RESEARCH **ADMINISTRATION RAMP MANAGEMENT** PORTAL

# HOW TO REQUEST AN ADVANCE ON AN EXISTING AWARD

## **Award Modification Request**

This guide shows how to create an Award Modification Request to request an advance on an existing award and submit it for review. (Typically, the PI or Study Staff requests modifications. Anyone with an Editor role on the award can do so).

## To request an Advance on an Existing Award

- 1. From the Awards tab on the Grants page, open the award workspace that needs an advance.
- 2. From the award workspace, click Request Award Modification.

Bashboard	Agreemer	nts Export Control	Facilities Gra	ants IACU	IC IR	B
Pulluling Proposal	Complex Projects	Awards Reports Help Cente	I			🚱 Неір
Active	SS Adva	nce for Existing Av	ward		0000070401	Funding Award
Next Steps	PD/PI:		Bruce Locke		Award Date:	
View Award	Specialist:		Susanne Stamm		Start Date: End Date:	7/1/2021 6/30/2026
Printer Version	Designated Reviewer Award Approver:	:	Carrie Pittman		Award Type: Award Structure:	Award Standard
Request Award Modification	Approximite the Auministrative Conta	nstitute: ct:	Chemical Engineering		Sponsor Award #:	FDCF589
Create Continuation	Direct Sponsor: Prime Sponsor:		Florida Department of Children U. S. Admin for Children and Fa	amilies		
Team Disclosure Status	Current Total Project Current Total Award	Period Commitment: Amount To Date:	\$340,013 \$340,013			
Terms And Conditions	Awarded Funding Pro	posals:				
	ID	Name		Principal Investigator		Status
% Set Award Relationships	FP00001472	SS Advance for Existing Award		Bruce Locke		Awarded

On the "Request Details" smartform page, enter one of the following advance types in Q1:

- Advance of Time Only
- Advance of Funds & Time
- Advance of Funds Only •

Date requested auto-populates with current date. Provide details in Q3 for the advance being requested. The information required for approval is available in the "Award Modification Request Quick Sheet" located on the RAMP Grants Help Center tab. Upload the required supporting documents in Q4, then click "Finish."

Request Details Creating New: Award Change Request Request Details	Enter this information in Q3 as required for the advance type being requested.
1. * Indicate the award modification type: 3	Amount requested for advance:
2. Date requested: 4/13/2021  3. * Full description of reguested changes:	Advance period requested:
	Backing (Dept, Fund, & Project ID#):
	Available Backing Funds:
4. Supporting documents:	Existing advance? (Y/N):
Name There are no items to display <b>5. Specialist:</b> Susanne Stamm	Cost-share in proposal? (Y/N):

3. From the modification request workspace, click **Submit to Specialist**. On the Submit to Specialist form, include any additional optional comments, then click **OK**.

	Submitted By:	Bruce Locke	Request Date:		4/13/
Edit Modification Request	Specialist:	Susanne Stamm	Award:		SS Advance for Existing Award ( 000007)
Printer Version					
Submit to Specialist	History Attachm	ients			
Withdraw			Ne date te diaplay		
Сору			No data to display.		
Assign Submitter					
Log Comment					1
	Submit to Specialist				
	Submit to Specialist		-		
	Submit to Specialist		-		
	Submit to Specialist     1. Comments:     2. Supporting d	locuments:	-		
	Submit to Specialist     1. Comments:     2. Supporting d     + Add	locuments:	-		
	Stomit to Specialist	locuments:			
	Stomit to Specialist      1. Comments:      2. Supporting d     + Add     Name     There are no	locuments:			
	Stomit to Specialist      I. Comments:      Z. Supporting d     + Add     Name     There are no	locuments:		-	

The award modification request transitions to the Review state and appears in the assigned specialist's inbox.

NOTE: The Specialist and the Submitter are the only personnel that receive notifications on an AMR.

