HURON

Huron Grants

Researcher's Guide

October 2024

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Introduction

This guide shows how to perform key tasks in applying for sponsored funding.

The system supports the application process through a project called a *funding proposal* (or simply *proposal*). Proposals go through the following life cycle:

1. Once you've identified a funding opportunity, as the project's PI or member of their staff, you create a funding proposal. In the proposal and its associated budgets, you supply information required by the funding opportunity. For Federal system-to-system submissions, you can also auto-populate the correct SF424 forms with data from the proposal. When you've completed the proposal, you submit it for internal review.
2. The assigned reviewers in your department and central office review the proposal, and either return it to you for changes, or approve it.
3. When the proposal passes its final review, the central office submits the application package to the sponsor, and manages the proposal's status based on the sponsor's response.
4. If your proposal is awarded, you create continuation proposals or request award modifications as needed over the life of the award.

Terminology

Term / Acronym	Definition
complex project	A funding proposal responding to a funding opportunity that requires multiple, distinct research projects. (Sometimes also called a multi-project proposal.)
multi-project application	The same as complex project. Typically used in reference to the SF424 application forms for such projects.
single-project proposal	A funding proposal responding to a funding opportunity that requires only one research project (in contrast to a complex project).
component	Any of several types of project representations and shared core resources that are organized under a complex project.
overall component	A component that stores information shared across all other components in a complex project, plus other resources needed to support those projects throughout the complex project life cycle.
additional component	All the non-overall components in a complex project. These characterize the individual research projects comprising the complex project and the shared resources necessary to support these projects through the project life cycle.
external component	An additional component describing a project that will be performed by an entity external to the institution submitting the complex project.
internal component	An additional component describing a project that will be performed by the institution submitting the complex project.

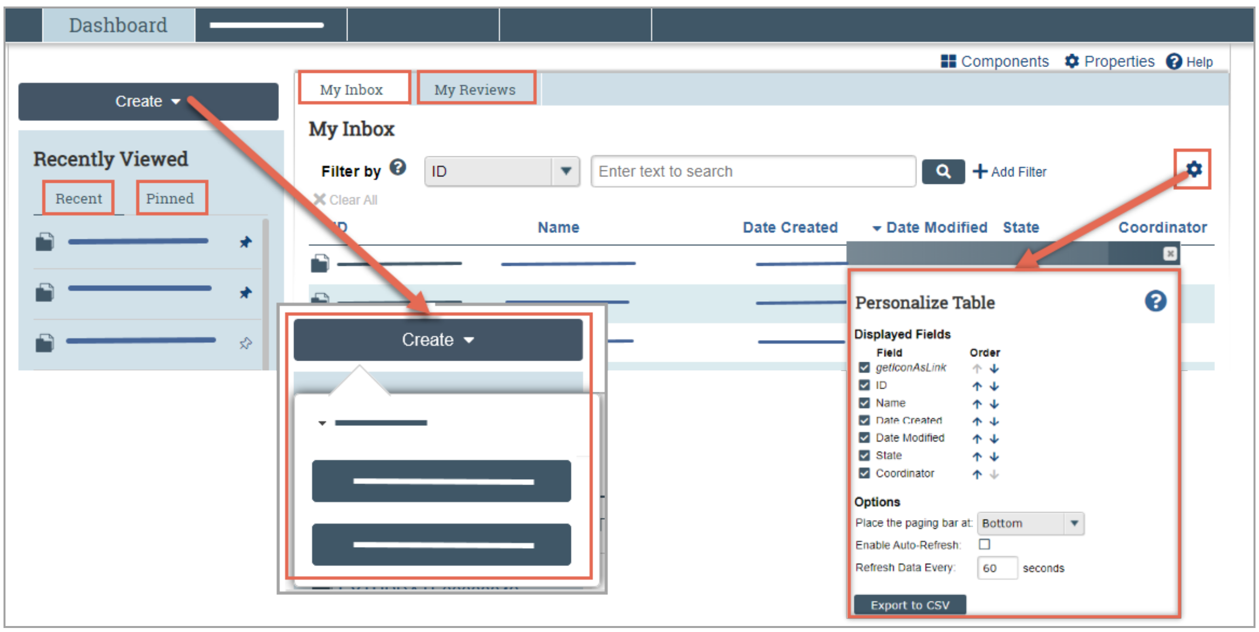
Navigation and Basic Tasks

When you first log in, you will be on your Dashboard, which is the starting point for finding items and performing many basic tasks.

