



## Process - Change Award Information

Use these instructions to change administrative information on an existing award.

### Important Notes:

There are several fields that you **can't** change once expenditures, revenue or invoices exist--this includes **encumbering facilities and administrative (F&A or indirect) costs--on an award, project or task.**

**Award Purpose** (This field can only be changed if you're staying within the same activity type, e.g., you can go from a contract to a grant, but you can't go from a contract to a clinical practice plan.)

#### **Award Type**

#### **Award Organization**

#### **Revenue Distribution Rule**

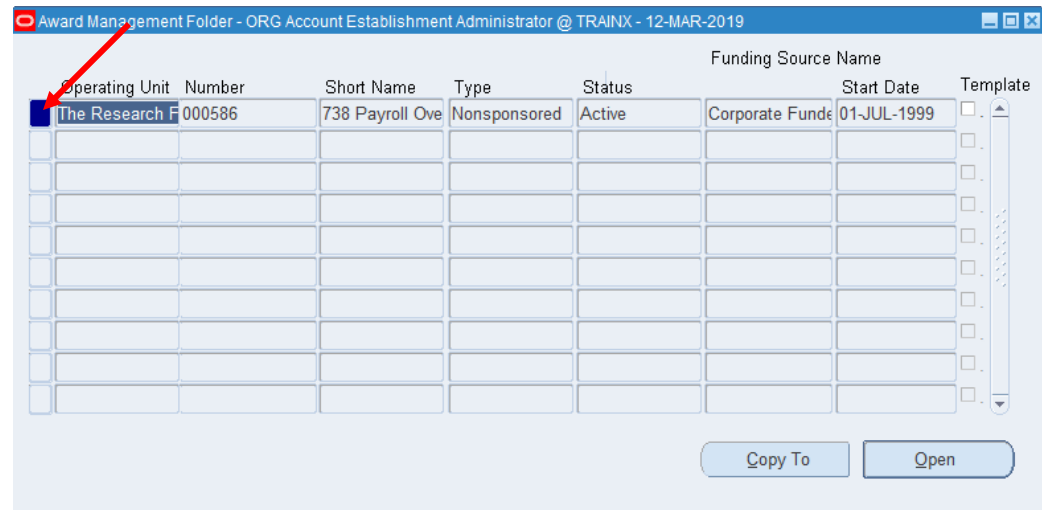
The **Funding Source Name** field (the sponsor's name) can't be changed after you save it on the **Award Management** form. If you accidentally selected the wrong sponsor name, you'll need to create a new award (refer to the Create an Award Process Help).

The sponsor's address and contact information is automatically entered by the system from information in the Customer File. If you want to change this information or the contact information you need doesn't appear in the List of Values, you will need to send a request to update the Customer File to [customerfile@rfsuny.org](mailto:customerfile@rfsuny.org). This process ensures that updated information is used throughout the system.

You may modify award dates, but you'll need to recalculate your budget (the baseline process). For more information, refer to the Modify Award and Project Budget Process Help.

## Prerequisites

- You must have one of the following responsibilities to change award information:
  - ORG Account Establishment Specialist
  - ORG Account Establishment Specialist with Budget Approval
  - ORG Account Establishment Administrator
- You will need to know the number of the award you want to change.



The screenshot shows a window titled "Award Management Folder - ORG Account Establishment Administrator @ TRAINX - 12-MAR-2019". It displays a table with the following columns: Operating Unit, Number, Short Name, Type, Status, Funding Source Name, Start Date, and Template. The first row is highlighted, and a red arrow points to the checkbox in the Template column for that row.

Operating Unit	Number	Short Name	Type	Status	Funding Source Name	Start Date	Template
The Research F	000586	738 Payroll Ove	Nonsponsored	Active	Corporate Funde	01-JUL-1999	<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"/>

Buttons: Copy To, Open

## To change award information:

1. Select **Awards** to open the **Find Award** form.
2. Enter the **award** or award template.
3. Click **Find** to go to the **Award Management Folder** form for the award.
4. Click the box next to the award that you want to modify.
5. Click **Open** to open the **Award Management** form.

