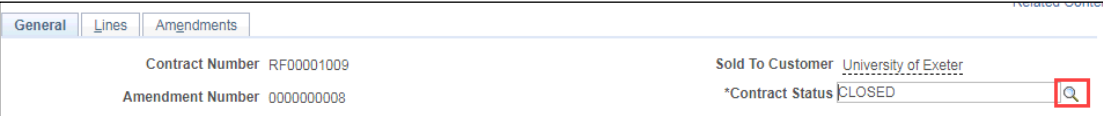
System Navigation for Grants

Step	Action
11.	<p>Click Return to Project General.</p> 
12.	<p>Click Return to Award Profile.</p> 
13.	<p>Click the View Contract link.</p> 
14.	<p>Click the Billing Plans link at the bottom of the page.</p> 



UCF Financials

System Navigation for Grants

Sten	Action																														
15.	<p>Ensure Billing Status on all lines is Completed.</p>  <table border="1"> <thead> <tr> <th>Line</th> <th>Product</th> <th>Line Description</th> <th>Billing Amount</th> <th>Price Type</th> <th>Fee Type</th> <th>Plan</th> <th>Plan Description</th> <th>Billing Method</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>COST_REIMB</td> <td>Direct Expenses</td> <td></td> <td>Rate</td> <td>None</td> <td>B101</td> <td>8244/COST_REIMB Bill Plan</td> <td>As Incurred</td> <td>Completed</td> </tr> <tr> <td>3</td> <td>COST_REIMB</td> <td>INDIRECT_EXP</td> <td></td> <td>Rate</td> <td>None</td> <td>B101</td> <td>8244/COST_REIMB Bill Plan</td> <td>As Incurred</td> <td>Completed</td> </tr> </tbody> </table>	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
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3	COST_REIMB	INDIRECT_EXP		Rate	None	B101	8244/COST_REIMB Bill Plan	As Incurred	Completed																						
16.	<p>Click the Return to General Information link.</p> 																														
17.	<p>Click the Revenue Plans link at the bottom of the page.</p> 																														
18.	<p>Ensure plan Status is Completed.</p>  <table border="1"> <thead> <tr> <th>Line</th> <th>Product</th> <th>Description</th> <th>Revenue Amount</th> <th>Price Type</th> <th>Fee Type</th> <th>Plan</th> <th>Plan Description</th> <th>Revenue Method</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>COST_REIMB</td> <td>Direct Expenses</td> <td></td> <td>Rate</td> <td>None</td> <td>R101</td> <td>Revenue Plan</td> <td>As Incurred</td> <td>Completed</td> </tr> <tr> <td>3</td> <td>COST_REIMB</td> <td>INDIRECT_EXP</td> <td></td> <td>Rate</td> <td>None</td> <td>R101</td> <td>Revenue Plan</td> <td>As Incurred</td> <td>Completed</td> </tr> </tbody> </table>	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
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.	<p>Click the Return to General Information link.</p> 																														
20.	<p>Click the magnifying glass icon by the Contract Status field. The Look UP Contract Status field displays.</p> 																														



UCF Financials

System Navigation for Grants

Step	Action												
21.	<p>Update Contract Status to Financially Closed.</p> <div data-bbox="315 384 922 848"><p>Look Up Contract Status</p><p>SetID UCF01</p><p>Contract Status begins with <input type="text"/></p><p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> Basic Lookup</p><p>Search Results</p><p>View 100 First 1-3 of 3 Last</p><table border="1"><thead><tr><th>Contract Status</th><th>Description</th><th>Processing Status</th></tr></thead><tbody><tr><td>ACTIVE</td><td>Active</td><td>Active</td></tr><tr><td>CLOSED</td><td>Closed</td><td>Active</td></tr><tr><td>FIN_CLOSED</td><td>Financially Closed</td><td>Active</td></tr></tbody></table></div>	Contract Status	Description	Processing Status	ACTIVE	Active	Active	CLOSED	Closed	Active	FIN_CLOSED	Financially Closed	Active
Contract Status	Description	Processing Status											
ACTIVE	Active	Active											
CLOSED	Closed	Active											
FIN_CLOSED	Financially Closed	Active											
22.	<p>Click Save.</p> <div data-bbox="321 942 862 1104"><p>Return to Award Profile</p><p><input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/></p><p>General Lines Amendments</p></div>												



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.