## **Award Modification**

#### **Department Edits:**

Study Staff (PI/Dept Reps) will receive an email notification to reconcile the advance budget(s) and request ancillary reviews for departmental approval (if applicable).

1. Click the link in the email notification to open the modification workspace.

NOTE: The award modification will not show up in the PI or study staff's "My Inbox" on the Dashboard. However, they can search for all modifications in "Draft" state on the Award Modifications tab under the Award menu to see draft modifications to which they have access.

2. On the award modification workspace, click the "Edit Award Modification" button.



3. Next, navigate to the "Budget Reconciliation" smartform page and click on the "Select the Budget Allocation to display:" drop-down arrow to select the budget(s) to be reconciled.

E Compare Award Modifications	You Are Here: SS Advance for Existing A Editing: 0000070401-M Award / Authorized Bud	ward > 😭 100552_Locke_Advance OD001 dget Reconciliation 🔞		4 Go to forms menu 🗎 Print 🔻 🕑	
Related Items Budget Allocations	All Allocations		Current Allocation		
Budget	Total Sponsor Awarded to Date: 🚱	\$340,013	Total Sponsor Awarded: 🚱	\$0	
Reconciliation	Total Reconciled to Date:	\$340,013	Total Reconciled: 👔	\$0	
Completed Award Modification	Difference:	S0	Difference: 🔞	\$0	
	Select the Budget Allocation to display:	Undo Al Changes	Start Date:	End Date:	
Select the Budget Alloca None Selected	ation to display: 🕢 t basis				
None Selected					
100552 214000 523					

4. In the adjustments column, insert the costs being requested for the advance until the Current Allocation "Difference" equals \$0, select the next budget in the "Select the Budget Allocation to display" drop-down list to be reconciled. Once all the budget(s) have been reconciled, click "Save" and "Exit."

E 🕄 Validate 🚳 Compare 🛛 «	Award / Authorized Bud	lget Reconci	liation 😧			4 Go to forms menu 🔒 Print 🔻 🔞 Help
Award Modifications	All Allocations				Current A	llocation
Financial Setup	Total Sponsor Awarded to Date: <table-cell></table-cell>	\$3	40,013		Total Sponsor Awarded: 😧	\$629,514
Related Items	Total Reconciled to Date:	\$3	40,013		Total Reconciled: 😮	\$340,013
Budget Allocations	Difference:		\$0	ſ	Difference: 🕜	\$289,501
Budget Reconciliation						
Completed Award	Select the Budget Allocation to display: 🕻	100552 214000 523	Undo Al Changes		Start Date: 7/1/2021	End Date: 6/30/2023
Modification	Budget Categories		Baseline	Rollup Adjustments	Adjustments	Active Allocation Total
	Senior Personnel	SRPERS	\$93,499	\$0	† S0	\$93,499
	Other Personnel	OTPERS	\$87,500	\$0	† 50	\$87,500
	Equipment	EQUIP	\$50,000	\$0	† S0	\$50,000
	Domestic Travel	DOTRAV	\$12,000	\$0	† \$0	\$12,000
	Foreign Travel	FOTRAV	S0	\$0	† S0	\$0
	Tuition	TUITIO	\$11,114	\$0	50	\$11,114
	Supplies	SUPL	\$25,000	\$0	† S0	\$25,000
	Contractual Services	CONSV	\$18,000	50	† S0	\$18,000
	Patient Care Costs	PCC	S0	\$0	† <b>S</b> 0	\$0
	Subaward Direct < \$25,000	SUB<25	S0	\$0	1 50	\$0
	Subaward Direct > \$25,000	SUB>25	S0	\$0	† 50	\$0
	Rent	RENT	\$0	\$0	† S0	50
	Other Expenses	OTHER	\$0	\$0	1 50	50
	Partic. Support Tuition	PTSTUITN	\$0	\$0	t 50	\$0
	Partic. Support Stipends	PTSTIP	\$0	\$0	t 50	\$0
	Partic. Support Travel	PTTRAV	\$0	\$0	t 50	\$0
	Partic. Support Subsistence	PTSUBS	\$0	\$0	† S0	S0
	Partic. Support Other	PTOTHR	\$0	\$0	† S0	\$0
	Facilities and Administration	FACADM	\$42,900	\$0	S0	\$42,900
	Personnel Cost Share Only	PERSON	\$0	\$0	† \$0	\$0
		Total	\$340,013	\$0	\$0	\$340,013
						J
	† Included in Indirect basis					

