

## 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)"

**Create Award Modification**

**New Award Modification**

**Award ID:** AWD00039  
**Award Name:** Temp Testing

A new award modification will be created for the above award:  
Temp Testing - Modification #1

Clicking "OK" will begin the process of creating an award modification. This process will take several minutes. Once created, you can access the new modification on the "Modification" tab of the award workspace.

### Step 4

Locate the Modification under the Modifications Tab in the Award Workspace. Use the SmartForms drop down to select Award Modification

Create Award Modification											
New Award Modification											
Modifications											
Name	ID	SmartForm	Mod Type	Mod Type Detail	Internal/Sponsor-Driven	Net Dollar Change	Sponsor #	Effective Date	Date Modified	Status	
Temp Testing - Modification #1	AWD00039_MOD0001	SmartForm	1.0 Award Modification	12.0 Completed Award Modification		AWD00039_MOD0001	23	AWD00039_MOD0001	5/9/2016 1:35 PM	Draft	

**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.

**1.0**

**\* Select Modification Type:**

- Financial
- Dates
- Personnel (Including effort commitments)
- Terms and Conditions
- Compliance (IRB, IACUC)
- Early Award Termination
- Project Demographics (Name, IDC Center, Project Type)
- Award Demographics (Sponsor, CFDA, FAIN, Responsible Unit)

**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.

**\* Select Financial Modification Type:**

- Change in budget-release or obligated amount
- Change in voluntary committed or mandatory cost share
- Carryover
- Re-budgeting categories within an existing project
- Moving budget between existing projects (Net \$0 change)
- Create new project
- Industry Clinical Trial or Miscellaneous Donor or IFAS FSP
- Core office correction
- Post-Conversion update

**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.

**\* Select Date Modification Type:**

- No Cost Extension
- Spending Start Dates (KK Begin Date)
- Revised Award or Project Start and End Date

**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.

**\* Are you indicating that sponsor authorization has been received for any current temporary projects (temporary-made-permanent)?**

Yes  No [Clear](#)

**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.

**3.0**

**Current Sponsor Award ID:** 23

**Change 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.

**2.0**

**Edit Existing Allocations:**

Associated Project	Name	Start Date	End Date	Release	Budget Release	Sponsor Authorized	Remaining Sponsor Anticipated
<a href="#">Update</a> P0000081	Adrienne Training Proposal 5-9-2016 - 1	7/1/2016	6/30/2017	yes	\$11,400.00	\$0.00	\$27,278.00

**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:

**2.0**

**Current Sponsor Authorized Amount for this allocation:** \$0.00

**Change Sponsor Authorized Amount for this allocation to:**

\$27,278.00

**3.0**

**Current Remaining Sponsor Anticipated Amount for this allocation:**

\$27,278.00

**Change Remaining Sponsor Anticipated Amount for this allocation to:**

0

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.

**8.2 Advance Spending Authority by Allocation**

**Award ID:** AWD00039  
**Award Name:** Temp Testing

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**1.0** Select the temporary allocations that are to be made permanent:

Adrienne Training Proposal 5-9-2016 - 1

**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.

Approved Budget		Baseline	Rollup Adjustments	Adjustment (+/-)	Active Allocation Total
-Person	PERSON	\$2,000.00	\$0.00	* \$0.00	\$2,000.00
-OPS	OTPERS	\$0.00	\$0.00	* \$0.00	\$0.00
-Post Doc	PSTDOC	\$0.00	\$0.00	* \$0.00	\$0.00
-Graduate Student	GRADST	\$0.00	\$0.00	* \$0.00	\$0.00
-Undergraduate Student	UNGRAD	\$0.00	\$0.00	* \$0.00	\$0.00
Fringe Benefits	FRINGE	\$600.00	\$0.00	* \$0.00	\$600.00

**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.