To find key items

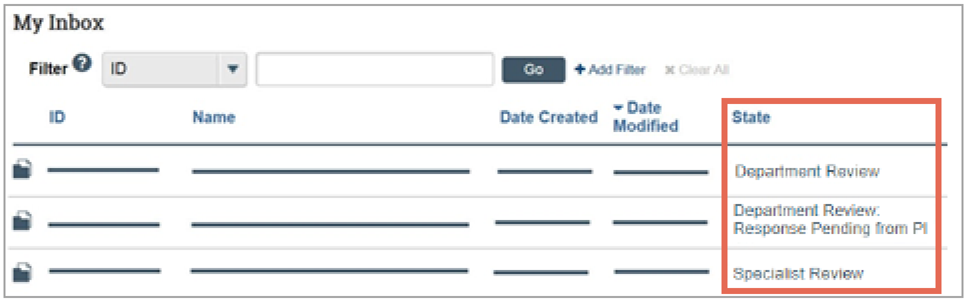
From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox.
- **Create menu and buttons:** Actions you can perform. The menu will not show if you do not have access to any buttons.
- **Recently Viewed:**
  - **Recent**:The last several items you viewed. Scroll through this list to find an item you worked on recently.
  - **Pinned:** You can pin the items in Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



To identify what action is needed

1. Review the state column of records in My Inbox.
   The state gives a clue as to what to do next. For example, “Department Review: Response Pending from PI” means the department reviewer is waiting for you to respond to review comments they made on a funding proposal. You can open it, and make any needed changes, and then resubmit it to the department reviewer.



To open a record awaiting your action

1. From My Inbox, click the record name.
2. The workspace for the record opens.

> **Tip:** A list of activities you can perform appears on the left.

To view record history

1. From the record workspace, click the **History** tab.
2. The history lists the actions performed on the record to date, including comments or generated documents added.

To find a funding proposal not on the Dashboard

1. In the Top Navigator, click **Grants**.
2. In the Sub-Navigator, click either **Funding Proposal** or **Complex Projects**, depending on the type of proposal you're looking for.
3. To further narrow your search, you can:
   a. Sort the records in various ways by clicking the column headings.
   b. Filter the records by name, state, or other attributes, using the filter tool at the top of the list. See Find Data by Filtering on page 27.
4. Click the name of the desired funding proposal.
   The proposal workspace opens.

Create a Single-Project Proposal

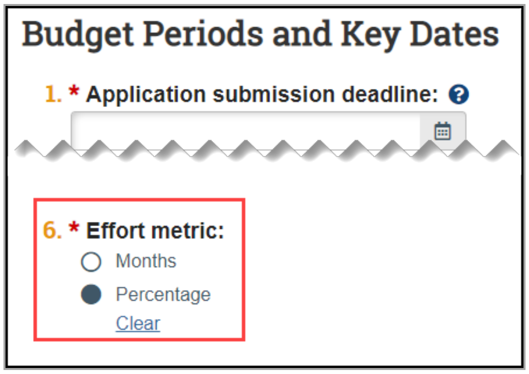
If you’re a PI, study staff member, or a grants specialist, you can create funding proposals in the system. This topic shows how to create a single-project proposal, and check it for errors and omissions. (If you’re applying for a multi-project opportunity, see Create a Complex Project on page 8.)

