

Requesting a *New Temporary Release Project*

When a project will begin work before the receipt of a formal award document, a temporary project can be requested. This project allows you to track expenses related to the project and to reduce the need for cost transfers to the project once the funds arrive. Funds released into temporary projects must be guaranteed by a Unit Fiscal Authority. This is the unit's guarantee to cover any expended funds in the event that the funding document never materializes.

A *new* temporary release can be requested in UFIRST Awards by completing the following steps:

Step 1

Locate the proposal record for which a temporary release is being requested in the Proposal Worklist. Click the proposal and open it.

Step 2

From the Proposal Workspace select the **New Award** Button



Step 3

Complete Page 1.0 General Award Information of the Award SmartForm. For Question 6.0 Sponsor Award ID enter: "Temporary"

A screenshot of a web form section labeled "6.0". It contains two fields. The first field is labeled "* Sponsor:" and has the text "US DEPT OF HOMELAND SECURITY" entered. To the right of this text are two buttons: "Select..." and "Clear". The second field is labeled "* Sponsors Award ID:" and has the text "Temporary" entered. This second field is highlighted with a yellow background.

Step 4

Complete SmartForms 1.0 General Award Information, 2.0 Personnel, and 3.0 Proposals and Agreements. DSP will complete page 4.0 Terms and Conditions.

Step 5

Complete SmartForm 5.1 Allocation Set Up. Note that the Release, Budget Release and Sponsor Authorized columns are currently No, \$0, and \$0 respectively. Select **Update** on the allocation for which temporary release funds are being requested.

5.2 Allocation Setup

1.0 Add / Edit and Remove Award Allocations:

Add

	Associated Project	Name	Start Date	End Date	Release	Budget Release	Sponsor Authorized	Remaining Sponsor Anticipated	
Update	PRJ00319	US DEPT OF HOMELAND SECURITY - 1	10/1/2016	9/30/2017	no	\$0	\$0.00		Delete
Update	PRJ00319	US DEPT OF HOMELAND SECURITY - 2	10/1/2017	9/30/2018	no	\$0	\$0.00		Delete
Update	PRJ00319	US DEPT OF HOMELAND SECURITY - 3	10/1/2018	9/30/2019	no	\$0	\$0.00		Delete

Step 6

In the Edit Funding Allocation Pop-Up Box select **Yes** for Question 1.0. An additional question will appear. **Answering Yes to this second question will designate this as a Temporary Release Request.** This will then route to the responsible Unit Fiscal Authority for approval upon submission of the SmartForm.

Edit Funding Allocation

Create or Edit Funding Allocation

1.0

*** Release Budget for this Allocation?**
 Yes No [Clear](#)

Are you requesting authority to spend this released allocation prior to receipt of an official award or fully executed agreement?
 Yes No [Clear](#)

Step 7

In the Edit Funding Allocation Pop-Up Box, \$0.00 should be entered field 2.0. This is because UF has not received a formal award; therefore the sponsor has not authorized any amount for release. In field 3.0 enter the amount that is anticipated to be received for this allocation. This is not the amount being requested for temporary release, but the entire anticipated allocation amount. The temporary release amount will be established on the following page **5.3 Budget Reconciliation**

2.0 For this allocation, enter the **sponsor authorized amount:**

3.0 For this allocation, enter the **remaining anticipated amount:**

Step 8

Complete the remainder of the Edit Finding Allocation Pop-Up Box and click **OK**.

***If you are requesting temporary releases for multiple myUFL projects, Steps 6-8 should be completed for each project.

Step 9

On **Page 5.3 Budget Reconciliation** adjust each budget category to reflect the amount being requested for temporary release. Once complete, click **Continue**.

***A temporary release is **not** bound to any specific amount or percentage, however the Unit approving the temporary release is liable for the funds in the event the sponsor does not issue an award.

Step 10

On Page 5.4 Award Financial Summary, review the categories presented. If the second row does not show "Total Current Sponsor Authorized Amount to Date: \$0.00," Step 6 of this Instructional Guide was missed and will need to be revisited.

5.4 Award Financial Summary

1.0	Total Budget Release Amount:	\$ 65,660.00
	Total Current Sponsor Authorized Amount to Date:	\$ 0.00
	Total Remaining Sponsor Anticipated Amount:	\$ 75,000.00
	Total Sponsor Authorized and Anticipated Award Amount:	\$ 75,000.00

Step 11

Complete the remaining Award SmartForm pages. Once in the Award Workspace execute the Submit for Review activity to route the request for Temporary Release to your Unit Fiscal Authority to approve.



If approved the Temporary Request will continue on to DSP and C&G for release.