

## Modification to Create a New Project – Non-Temporary

New projects may be required for a variety of reasons; to break out funds for an internal collaborator, to sequester participant support funds, or to ensure funds between budget years are not comingled when the sponsor requires this.

To create a new project under an established award follow the steps below:

### Step 1

From the Award Workspace execute the Create Award Modification activity.



### Step 2

In the Modification SmartForm make the selections indicated below: "Financial", "Create a New Project", and "No". Complete fields 3.0-6.0, using as much detail as you can in Field 6.0. (The information entered in Field 6.0 will be present on the resulting NOA generated from UFIRST.) Then click .

2.0

**\* Select Modification Type:**

☒ Financial

☐ Dates

☐ Personnel (Including effort commitments)

☐ Terms and Conditions (including spending/KK dates)

☐ Compliance (IRB, IACUC)

☐ Early Award Termination

☐ Project Demographics (Name, IDC Center, Project Type)

☐ Award Demographics (Sponsor, CFDA, FAIN, Responsible Unit)

☐ Core Office Correction

**\* 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

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

☐ Yes ☒ No [Clear](#)

### Step 3

On Page 8.1 Allocation Set up create two new allocations. One will be a negative allocation to withdraw funds from the existing project, and one will be a positive allocation which will deposit funds into the new project. (Note: If the new project is being established with new funds it is possible that only one new allocation will be necessary.)

#### Step 3.1

For the first allocation, click **Add** in Field 1.0 Add New Allocations. In Field 1.0 In the **Add Funding Allocation** pop-up window select "Yes" to release budget and "No" to "Is this a temp?" Then enter the amount of direct and indirect dollars to be withdrawn from the existing project. If the existing project has no IDC you can leave the Indirect field blank. Complete the remainder of the **Add Funding Allocation** pop-up window and click **OK**.

**8.1 Allocation Setup**

Award ID: AWD00605  
Award Name: Improved Reproduction in Foodfish

**1.0 Add New Award Allocations:**

**Add**

Associated Project: There are no associated projects.

**2.0 Edit Existing Allocations:**

Associated Project: P0016671  
Update

**Add Funding Allocation - Google Chrome**

https://qat-grants.research.ufl.edu/QATstore/CommonAdministration/Choosers/Entity/CustomDataType/DataEntry/Form/postback=1&form=USqualifiedAttributeFu

**1.0 Release Budget for this Allocation?**

☒ Yes ☐ No

Are you requesting authority to spend this released allocation prior to receipt of an official award or fully executed agreement (is this a temp?)

☐ Yes ☒ No

**2.0 Sponsor Authorized Amount:**

Direct: -5000  
Indirect:   
Total: \$-5,000.00

Select "Yes" if the budget for this allocation has been approved for release by the sponsor or you are asking for temp release approval from your Unit Financial Authority (UFA).  
Select "Yes" if you requesting a Temporary/At-Risk/Advanced Release of funds.  
How much of the award that will be posted to this allocation (period) has the sponsor officially authorized? For Temporary/At-Risk/Advanced Releases enter 0.

#### Step 3.2

For the second allocation, click **Add** in Field 1.0 Add New Allocations. In Field 1.0 In the **Add Funding Allocation** pop-up window select "Yes" to release budget and "No" to "Is this a temp?" Then enter the amount of direct and indirect dollars to be deposited to the new project. If the existing project has no IDC you can leave the Indirect field blank. Complete the remainder of the **Add Funding Allocation** pop-up window and click **OK**. Then click Continue.

**8.1 Allocation Setup**

Award ID: AWD00605  
Award Name: Improved Reproduction in Foodfish

**1.0 Add New Award Allocations:**

**Add**

Associated Project: Withdraw from existing 11-22-2016

**2.0 Edit Existing Allocations:**

Associated Project: P0016671 US DEPT OF AG FOOD & AG - 1  
Update

**Add Funding Allocation - Google Chrome**

https://qat-grants.research.ufl.edu/QATstore/CommonAdministration/Choosers/Entity/CustomDataType/DataEntry/Form/postback=1&form=USqualifiedAttributeFu

**1.0 Release Budget for this Allocation?**

☒ Yes ☐ No

Are you requesting authority to spend this released allocation prior to receipt of an official award or fully executed agreement (is this a temp?)

☐ Yes ☒ No

**2.0 Sponsor Authorized Amount:**

Direct: 5000  
Indirect:   
Total: \$5,000.00

Select "Yes" if the budget for this allocation has been approved for release by the sponsor or you are asking for temp release approval from your Unit Financial Authority (UFA).  
Select "Yes" if you requesting a Temporary/At-Risk/Advanced Release of funds.  
How much of the award that will be posted to this allocation (period) has the sponsor officially authorized? For Temporary/At-Risk/Advanced Releases enter 0.

**Step 4**

On **Page 8.3 Project Set Up, Field 1.0 Add New Project** click Add.