To create a single-project proposal

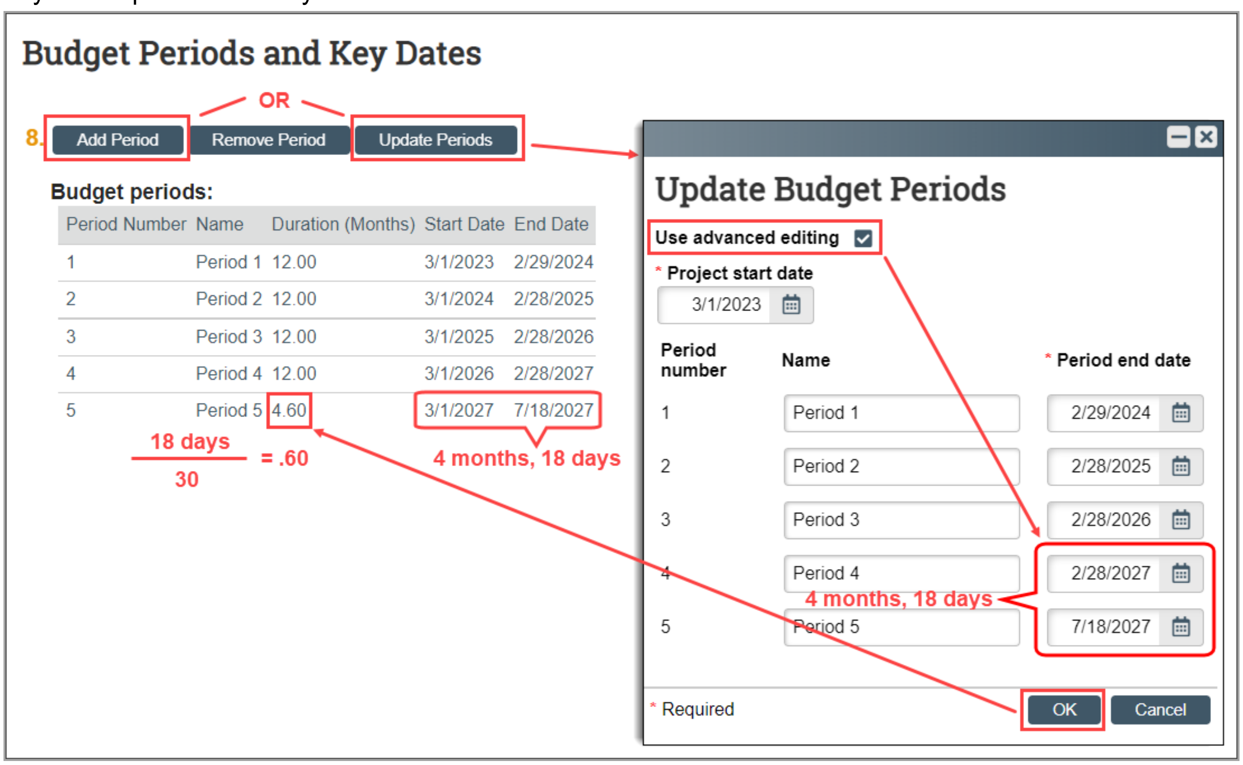
1. From the Dashboard, click the **Create** menu and then select **Create Funding Proposal**.
2. Fill out each page of the funding proposal and click **Continue**.
   Note: The direct sponsor you select determines whether you are subsequently queried for Federal or non-Federal grant information. Once you specify the sponsor, the system creates a budget you can complete.
3. To retrieve a specific Federal opportunity on the Submission Information page, under Type a package ID, opportunity ID or CFDA number, type values in one or more of the four search criteria fields, and click **Find**.

   Grants.gov returns matching opportunities, their requirements, and forms (if supported by Huron SF424).
   Note: A search value in the Competition ID field can only be used in combination with search criteria entered in the other fields.
4. To use the updated forms, click **Refresh Form Support**.
   - This ensures that the SF424 forms are current when you create a proposal with an updated package.
   - It is a crucial step to perform when the government issues an update to the existing forms.
5. Select the desired opportunity from the returned matches.
6. Continue to the Funding Opportunity Announcement page. If it reports:
   - All required forms are supported, but an error message indicates otherwise, return to the Submission Information page and click the **Refresh Form Support** button. If a confirmation prompt appears, click **OK**.
   - Any required forms are not supported, contact your administrator.

