Huron Grants Proposal & Award Management Workflow

Key:

Color	Legend
Blue	Huron Grants
White	Huron Agreements
Purple	PeopleSoft Grants
Yellow	CobbleStone
Gray	Sponsor

Sponsor

- 6. Sponsor receives proposal
- 7. JIT Request
- 8. Sponsor sends Award Decision to UCF

Research Community (PI, Dept Admin, etc.)

- 1. Create Proposal — **DRAFT**
- 9. Award Decision received by PI/Department
- 9a. See "Pre/Post Award Handoff" tab for details
- **DEPARTMENT EDIT** — Award SmartForm Pages 5, 6, 8 (Question 2 and 4 only), 10
- 15. Complete DEPT portion of Award
- 16. Send to Specialist

Department Review (DEPT)

- 2. Department Review — **DEPARTMENT REVIEW**
- Or

Pre-Award Office: Central Proposal Office

- 3. Specialist Review — **SPECIALIST REVIEW**
- 4. Final SPO Review — **FINAL SPO REVIEW**
- 5. Submit to Sponsor — **PENDING SPONSOR REVIEW**
- 7a. Manage JIT Process — **JIT RESPONSE REQUIRED**
- 9. Award Decision received by Pre-Award Office
- 9a. See "Pre/Post Award Handoff" tab for details

Post-Award Office: Award Management Office (AMO)

- Or
- 9. Award Decision received by AMO
- 10. Are negotiations required for Award? — No / Yes
- 11. Create CobbleStone Record of Award
- 12. Award created from proposal — **DRAFT**
- 13. Complete AMO portion of Award — Award SmartForm Pages 1 - 4, 7, 8 (Questions 1 and 3 only), 9, 11
- 14. Send to Department for Edits
- 10a. Notify Contract Manager
- 17. Assign Award Approver — Assigned Specialist / **DRAFT**
- 18. Submit for Designated Review (optional)
- 19. Award Approver Review — **FINAL REVIEW** Award Approver
- 20. Activate (Huron Award) — **ACTIVE** Award Approver
- 21. Complete remaining PS Award Setup — Grants Accounting Team
- 22. Close PS Award when complete
- 23. Update HRS Award as Complete — **COMPLETED** Assigned Specialist
- End

Contracts Office

- 10b. Contract Manager creates/submits agreement & links to Proposal
- 10c. Negotiate Contract & complete Agreements Workflow
- 10d. From proposal, Use the Send Email activity to notify AMO the award is ready to be created

#9a from Proposal and Award Workflow diagram:

The following explains the handoff between the Central Proposal Office (Pre-Award Office), Award Management Office (Post-Award Office), and Contracts Office:

1. Once a proposal is submitted to the sponsor, the proposal is in the "Pending Sponsor Review" state.

2. When a proposal **is** awarded, it will be routed as follows:

   a. <u>If the PI/Department receives the award, process as follows:</u>

      i. For grants and cooperative agreements
         - Federal
            - Send Outlook email to osp@ucf.edu and attach the document for the Award Manager
            - Use the "Add Comment" activity on the proposal to note the document was emailed to osp@ucf.edu
         - Non-Federal (including federal flow through awards)
            - "Create Agreement" in Huron Agreements and attach the document for the Contract Manager

      ii. For contracts
         "Create Agreement" in Huron Agreements and attach the document for the Contract Manager

   Note: *For awards received by Office of Research only or by both the PI/Department and OR, OR will forward to the Award or Contract Manager for next steps.*

   b. <u>If the Central Proposal Office receives an award</u>, the Proposal Specialist will update the proposal state to "Pending Sponsor Review Award Anticipated" and will forward to the Award Specialist for next steps.

   c. <u>If the Award Mgmt Office receives the award</u>, the Award Manager will forward to the appropriate contact (whether that be in the Contracts Office or Award Mgmt Office).
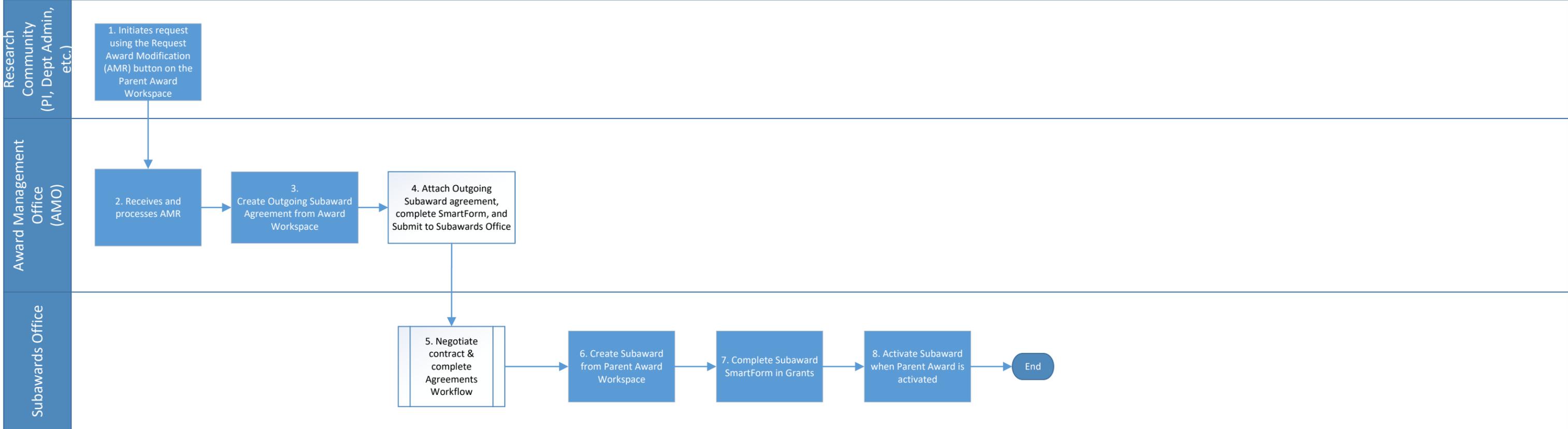
3. When a proposal is **not** awarded, it will be routed as follows:

   a. <u>If the Central Proposal Office receives the decision</u>, the Proposal Specialist will update the proposal record to the "Not Funded" state.

   b. <u>If the PI/Department receives the decision</u>, use the "Notify SPO of Grant Status" or "Send Email" activity to notify the Assigned Specialist in the Central Proposal Office. The Assigned Specialist will then update the proposal record to the "Not Funded" state.

Huron Grants Outgoing Subaward Management Workflow

Key: ■ Huron Grants   □ Huron Agreements   ■ PeopleSoft Grants

Research Community (PI, Dept Admin, etc.)

1. Initiates request using the Request Award Modification (AMR) button on the Parent Award Workspace

Award Management Office (AMO)

2. Receives and processes AMR

3. Create Outgoing Subaward Agreement from Award Workspace

4. Attach Outgoing Subaward agreement, complete SmartForm, and Submit to Subawards Office

Subawards Office

5. Negotiate contract & complete Agreements Workflow

6. Create Subaward from Parent Award Workspace

7. Complete Subaward SmartForm in Grants

8. Activate Subaward when Parent Award is activated

End

Notes:

1. Departments should use the "Award Modification Request" functionality on the parent award to notify the Award Mgmt. Office of outgoing subawards.

2. Incoming subawards are labeled as "Sponsored Research Agreements" in Huron Agreements and are managed by the Contracts Office.