**Step 4.1**

In the Add Peoplesoft Project pop-up window enter a project name in **Field 1.0**. This project name will become the project name in myUFL and myInvestigator, therefore be sure to make this something relevant to both administrators and investigators. In **Field 2.0 Select Associated Allocation**, select the allocation that was established to deposit funds into the new project. Complete Fields 3.0-12.0. Be sure to identify a Project Unit Administrative Contact in Field 4.0 as this field determines who will receive all myUFL generated notifications related to nearing end dates for the award and any related protocols.

**8.3 Project Setup**

Award ID: AWD00605  
Award Name: Improved Reproduction in Foodfish

**1.0 Add New Project:**  
Add  
Project ID: There are no it

**2.0 Edit Existing Project:**  
Project ID: P001687  
Update

**Add PeopleSoft Project**

Create or Edit Projects

**1.0 Project Name:**  
Co-PI: Improved Reproduction of Foodfish

**2.0 Select Associated Allocation(s):**

Name	Start Date	End Date	Released	Sponsor Authorized
<input type="checkbox"/> Withdraw from existing 11-22-2016	6/1/2016	5/31/2017	Yes	\$0.00
<input checked="" type="checkbox"/> Deposit to new project 11-22-2016	6/1/2016	5/31/2017	Yes	\$0.00
<input type="checkbox"/> US DEPT OF AG NATL INST OF FOOD & AG - 1	6/1/2016	5/31/2017	Yes	\$29,250.00

*This will be the title in myUFL, myinvestigator, UFIRST project searches, and other UF reporting tools. If more than one project under the award, name the project something unique (i.e. Ocular Project - YEAR 1 or Alaskan Otters- Jones Subproject).*

*Select which budget allocations are to be grouped for posting under this project.*

**Step 4.2**

In Field 2.0 Edit Existing Project click Update. In the Edit Peoplesoft Project pop-up window select the allocation that was established to withdraw funds from the existing project. Once complete, click **OK**. The click **Continue**.

**2.0 Edit Existing Project:**  
Project ID: P001687  
Update

**Edit PeopleSoft Project**

**1.0 Project Name:**  
US DEPT OF AG NATL INST OF FOOD & AG

**2.0 Select Associated Allocation(s):**

Name	Start Date	End Date	Released	Sponsor Authorized
<input checked="" type="checkbox"/> Withdraw from existing 11-22-2016	6/1/2016	5/31/2017	Yes	\$0.00
<input type="checkbox"/> Deposit to new project 11-22-2016	6/1/2016	5/31/2017	Yes	\$0.00
<input type="checkbox"/> US DEPT OF AG NATL INST OF FOOD & AG - 1	6/1/2016	5/31/2017	Yes	\$29,250.00

## Step 5

On page 8.6 select the first project to be reconciled. (In this example the existing project has been selected first.) Then select the appropriate allocation.

### 8.6 Award / Authorized Budget Reconciliation

		<b>Total</b>				<b>Total</b>	
Direct	\$0.00			Sponsor Authorized Amount:	\$0.00		
Indirect	\$0.00			Active Allocation Total:	\$0.00		
Total	\$0.00			Difference	\$0.00		

  

Select the Project:	Project Name:	Project Start:	Project End:	Project Manager:	Dept ID:	IDC Rate:	IDC Base:	IDC Type:
P0016871	US DEPT OF AG NATL INST	6/1/2016	5/31/2017	Cortney Ohs	60760000	0%	NONE	On-Campus AREC Research

  

Select the Funding Allocation to display:	Allocation Start:	Allocation End:
None Selected		
None Selected		
US DEPT OF AG NATL INST OF FOOD & AG - 1		
Withdraw from existing 11-22-2016		

## Step 5.1

When reconciling the withdrawn funds, the funds must be withdrawn from existing categories. For example is a project does not have foreign travel funds currently, funds cannot be withdrawn from the foreign travel category.

Use the Adjustment column to identify which amounts are to be withdrawn from which categories. Once the Allocation shows a Difference of \$0 the allocation has been balanced.

### 8.6 Award / Authorized Budget Reconciliation

		<b>Total</b>				<b>Total</b>	
Direct	-\$5,000.00			Sponsor Authorized Amount:	-\$5,000.00		
Indirect	\$0.00			Active Allocation Total:	-\$5,000.00		
Total	-\$5,000.00			Difference	\$0.00		

  

Select the Project:	Project Name:	Project Start:	Project End:	Project Manager:	Dept ID:	IDC Rate:	IDC Base:	IDC Type:
P0016871	US DEPT OF AG NATL INST	6/1/2016	5/31/2017	Cortney Ohs	60760000	0%	NONE	On-Campus AREC Research

  

Select the Funding Allocation to display:	Allocation Start:	Allocation End:
Withdraw from existing 11-22-2016	6/1/2016	5/31/2017

  