7. Continue to the Budget Periods and Key Dates page and supply the required information.
   a. Depending on your institution's implementation, this page may or may not include the Effort metric question shown below.



   Effort metric is the unit used to enter effort and salary requested values in the budget: either months or percentage. The Effort metric question lets you override the system's default effort metric, or toggle the effort metric later in proposal development if necessary.
   To differentiate academic and summer months in the budget, the Effort metric must be months.
   b. On this page, you can add, remove, and update budget periods. To define periods that include partial months, check **Use Advanced Editing**, and specify the end dates, as in the example below. In such cases, the system calculates a decimal value for period duration by dividing the number of days in the partial month by 30.



8. After completing all required fields and any optional fields you choose on the proposal pages, follow the completion instructions on the last page, and then click **Finish**.
   NOTE: Changing budget period duration by editing the start date or editing period intervals may produce changes in budget totals. This is because budget period duration is a variable in calculated salary totals when the effort metric is percentage. It is also a variable in the calculation of inflation for all cost types.

When you finish a proposal, the system automatically creates an empty budget for it. Complete the budget per your department's requirements. (See Complete a Budget for a Proposal or a Complex Project Component on page 10.)

Complex Projects

This section covers tasks involving complex projects.

Create a Complex Project

This topic shows how to create a complex project in Grants, and how to check it for errors and omissions. PIs, study staff members, and grants specialists can create complex projects.

To create a complex project

1. From the Dashboard, click the **Create** menu and then select **Create Complex Project**.
2. Fill out the Project Description & Contacts page and click **Continue**.
   Note: For complex projects, the direct sponsor will always be a Federal agency.
3. To search for a Federal opportunity, on the Federal Grant Information page, under Enter a package ID, opportunity ID, or CFDA number, type values in one or more of the four search criteria fields, and click **Find**.

1. Enter a package ID, opportunity ID, or CFDA number below. Information regarding the Grant Application Package will be downloaded from Grants.gov

Find... Clear

Refresh Form Support

Package ID:

Opportunity ID (PA or RFA number): PA-DD-R01

CFDA number:

Competition ID:

Package Id	Opp Id	Opportunity Title	Opening Date	Closing Date	CFDA	Comp ID	Instructions
PKG00037235	PA-DD-R01	G.g. Training and NIH Ext-UAT FOA (R01)	8/16/2017	8/16/2020	93.865	FORMS-E	

   Grants.gov returns matching opportunities, their requirements, and forms (if supported by Huron SF424).
   Note: A search value in the Competition ID field can only be used in combination with search criteria entered in the other fields.

4. To replace the currently attached forms with any supported updates, click **Refresh Form Support**
5. Select the desired opportunity.
6. Continue to the Funding Opportunity Announcement page. If it reports:
   - All required forms supported, but an error message indicates otherwise, return to the Submission Information page and click the **Refresh Form Support** button. If a confirmation prompt appears, click **OK**.
   - Any required forms not supported, contact your administrator.
7. From the Left Navigator, click **Validate**.
8. Correct any errors, then go to the last page and click **Finish**.
   The system automatically creates the Overall component for the complex project.

