



Adjust Project Funding

Use these instructions to modify or transfer funding for a project. Perform this task when you modify an award or project budget or when you need to transfer funds within a budget.

Prerequisites

- You will need the award number that funds the project.

To Adjust Project Funding:

- Select **Award** to go to the **Find Award** form.
- Enter the **Award Number**, click **Find**, click **Open** to open the **Award Management** window.

The screenshot shows the 'Award Management' window with the following details:

- Operating Unit: The Research Foundatic
- Number: 83685
- Short Name: Implanted SiC JBS Diode
- Full Name: High Temperature Implanted SiC JB
- Start Date: 01-FEB-2019
- Close Date: 30-APR-2020
- Purpose: Grant
- Organization: 011 College of Nanoscal
- Award Amount: 30,000.00
- Funding Source Name: Nissin Ion Equipment Co
- Funding Source Award Number: NA
- Pre-Award Date:
- End Date: 31-JAN-2020
- Award Type: Foreign
- Status: Active
- Funded Amount: 30,000.00

Buttons: Cost Sharing Matching Information, Funding Summary, Reports, Project Funding

Number	Issue Date	Type	Description	Active	Billable	I	J
1	01-FEB-2019	Award	Funded	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Change the project funding by creating a new installment or modifying an existing one on the **Installments** tab at the bottom of the form.
4. Click on the next available blank line to create a new installment.
5. Click in the **Number** field. Each installment should have a unique number. All awards must have at least one installment.
6. In the **Issue Date** field, enter the date the installment was issued.
7. In the **Type** field, enter the type (Amendment, Award, Supplement).
8. In the Description field, enter the purpose of the installment.
9. Use the horizontal scroll bar to view the next fields.

Number	Issue Date	Type	Start Date	End Date	Close	Active	Billable	I	J
1	01-FEB-2019	Award	01-FEB-2019	31-JAN-2020	30-AF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	24-APR-2019	Award				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Enter the **Start Date** (the effective date of the installment, on or after which expenditures can incur).
11. Enter the **End Date** (the last effective date of an expenditure against the installment).
12. Enter the **Close Date** (the last effective date of the installment, after which all transactions and invoicing stop for the installment).
13. Use the horizontal scroll bar to view the next fields.
14. Enter the **Direct Cost** portion of the installment.
15. Enter the **Indirect Cost** portion of the installment.
16. The **Total** (direct plus indirect costs) automatically populates.
17. Click the **Active** flag which indicates whether an installment has been officially awarded by the sponsor.
18. The **Billable** flag will be automatically checked when an installment is made active.

Number	Issue Date	Type	Direct Cost	Indirect Cost	Total	Active	Billable
1	01-FEB-2019	Award	24,450.00	5,550.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	24-APR-2019	Award	0.00	0.00		<input type="checkbox"/>	<input type="checkbox"/>

Note: [] The **FlexField** is the Oracle descriptive FlexField to record custom data.

19. Select **File > Save**.

Move on to adjust the project funding.

1. Click the **Project Funding** button to go to the **Fund Projects** form.

Project Number	Task Number	Amount	Date
1151708	1	30,000.00	24-JAN-2019

Project Name: Task Name:

Number	Issue Date	Type	Indirect Cost	Total	Active	Billable	I	J	
1	01-FEB-2019	Award	50.00	5,550.00	30,000.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	24-APR-2019	Award	00.00	0.00	23,000.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

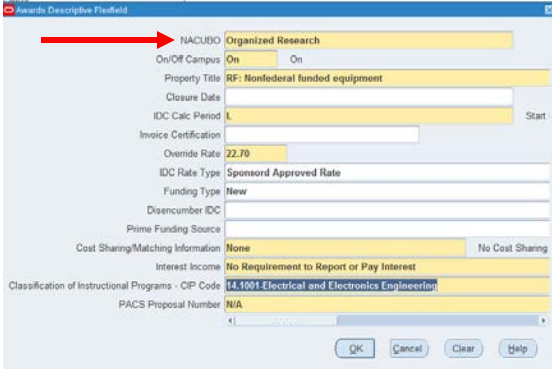
2. Complete the following fields as necessary
 - Project Number
 - Task Number
 - Amount
 - Date (The current date automatically appears in this field, but it can be changed)
3. Select **File > Save**.

Warning! When projects are funded and the project and award [NACUBO \(National Association of College and University Business Offices\) funding categories](#) are different, a warning message appears when you save the record. When there is only one project funded by an award, the NACUBO category should be the same. If multiple projects are funded by an award, the NACUBO category **can** be different.

If the categories are different, click **Yes** to save your changes.

If the categories should be the same, click **No** and change the NACUBO category for the award or project, as follows:

- To change the award NACUBO, refer to Change Award Information.
 - To change the project NACUBO, if expenditures have been made on the project, a new project will need to be created with the correct NACUBO category. Refer to Create a Project. If expenditures have not yet been made on the project, refer to the Modify Project or Task Information.
4. Close the **Fund Projects** form to return to the **Award Management** form.



The screenshot shows the 'Awards Descriptive Fieldset' form. A red arrow points to the 'NACUBO' field, which is set to 'Organized Research'. Other fields include 'On/Off Campus' (On), 'Property Title' (RF: Nonfederal funded equipment), 'Closure Date', 'IDC Calc Period' (L), 'Invoice Certification', 'Override Rate' (22.70), 'IDC Rate Type' (Sponsor Approved Rate), 'Funding Type' (New), 'Disencumber IDC', 'Prime Funding Source', 'Cost Sharing/Matching Information' (None), 'Interest Income' (No Requirement to Report or Pay Interest), 'Classification of Instructional Programs - CIP Code' (14.1001 Electrical and Electronics Engineering), and 'PACS Proposal Number' (N/A). Buttons for 'OK', 'Cancel', 'Clear', and 'Help' are at the bottom.