Approved Budget	Baseline		Rollup Adjustments	Adjustment (+/-)	Active Allocation Total
	Import (\$)	Clear			
-Person	\$0.00		\$0.00	\$0.00	\$0.00
-OPS	\$0.00		\$0.00	\$0.00	\$0.00
-Post Doc	\$0.00		\$0.00	\$0.00	\$0.00
-Graduate Student	\$0.00		\$0.00	\$0.00	\$0.00
-Undergraduate Student	\$0.00		\$0.00	\$0.00	\$0.00
Fringe Benefits	\$0.00		\$0.00	\$0.00	\$0.00
Equipment	\$0.00		\$0.00	\$0.00	\$0.00
Domestic Travel	\$0.00		\$0.00	\$0.00	\$0.00
Foreign Travel	\$0.00		\$0.00	\$0.00	\$0.00
Participant Support	\$0.00		\$0.00	\$0.00	\$0.00
Materials and Supplies	\$0.00		\$0.00	-\$5,000.00	-\$5,000.00

Click Save in the UFIRST Navigation Bar above.

<b>Save</b>	Exit	Hide/Show Errors	Print...	Jump To:	8.6 Award / Authorized Budget Reconciliation
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### Step 5.2

Select the next project to be reconciled. (In this example this will be the new project.) Then select the appropriate allocation.

#### 8.6 Award / Authorized Budget Reconciliation

		<b>Total</b>				<b>Total</b>	
Direct		\$0.00		Sponsor Authorized Amount:		-\$5,000.00	
Indirect		\$0.00		Active Allocation Total:		\$0.00	
Total		\$0.00		Difference		-\$5,000.00	

  

Select the Project:	Project Name:	Project Start:	Project End:	Project Manager:	Dept ID:	IDC Rate:	IDC Base:	IDC Type:
P0020590	Co-PI: Improved Reproduc	6/1/2016	5/31/2017	Adrienne Aviles	60230000	0%	NONE	On-Campus Research

  

Select the Funding Allocation to display:	Allocation Start:	Allocation End:
None Selected		
None Selected		
Deposit to new project 11-22-2016		

Use the Adjustment column to identify which amounts are to be deposited from which categories. Once the Allocation shows a Difference of \$0 the allocation has been balanced.

#### 8.6 Award / Authorized Budget Reconciliation

		<b>Total</b>				<b>Total</b>	
Direct		\$5,000.00		Sponsor Authorized Amount:		\$5,000.00	
Indirect		\$0.00		Active Allocation Total:		\$5,000.00	
Total		\$5,000.00		Difference		\$0.00	

  

Select the Project:	Project Name:	Project Start:	Project End:	Project Manager:	Dept ID:	IDC Rate:	IDC Base:	IDC Type:
P0020590	Co-PI: Improved Reproduc	6/1/2016	5/31/2017	Adrienne Aviles	60230000	0%	NONE	On-Campus Research

  

Select the Funding Allocation to display:	Allocation Start:	Allocation End:
Deposit to new project 11-22-2016	6/1/2016	5/31/2017

  

Approved Budget	Baseline		Rollup Adjustments	Adjustment (+/-)	Active Allocation Total
	Import (\$)	Clear			
-Person	\$0.00		\$0.00	\$0.00	\$0.00
-OPS	\$0.00		\$0.00	\$0.00	\$0.00
-Post Doc	\$0.00		\$0.00	\$0.00	\$0.00
-Graduate Student	\$0.00		\$0.00	\$0.00	\$0.00
-Undergraduate Student	\$0.00		\$0.00	\$0.00	\$0.00
Fringe Benefits	\$0.00		\$0.00	\$0.00	\$0.00
Equipment	\$0.00		\$0.00	\$0.00	\$0.00
Domestic Travel	\$0.00		\$0.00	\$0.00	\$0.00
Foreign Travel	\$0.00		\$0.00	\$0.00	\$0.00
Participant Support	\$0.00		\$0.00	\$0.00	\$0.00
Materials and Supplies	\$0.00		\$0.00	\$5,000.00	\$5,000.00

Click Save in the UFIRST Navigation Bar above.

Save	Exit	Hide/Show Errors	Print...	Jump To:	8.6 Award / Authorized Budget Reconciliation
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Then click Continue.

### Step 6

On Page 8.7 Award Financial Summary the budget amounts should not be increased from the existing Award Amount, nor should they be different.

#### 8.7 Award Financial Summary

1.0	Total Budget Release Amount:	\$29,250.00
	Total Current Sponsor Authorized Amount to Date:	\$29,250.00
	Sum of All Project Cost Share Amount:	\$0.00
	Total Award Cost Share Requirement:	\$0.00

### Step 7

Review the remaining pages, inclusive of effort commitments, and update as necessary. On Page 12.0 enter an Effective Date.

#### 12.0 Completed Award Modification

1.0	* Effective Date of Award Modification:
	11/22/2016

Then click **Finish**.

### Step 8

From the Modification Workspace click **Submit for Review** to send to DSP.

