Making a Temporary Project Permanent
When a funding document is received for a project that was released as a Temporary Award, an Award Modification must be completed to transition the temporary Award to permanent status.

Step 1
Locate the Award record in which the Temporary Award was released.

Step 2
From the Award Workspace execute the Create Award Modification activity

Step 3
Complete Page 1.0 General Award Information of the Award SmartForm. For Question 6.0 Sponsor Award ID enter: "Temporary (Today’s Date)"

Step 4
Locate the Modification under the Modifications Tab in the Award Workspace. Use the SmartForms drop down to select Award Modification
Step 5
On the Award Modification SmartForm select all of the modification types that may apply to your specific Temporary-to-Permanent Award, however the Financial, Dates, Terms and Conditions, Award Demographics mods will most likely require selection on every Temporary-to-Permanent award.

Step 6
Upon selection of Financial and Dates Modification Types additional drop down selections will populate. Select all of the Financial Modification types that relate to your specific award, however Change in budget-release or obligated amount will most likely be required.

Step 7
Select all Date Modification Types that pertain to your specific award, however, Revised Award or Project Stated and End Date will be the most likely selection.
Step 8
Select Yes in the final section of Field 1.0 to indicate that this Award is being transitioned from Temporary to Permanent status.

Step 8
Complete the remainder of the Award Modification Page 1.0 and Page 2.0 Proposals and Agreements.

Step 9
On Page 3.1 Change in Overall Award Budget select Increase and a dropdown menu will appear below. Select Increase – Temporary-Made-Permanent. Then click Continue.

Step 10
On Page 4.0 enter the formal Award start and end dates as they appear in the funding document. Then click Continue.

Step 11
On Page 6.0 Award Demographics use the fields to ensure that the Award demographics match the formal funding documents, specifically the Sponsor Award ID.

Step 12
On Page 7.1 Modified Terms and Conditions, work with DSP to ensure that all applicable terms and conditions are selected for your Award. Then click Continue.

Step 13
On Page 8.1 Allocation Set Up, use this page to establish any new allocations that may be needed for your award and/or to update the authorized budget amounts and dates of your existing allocations.
Step 14
In the Edit Funding Allocation pop-up window, update the applicable fields. Most likely fields 2.0-5.0 will require updates. For example, if we have received a funding document which funds all of year 1, then the budget updates will look similar to the below example:

When complete, click OK.

Step 15
On Page 8.2 Advance Spending Authority by Allocation, select all allocations that need to transition from Temporary to Permanent status. Note, there may be many allocations on this page. Be sure to select only those that are currently in temporary status.

Step 16
On Page 8.3 Project Set Up, establish any new myUFL Projects that may be required for your Award. You will only be able to Edit the Existing Projects if you selected Project Demographics on the first page of the Award Modification SmartForm. Once complete, click Continue.

Step 17
On Page 8.6 use the Budget Reconciliations page to add the remainder of this allocation’s funds to the current project budget in myUFL. For example, if the temporary allocation(s) released only $50,000 of a $200,000 award, use the adjustment column to add the additional $150,000 to be released. Once complete, click Continue.
Step 18
Review data on all subsequent pages for accuracy, then on Page 12.0 Complete Modification, add the date sponsor award date in Field 1.0 Effective Date of Award Modification. Then click Finish.

12.0 Completed Award Modification

1.0 Effective Date of Award Modification:

Step 19
From the Award Workspace execute the Submit for Review activity to route the modification for review and approval.

Submit for Review