Depending on the award information you need to change, you'll perform any of the following tasks from the **Award Management** form:

- Change general information
- Change credit distribution percentages
- Change Installments, Terms and Conditions, Budgetary Control, Funding Source, Contacts, Personnel or References Information
- Change compliances information, including billing format information
- Change reports information
- Add or change cost sharing/matching information

The screenshot shows the 'Award Management' window. The top section contains various fields for award details:

- Operating Unit: The Research Foundatic
- Number: 000586 (with a 'Template' checkbox)
- Funding Source Name: Corporate Funded
- Short Name: 738 Payroll Overpayer
- Funding Source Award Number: na
- Full Name: 738 Payroll Overpayment
- Pre-Award Date: (empty)
- Start Date: 01-JUL-1999
- End Date: 30-JUN-2022
- Close Date: 30-JUN-2022
- Award Type: Nonsponsored
- Purpose: Payroll Overpayment (with 'Revenue Hard Limit' checkbox)
- Status: Active
- Organization: 738 RF Operations Cam (with 'Invoice Hard Limit' checkbox)
- Funded Amount: 1.00
- Award Amount: 1.00

Below these fields are buttons for 'Cost Sharing Matching Information' and 'Funding Summary'. A tabbed interface at the bottom includes 'Installments', 'Terms and Conditions', 'Budgetary Control', 'Funding Source Details', 'Contacts', and 'Personnel'. The 'Installments' tab is active, showing a table:

Number	Issue Date	Type	Description	Active	Billable	I	J
1	01-JUL-1999	Award		<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"/>

At the bottom of the window are buttons for 'Reports' and 'Project Funding'.

**Note:** You may change any of the fields listed below.

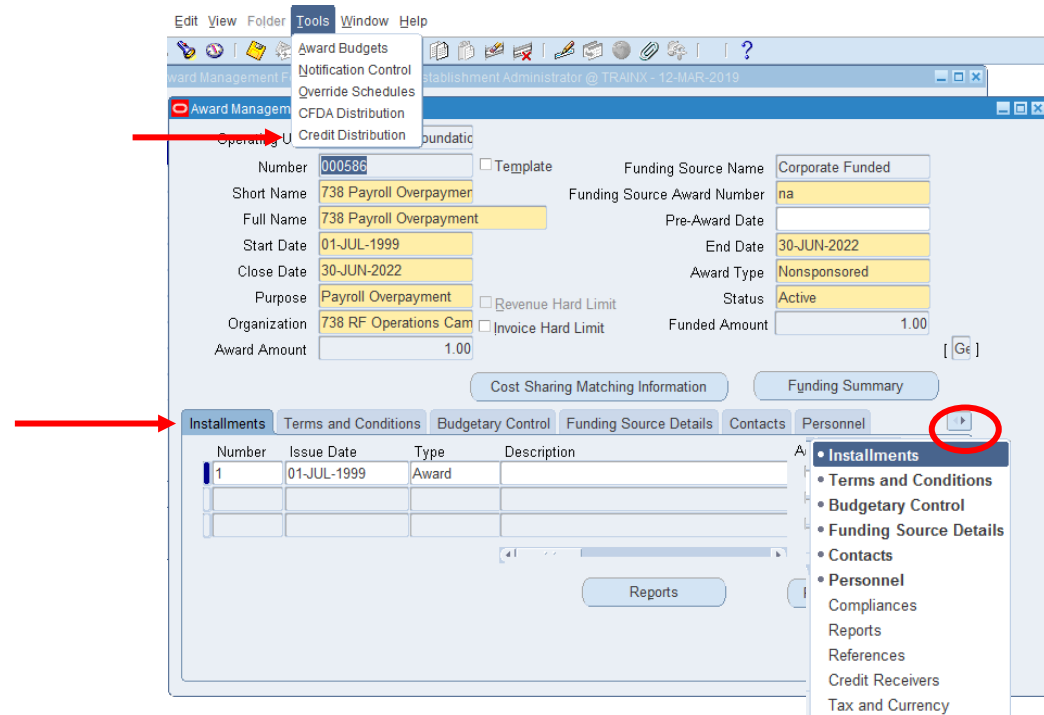
- Short Name
- Funding Source Award Number
- Full Name
- Start Date
- End Date
- Close Date
- Status

To change **Credit Distribution Percentages**:

1. Select **Tools > Credit Distribution**.
2. Refer to the Add or Change Award Credit Distribution Information Process Help for more information.
3. Click **Save** to return to the **Award Management** form.