ward Modifications	All Allocation	ns		Current Allocation		
inancial Setup	Total Sponsor Awarded to Date: 👔	\$340,01	13		Total Sponsor Awarded: 🔞	\$629,514
elated Items	Total Reconciled to Date:	\$629,51	14		Total Reconciled: 😧	\$629,514
udget Allocations	Difference:	-\$289,50	01	(	Difference: 🕜	SO
udget econciliation	Select the Budget Allocation to display:	100552 214000 523 🔻	Undo All Changes		Start Date: 7/1/2021	End Date: 6/30/2023
ompleted Award Iodification	Budget Categories		Baseline	Rollup Adjustments	Adjustments	Active Allocation Total
	Senior Personnel	SRPERS	\$93,499	\$0	t \$96,304	\$189,803
	Other Personnel	OTPERS	\$87,500	\$0	† \$90,125	\$177,625
	Equipment	EQUIP	\$50,000	\$0	† \$0	\$50,000
	Domestic Travel	DOTRAV	\$12,000	\$0	† \$12,120	\$24,120
	Foreign Travel	FOTRAV	\$0	\$0	† \$0	SO
	Tuition	TUITIO	S11,114	\$0	\$11,225	\$22,339
	Supplies	SUPL	\$25,000	\$0	† \$25,250	\$50,250
	Contractual Services	CONSV	\$18,000	\$0	† \$18,180	\$36,180
	Patient Care Costs	PCC	\$0	\$0	† \$0	S0
	Subaward Direct < \$25,000	SUB<25	\$0	\$0	† \$0	S0
	Subaward Direct > \$25,000	SUB>25	\$0	\$0	† <b>\$</b> 0	S0
	Rent	RENT	<b>\$</b> 0	\$0	† <b>\$</b> 0	S0
	Other Expenses	OTHER	\$0	\$0	† <b>S</b> 0	S0
	Partic. Support Tuition	PTSTUITN	\$0	\$0	† <b>\$</b> 0	S0
	Partic. Support Stipends	PTSTIP	<b>\$</b> 0	\$0	† \$0	SO
	Partic. Support Travel	PTTRAV	\$0	\$0	† \$0	SO
	Partic. Support Subsistence	PTSUBS	\$0	\$0	† \$0	SO
	Partic. Support Other	PTOTHR	\$0	\$0	†\$0	SO
	Facilities and Administration	FACADM	\$42,900	\$0	\$36,297	\$79,197
	Personnel Cost Share Only	PERSON	<b>\$</b> 0	\$0	† <b>\$</b> 0	SO
		Total	\$340,013	50	\$289,501	\$629,514
	† Included in Indirect basis				ſ	🛚 Exit 🔒 Save Continu

If the advance being requested is due to delay in receipt of the next increment of funding, skip to the "Send Email" section on page 9.

#### Request Ancillary Reviews, if applicable:

The Study Staff will request ancillary review(s) to obtain the required departmental approvals for the advance being requested, if applicable. Department approval is not required for increemntally funded continuation awards.

- 1. On the award modification workspace, click the "Manage Ancillary Reviews" activity.
- 2. On the "Manage Ancillary Reviews" page, click the [+Add] button.
- 3. On the "Add Ancillary Review" page, to select a department to perform the ancillary review, start typing the department ID in the Organization field and select from the list displayed, select "Advance Account" for the review type, and "Yes" for response required. Enter the advance request details as comments to provide sufficient information to the assigned ancillary reviewers to make an informed decision regarding the advance request. Add any supporting documents, then click "OK."
- 4. You are returned to the "Manage Ancillary Reviews" page where the ancillary review is now displayed, click "OK."



