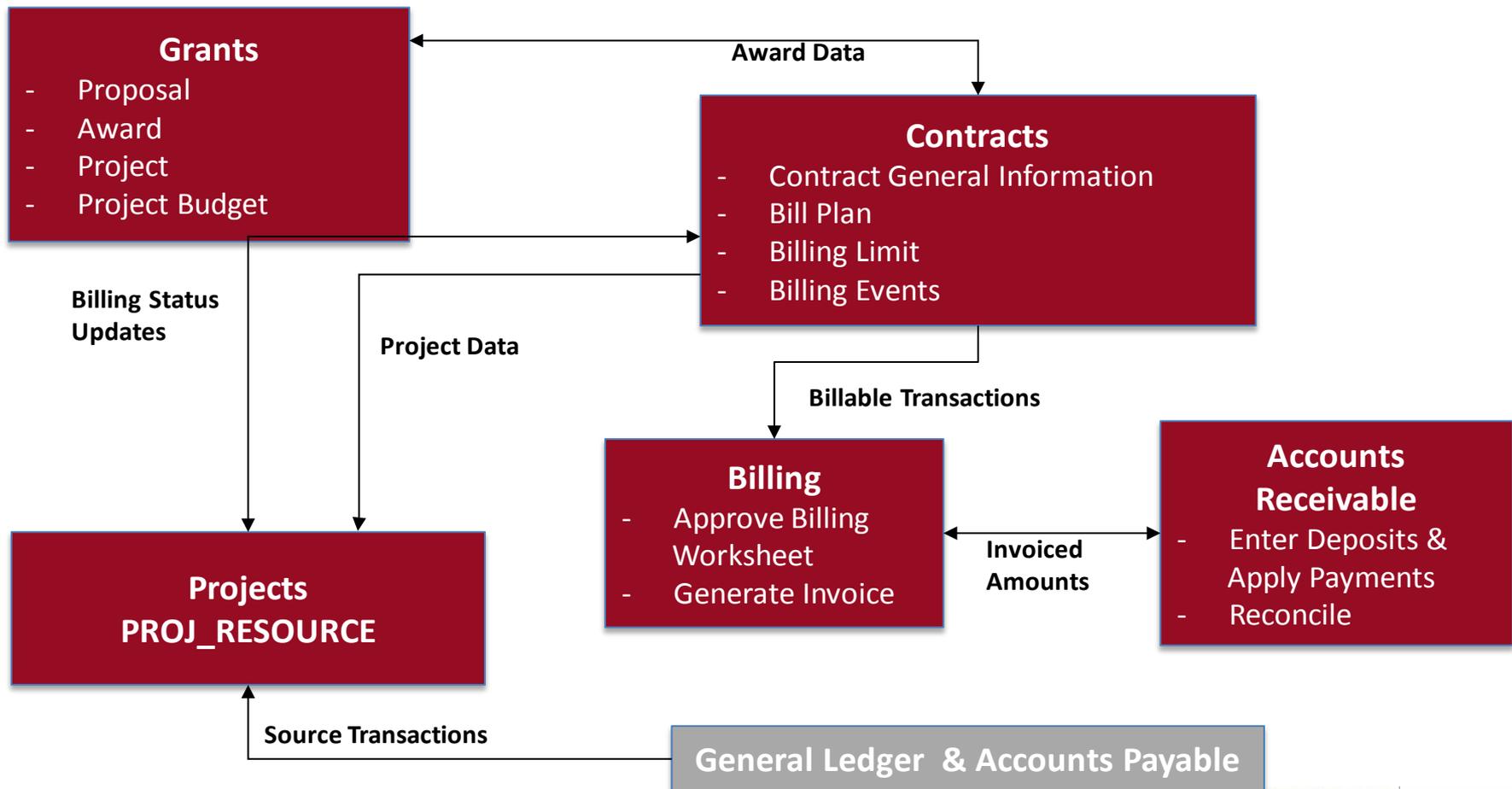


PeopleSoft Grants

3/3/2017

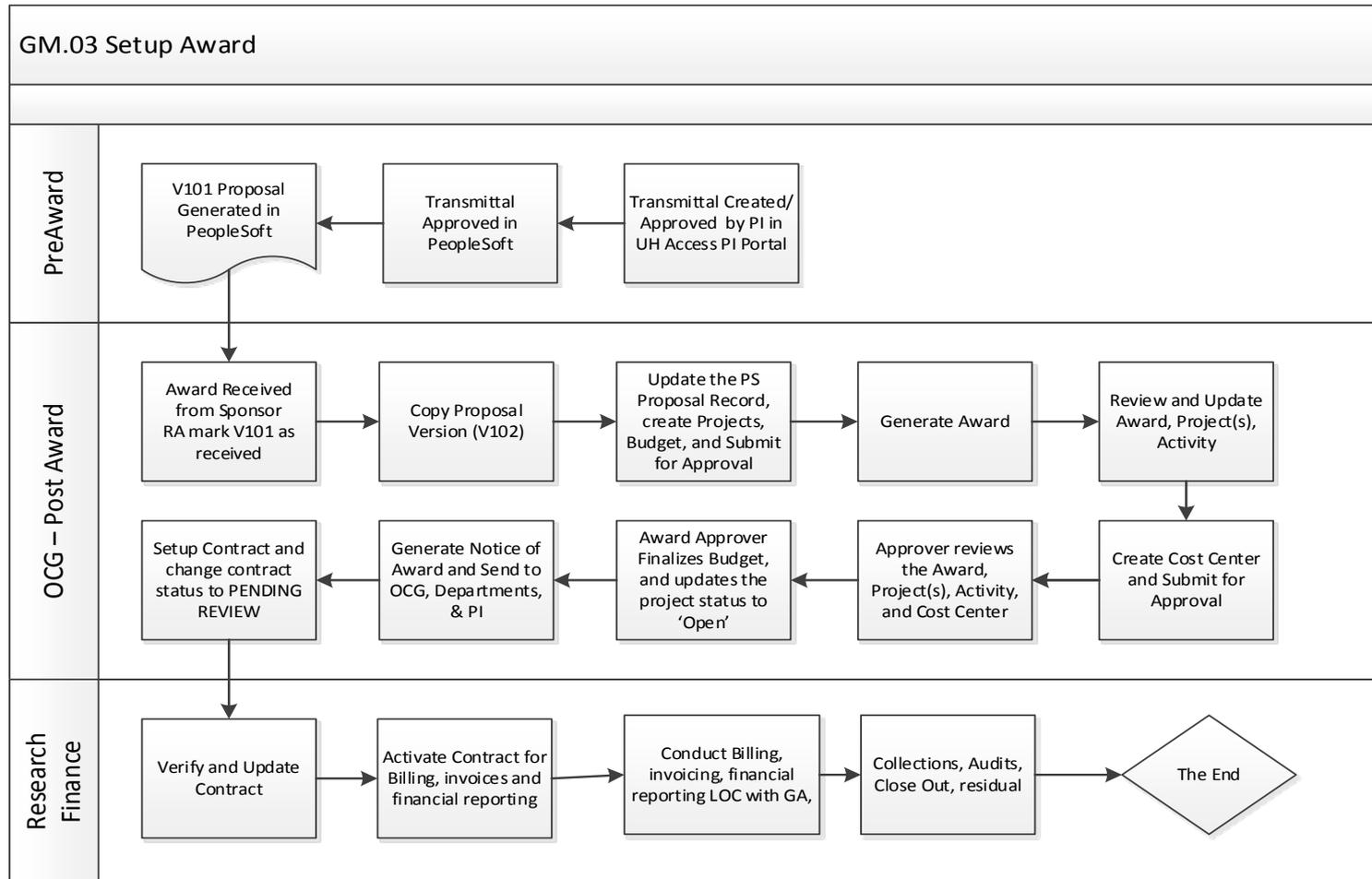
3/1/2017	Phase 1 cutover initiated.
3/6/2017	OCG stops creating sponsored project cost centers and/or modifications in PS finance
3/13/2017	UH IT will setup award profiles in PS Grants for project cost centers in RD2K as of 3/6/2017 and will move proposals approved in RD2K as of 3/13/2017 into PS Grants production.
3/13/2017	OCG Research Administrators (RA) will begin to setup awards and process modifications to awards in PS Grants.
3/13/2017	Department users will have view access to PS grants award management proposal, award and project information.

Grants Suite Modules Overview



High Level Overview

High Level Business Process



The Process

Initiate Proposal from Transmittal

Establish Award Budget

Generate an Award

Setup Award and Project(s)

Create Cost Center(s)

Proposal Profile View

Navigation: Grants > Proposal > Maintain Proposal

The screenshot displays the 'Proposal Profile View' interface. At the top, there are tabs for Proposal, Projects, Budgets, Resources, Certifications, Reports, and Attachments. The main form contains the following fields:

- Proposal ID: 104212, Transmittal ID: (blank), Version ID: V101
- Description: Charter School: Foun x, Currency: USD
- Allow Multiple PI's, Add to My Proposals button
- *Title: Charter School: Foundation Fund Program Fund TEA, View Documents button
- Long Description: Charter School: Foundation Fund Program Fund TEA
- *Contact PI: 0026726 Black, Carolyn
- *Sponsor ID: 100045 Texas Education Agency
- Pre-Award Administrator: 0904777 McGuire, Denise LaShaun
- Post-Award Administrator: 0080549 Philbert, Melanese Alicia
- Purpose: 3000 Public Service (Cxxxx)
- *Proposal Type: New
- Flow Thru: 100047 State of Texas
- Confidence %: (blank)
- CFDA: (blank)
- Status: *Proposal Status: Awarded, Submit Status: Submitted, Generate Status: Contract Generated, In Approval Process
- Facilities & Admin Requested, Foreign Application/Component, NIH Modular Grant
- Last Updated: 01/17/, Last Update User ID: Soon

Below the main form, there are tabs for Due By, Budget Express, Additional Information, and FA Split %. The *Start Date is 09/01/2011 and *End Date is 11/30/2017. A 'Build Periods' button is present.

The 'Budget Periods' table is shown below:

Period	*Start Date	*End Date	Target Sponsor Budget
1	09/01/2011	11/30/2017	

At the bottom, there are tabs for Details, PHS Incomes, and a 'Personalize | Find | First 1 of 1 Last' navigation bar. A 'Go To:' section includes Location, Protocols, Component, Setup Level, Keywords, Gender & Minority Study, Trainee, and Attributes.

Information on the proposal profile comes from the associated transmittal.

Converted proposals with existing awards will have a *proposal status of "Awarded"* and will have a proposal version as *Version ID "V101"*.

Converted proposals with no award yet issued will have a proposal status of *"Pending"* and will have a proposal version as *Version ID "V101"*.

Proposal and Award Structure

Proposal: Information about the UH researcher's proposal that was submitted to a sponsor for funding.

Award: Demographic and administrative information received from the sponsor, forms the basis of billing, revenue recognition and stores award attributes. Each Award must have at least one associated Project.

Proposal
Award
100006

Project:

Information on the Award's funding.
An Award may house multiple Projects.

Project
G100006

Project
G100007

Proposal and Award Setup

One to many relationship

In PS Grants, there will be one proposal related to one award that can be related to multiple projects.

Why would a proposal and the related award have more than one project cost center?

- Different F&A Rates on an Award
- Different PI's
- Different Departments
- Different tasks to account separately for
- Separate reporting periods that require funds to be budgeted and reported separately
- Restricted Carry Forward from one year to another

Proposal Profile View

Information on Tabs and Links

OCG – PostAward

Proposal	The Proposal tab provides information about the proposal including: title, primary PI, sponsor, assigned research administrators, and proposal status
Projects	The Projects tab provides information that is unique and specific to each project (cost center) including: project title and primary department
Budgets	The Budgets tab provides allows the OCG post award RA to enter detailed budgets. UH is working on a print version for department view.
Resources	The Resources tab provides information about sub recipients and co-investigators (if any). Additional team members involved on the award can be listed under Professional.
Certifications	The Certification tab allows the OCG post award RA to enter certifications and compliance approvals needed for the award, such as IRB and IACUC.
Reports	The Reports tab allows the OCG post award RA to enter proposal abstract text for reporting purposes.
Attachments	UH will not use this tab. A customized file storage that the user can accessed by clicking on the View Documents button on the Proposal tab.

Proposal Profile View

Information on Tabs and Links

OCG – PostAward

Due By	The Due By link provides information regarding the deadline for proposal submission as directed by the sponsor.
Budget Express	The OCG post award RA will enter the entire award amount and IDC for reporting purposes.
Additional Information	The OCG post award RA will enter additional information including flow-through sponsor and cost sharing.
FA Split%	The F&A Split % link shows how the IDC distribution that will be returned is split amongst the listed investigators by projects.
Location	The Location link allows UH to track the research location on private funding in order to comply with SAM policy regarding sponsored research in bonded buildings.
Protocols, Component, Setup Level, Keywords, Gender & Minority Study, Trainee	UH will not use these links.
Attributes	The Attributes link allows a specific research attribute to be added based on type, such as Cancer, Energy and is also used to identify Non Standard IP and Sponsor Owned Equipment.