To change Installments, Terms and Conditions, Budgetary Control, Funding Source, Contacts, Personnel or References Information, you'll work with various tabs or fields on the **Award Management** form to change the following information in your award:

- Installments: To change direct or indirect costs.
- Terms and conditions: To change specific terms and conditions.
- Budgetary control: To change spending control levels.
- Funding source: To change sponsor bill-to or ship-to addresses.
- Contacts: To change existing sponsor contact information.
- Personnel: To change personnel working on the award.
- References: To change award references or record information that isn't captured elsewhere in the system.
- Project funding: To change project or project and task funding.



**Note:** You may change only the fields listed below (fields are dependent on Award type). Select **File > Save** after you update each tab to save your changes.

- NACUBO
- On/Off Campus
- Property Title
- Closure Date
- IDC Calc Period
- Invoice Certification
- Override Rate
- CFDA Number
- Interest Income
- Cost Sharing/Matching Information
- DHHS Agency Prefix
- DHHS Document Number
- American Recovery and Reinvestment Act Funding
- American Recovery and Reinvestment Act Funding Amount
- Subject to E-Verify Rule

The top screenshot, titled "Award Management - ORG Account Establishment Administrator @ TRAINX - 12-MAR-2019", displays a form with the following fields and values:

Operating Unit	The Research Foundatio	
Number	000586	<input type="checkbox"/> Template
Short Name	738 Payroll Overpayer	Funding Source Name: Corporate Funded
Full Name	738 Payroll Overpayment	Funding Source Award Number: na
Start Date	01-JUL-1999	Pre-Award Date:
Close Date	30-JUN-2022	End Date: 30-JUN-2022
Purpose	Payroll Overpayment	Award Type: Nonsponsored
Organization	738 RF Operations C...	Status: Active
Award Amount	1.00	Funded Amount: 1.00

The bottom screenshot, titled "Awards Descriptive Flexfield", displays a form with the following fields and values:

NACUBO	General Administration	
On/Off Campus	On	On
Property Title	No Property Purchased	
Closure Date		
IDC Calc Period	N	No IDC
Invoice Certification		
Override Rate	0.00	
IDC Rate Type		
Funding Type		
Disencumber IDC		
Interest Income	No Requirement to Report or Pay Interest	

On the **Installments** tab, you may only change the following fields:

- Number
- Issue Date
- Type
- Description
- Start Date
- End Date
- Close Date
- Direct Cost
- Total
- Indirect Cost
- Active
- Billable

In the **Terms and Conditions** tab, you may only change the following fields:

- Category
- Code
- Description

On the **Budgetary Control** tab, you may only change the following fields:

- Award
- Task
- Resource Groups
- Resources
- Amount Type
- Boundary Code

On the **Funding Source Details** tab, you may only change the following fields:

- Bill to Address
- Ship to Address

On the **Contacts** tab, you may only change the following fields:

- Last
- First
- Title
- Usage
- Area Code
- Telephone Number
- Extension
- Type

On the **Personnel** tab, you may only change the following fields:

- Full Name
- Award Role
- Effective: From

On the **Compliances** tab, you may only change the following fields:

- Indirect Cost Schedule
- Indirect Cost Rate Fixed Date
- Allowed Cost Schedule
- Billing Distribution Rule
- Billing Cycle
- Terms
- First Billing Offset Days

On the **Compliances tab**, **Billing Format** button, you may only change the following fields:

- No Print
- Print Invoice
- Letter of Credit Drawdown
- LOC Account
- LOC Address
- LOC Contacts
- Agency Specific Form
- Form Name

On the **Reports tab**, you may change the following:

- Report
- Type
- Frequency
- Due Within Days
- Send To
- No. of Copies

On the **References tab**, you may only change the following fields:

- Reference
  - Value
4. Select **File > Save** to save your changes.

The screenshot shows a window titled "Billing Format" with a blue header bar. It contains several configuration options:

- Labor Invoice Format:** A dropdown menu set to "Summarized Labor".
- Non-Labor Invoice Format:** A dropdown menu set to "Summarized Nonlabor".
- Radio buttons for selection:**
  - No Print
  - Print Invoice
  - Electronic Data Interfa...
  - Letter of Credit Drawdown
  - Agency Specific Form
- Fields and buttons:**
  - Transaction Number:** A text input field.
  - LOC Account:** A text input field.
  - LOC Address:** A button.
  - LOC Contacts:** A button.
  - Form Name:** A text input field.