. * Select either an orga	1. * Select either	r an orga	anization or a person as	reviewer:
Organization	Organization:	227000		
	D	ID	Organization	Org Parent
Person:	Person:	<u>227000</u>	Natl High Magnetic Field Lab	Natl High Magnetic Field
* <b>P</b>				
. * Review type:		_		
Advance Account				
. * Response required?	-			
Yes () No <u>Clear</u>				
Comments:				
			<i>h</i>	
			1	
5. Supporting document	s:		//	
5. Supporting document	s:			
5. Supporting document	'S:			
5. Supporting document + Add Name	s:			
5. Supporting document + Add Name There are no items to dis	splay			
5. Supporting document + Add Name There are no items to dis	splay			
5. Supporting document + Add Name There are no items to dis	splay			
5. Supporting document + Add Name There are no items to dis	splay			
5. Supporting document + Add Name There are no items to dis	splay			
5. Supporting document + Add Name There are no items to dis	splay			

entify each	organizati	on or person	who sl	hould prov	ide additic	onal review.		
T AUU	Review Type	Org	Person	Reqd Accep	oted Notified	Comments Docs		
🕜 Update	Advance Account	Natl High Magnetic Field Lab		yes	no		0	

NOTE: A notification is automatically sent to all individuals that have been assigned as an ancillary reviewer for the organization selected.

NOTE: Departmental processes determine who in the list of ancillary reviewers must approve ancillary reviews for that organization. To check to see if the ancillary review has been approved, on the award modification workspace, click the "Reviewers" tab, the ancillary review is approved if the "Completed" column indicates "yes."

ext Steps	Parent Awar	rd:		SS Advance for Exist	ting Award		Effective Date	e:		
Edit Aumed Medification	Description			Advance of Time & F	unds		Specialist:			Susanne Starr
Edit Award Modification	Designated	Reviewer:					Modification	Type:		NGA Revis
Printer Version	Award Appr	over:		Carrie Pittman						
Manage Ancillary Reviews	History	Reviewers	Correspondence	Funding Actions	Terms And Conditions	Change Log	Reviewer Notes			
Manage Tags			•							
Send Email	Review	rers								
Log Private Comment	Designate	d Doviouor								
Log Comment	Designate	u Reviewer.								
	Carrie Pitt	nan								
	Ancilla	ary Review								
	Review Ty	/pe		Person	Organization	Re	equired	Completed	Accepted	
	A share a share a				24.4000					

NOTE: A notification is sent to the assigned Specialist when an ancillary review has been completed.

#### Send Email:

To notify the assigned Specialist that department edits have been completed. A study staff member will click the "Send Email" activity. On the "Send Email" pop-up page, the study staff member will enter an email subject line in Q1, select Specialist and any other necessary recipients in Q2, complete the required fields then click "OK."

Funding Proposal Co	Send Email							
> Grants > Electron-Ion Collider Pro	1. * Email subject line:							
Next Steps	2. * Select at least one group of r	ecipients:						
Edit Award Modification	All team members							
	All editors							
Printer Version	□ All readers							
	☐ Specialist							
<ul> <li>Manage Ancillary Review</li> <li>Manage Tags</li> </ul>	Select any other recipient for	this email: (Only editors and readers	s have access to the award modification.)					
Send Email	First Name	Last Name	F_Mail					
Log Private Comment	There are no items to display	Last Name	L-mail					
D Log Comment								
Award Modification	3. * Comments to be included in	the email:						
	4. Supporting documents:							
	+ Add							
	Name							
	There are no items to display							

NOTE: An email notification is sent to the assigned Specialist.