Award Profile View

Navigation: Grants > Awards > Award Profile

Oracle
FS91TST Last Refreshed on: Thu, Jan 12, 2017

Navigation: Favorites | Main Menu | Grants > Awards > Award Profile

Award | Funding | Resources | Certifications | Terms | Milestones | Funding Inquiry

Award ID: 104212
Reference Award Number: 104212

Title: Charter School: Foundation Fund Program Fund TEA [View Documents](#)
Long Description: Charter School: Foundation Fund Program Fund TEA
*Contact PI: Black,Carolyn [Reporting Role](#)
Sponsor: Texas Education Agency
Post Award Administrator:
Billing Specialist: Grace Rosanes
Purpose: 3000
Status: Accepted
Award Type: Grant
CFDA:
Proposal ID: 104212
Version ID: V101
Start Date: 09/01/2011
End Date: 11/30/2017 [Award Generation Date: 01/18/2017](#)

[View Contract](#) [View Proposal](#) [Additional Information](#) [Grant Administrator](#) [Sponsor Website](#) [Manage Dates](#) [FA Split %](#)

Associated Project [Personalize](#) | [Find](#) | [First](#) | [1-7 of 7](#) | [Last](#)

PC Business Unit	Project	Description	Primary Department RA
00730	C104212	Charter School: Foundation Fun	Paquin,Patricia
00730	C104213	Charter School: Foundation Fun	Paquin,Patricia
00730	C104214	Charter School: Foundation Fun	Paquin,Patricia
00730	C104215	Charter School: Foundation Fun	Paquin,Patricia
00730	C104216	Charter School: Foundation Fun	Paquin,Patricia
00730	C109231	Charter School: Foundation Fun	Paquin,Patricia
00730	C109232	Charter School: Foundation Fun	Paquin,Patricia

Go To: [Sponsor](#) [Protocols](#) [Attributes](#) [Department Credit](#) [Notepad](#) [Award Modifications](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#)

Award Profile View

Information on Tabs and Links

OCG – PostAward

Award	The Award tab provides information about the award including: title, primary PI, sponsor, assigned OCG administrators, award start and end dates. The Associated Projects are listed on the second part of the Award tab and include the Description (title) and Primary Department Contact for each.
Funding	The Funding tab provides the funded amount and start and end dates for each project. The Posting and Distribution status identify whether a budget has posted to the identified project cost center.
Resources	The Resources tab provides information about any approved sub recipients.
Certifications	The Certification tab allows the OCG post award RA to enter certifications and compliance approvals needed for the award, such as IRB and IACUC.
Terms	The Terms tab allows the OCG post award RA to enter award specific terms and conditions governing the award.
Milestones	The Milestones tab allows the OCG post award RA to enter reporting requirements included on the award, including report types and frequency. Additional information can be added in the comments for each Milestone.
Key Words, Protocols	UH will not use these tabs.
Funding Inquiry	The Funding Inquiry tab shows amounts for the total award, including: Projected Award Amount (anticipated total for the entire award), Reported Award Amount (total amount received from the sponsor), Posted Budget Amount (total budget posted to the general ledger for spending) and Limit Amount (total amount approved by sponsor).

Award Profile View

Information on Tabs and Links

OCG – PostAward

Funding Inquiry	The Funding Inquiry tab also shows the funded and posted amounts for each project under the award.
Additional Information	The OCG post award RA will enter additional information including flow-through sponsor and cost sharing.
Grant Administrator	The Grant Administrator link shows the contact information for the assigned department administrator for the award.
Sponsor Website	The Sponsor Website link shows the Sponsor's URL Address and website name.
Manage Dates	The Manage Dates link shows the overall award period of performance and each project period of performance dates. This page also shows the KK dates which drives the accounting end date used for validating transactions in PS Finance.
FA Split%	The F&A Split % link shows how the IDC distribution that will be returned is split amongst the listed investigators by projects.
View Proposal	The View Proposal link will take the user back to the Proposal record.
View Contract	The View Contract link will take the user to the Contract record where billing and invoicing demographics are set-up by the OCG post award RA.

Award Profile View

Information on Tabs and Links

OCG – PostAward

Sponsor	The Sponsor link shows UH's primary awarding sponsor and any contact information.
Attributes	The Attributes link allows a specific research attribute to be added based on type, such as Cancer, Energy and is also used to identify Non Standard IP and Sponsor Owned Equipment.
Department Credit	The Department Credit link shows credit distribution for each project under the award.
Notepad	The Notepad link shows the Date and Time stamp for the award set-up by the OCG post award RA. Additional notes can be added by the OCG post award RA for tracking purposes.
Award Modification	The Award Modification link shows the Reference Award Number (sponsor's award number), the Issue Date of the sponsor award notice, the associated period of performance covered by the award and the amount associated. The OCG post award RA utilizes this page to Generate the UH internal notice of award and to send it to the PI and department administrator.
View Documents	The View Documents button on the Award profile page is utilized by the OCG post award RA to upload the sponsor's notice of award and other documents.

