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”

**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.
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.

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.

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](image)

**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.

[Submit for Review]

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