Find a Project Cost center

Navigation: Grants > Awards > Award Profile > Project

UHS Finance
FS91TST Last Refreshed on: Thu, Jan 12, 2017

General Information | Project Department | Project Costing Definition | Manager | Location | Phases | Approval | Rates | Attachments | Budget Alerts

Project: C104212 [Add to My Projects](#)

*Description: Charter School: Foundation Fun Program Processing Status: Active
*Integration: 00730 University of Houston Project Status: Open
Project Type: CHART Charter Sch - No Bill Rate Set Contract Number: 104212
Percent Complete: 0.00 As Of: Project Health: As Of: [View Cost Center](#)

Project Schedule

*Start Date: 09/01/2011 *End Date: 11/30/2017 Additional Dates

Description Find | View All First 1 of 1 Last

Date/Time Stamp: 01/18/17 10:16:09AM User ID: 0195772

Description: Charter School: Foundation Fund Program Fund TEA

Long Description: Charter School: Foundation Fund Program Fund TEA

[Save as Template](#) [Copy Project](#)

Find a Project Cost center

Navigation: Grants > Awards > Award Profile > Project

UHS Finance
FS91TST Last Refreshed on: Th

Cost Center Definition

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: begins with

Fund Code: begins with

Department: begins with

Program Code: begins with

Project: begins with

Include History

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

Search Results

View All 1-2 of 2

Business Unit	Fund Code	Department	Program Code	Project
00730	5016	H0441	C0001	C104212
00730	5017	H0441	C0001	C104212

[Find an Existing Value](#) | [Add a New Value](#)

UHS Finance
FS91TST Last Refreshed on: Thu, Jan 12, 2017

[Cost Center](#) [Update Cost Center](#) [Documents](#)

Unit: 00730 Fund Code: 5017 Department: H0441 Program: C0001 Project: C104212

[Find](#) | [View All](#) 1 of 1

*Effective: 08/02/2016 *Status: **Active**

Date:

Fund: 5017 RSTR G&C-ST P/T FM TX ST AGENCY

Department: H0441 CHARTER SCHOOL

Program: C0001 PUBLIC SVC-GRANT

Project/Grant: C104212 Charter School: Foundation Fun

SpeedType: 49780 5017-H0441-C0001-C104212

PCA:

Cost Center: Paquin, Patricia

Manager:

Comments:

User ID: 0085587 Dt Modify: 06/02/2016

Internal Notice of Award

Changes

The Internal Notice of Award will change. The notice will be sent to the Principal Investigators, Department Business Administrator and other individuals in the department responsible for the grant management.

Award ID: 104212
Award PI: Black,Carolyn

Generate Date Time: MAR/07/2017 13:13:09
Page | 1

UNIVERSITY of HOUSTON

Notice of Award

Award Specifications

Award Title:	Charter School: Foundation Fund Program Fund TEA		
Sponsor:	Texas Education Agency		
Pass Thru. Sponsor:	State of Texas		
UH Award Number:	104212	Proposal:	104212
Award Type:	Grant	Pre-award Spending Date:	
Purpose:	Public Service (Cxxxx)	Start Date:	09/01/2011
Contract Type	No Bill	End Date:	11/30/2017
Award PI:	Black,Carolyn	Closeout Date:	12/30/2017
Department Admin.	Paquin,Patricia	Sponsor Award Number:	104212
OCG Representative:		Pass thru. Award Number:	
Award Department:	CHARTER SCHOOL	Status:	Accepted
NOA Issue Date:	Mar/07/2017 13:13:09		

Internal Notice of Award

Changes to Budget

Account	Description	Previous Budget Account
B5080	L5 – ANIMALS	B5025 Maintenance & Operations
B5081	L5 - HUMAN SUBJECT	B5025 Maintenance & Operations
B5082	L5 - FOREIGN TRAVEL	B5071 Travel Expense
B5083	L5 - PASS THROUGH >25K	B5024 Pass Thru
B5084	L5 - TRAVEL-DOMESTIC	B5071 Travel Expense
B5085	L5 - TRAVEL RECRUITING	B5071 Travel Expense
B5086	L5 - ALTER & RENOVATION < 5K	B5025 Maintenance & Operations
B5087	L5 - ALTER & RENOVATION >5K	B5019 Capital Outlay
B5088	L5 - RENTAL/LEASE - EQUIPMENT	B5019 Capital Outlay
B5089	L5 - RENTAL/LEASE - FACILITIES	B5025 Maintenance & Operations
B5090	L5-STIPEND PAYMENTS	B5025 Maintenance & Operations

Send questions to psgrants@share.uh.edu