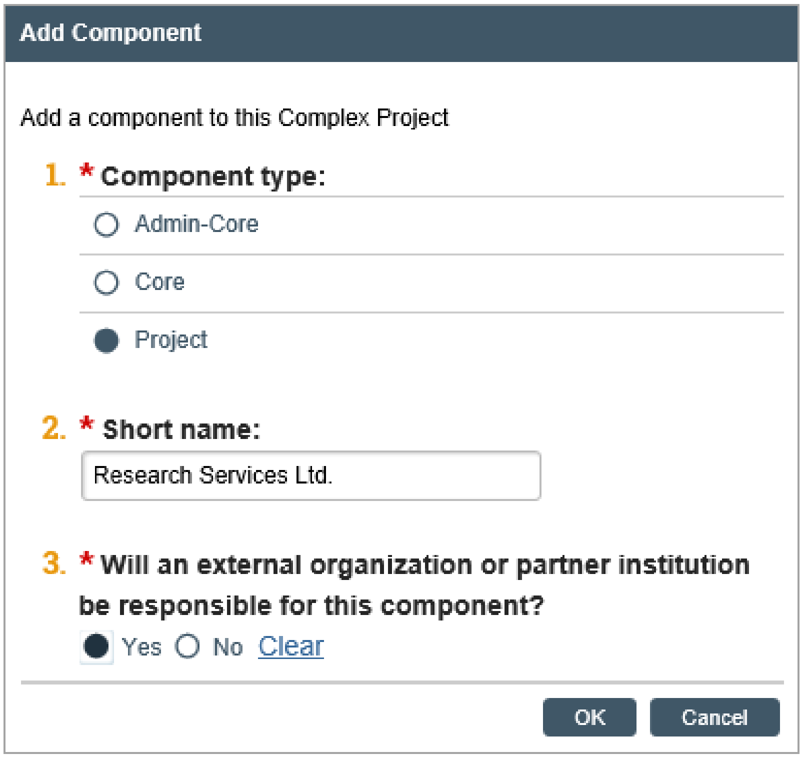
Once a complex project is finished, you can add component projects to it and complete them. (See Add a Component to a Complex Project on page 9 and Finish a Complex Project Component on page 9.)

Add a Component to a Complex Project

Once complex project is created and an appropriate complex project opportunity selected, you can add components to it (the overall component is added automatically). (See Create a Complex Project on page 8.)

To add a component to a complex project

1. From My Inbox, or the Complex Projects tab of the Grants page, click the name of the complex project you want to add a component to.
2. On the complex project's workspace, under Next Steps, click **Add Component**.
3. In the Add Component dialog box, select the component type.
   The types offered are determined by the Funding Opportunity Announcement.



4. Provide a name for the new component.
5. Specify whether the work for this component will be done by an entity external to your institution.
6. Click **OK**.
   The newly added component is listed on the Components tab of the workspace.

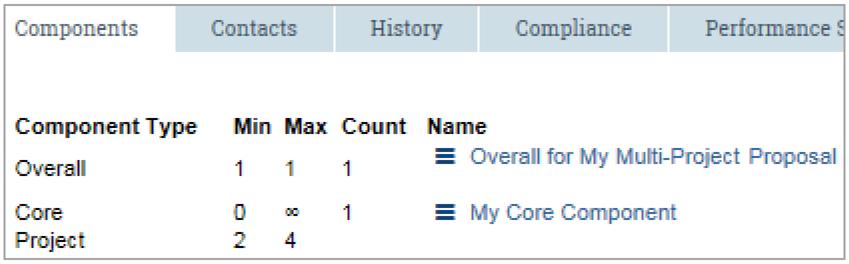
Next, you'll need to supply information to characterize this component project. (See Finish a Complex Project Component on page 9.)

Finish a Complex Project Component

Once a component has been added to a complex project, the next step is to finish it. Typically, whoever creates the complex project finishes the Overall component, but the job of finishing other components may be delegated to other personnel. (See Create a Complex Project on page 8 and Add a Component to a Complex Project on page 9.)

To finish a complex project component

1. From My Inbox, or the Complex Projects tab of the Grants page, click the name of the complex project containing the component you want to finish.
2. On the Components tab of the complex project's workspace, click the component name.



3. From the component workspace, click **Edit Component**.
4. Fill out each page of the component and click **Continue**. (Some fields pre-fill with data from the complex project and the Overall component.)
5. When you have filled out all required fields, follow the completion instructions on the last page, and then click **Finish**.
   If this is a non-overall component, the system creates a budget that you must complete. (See Complete a Budget for a Proposal or a Complex Project Component on page 10.)

Budgets

This section presents topics on creating and managing different types of budgets for single and and complex project funding proposals.

Complete a Budget for a Proposal or a Complex Project Component

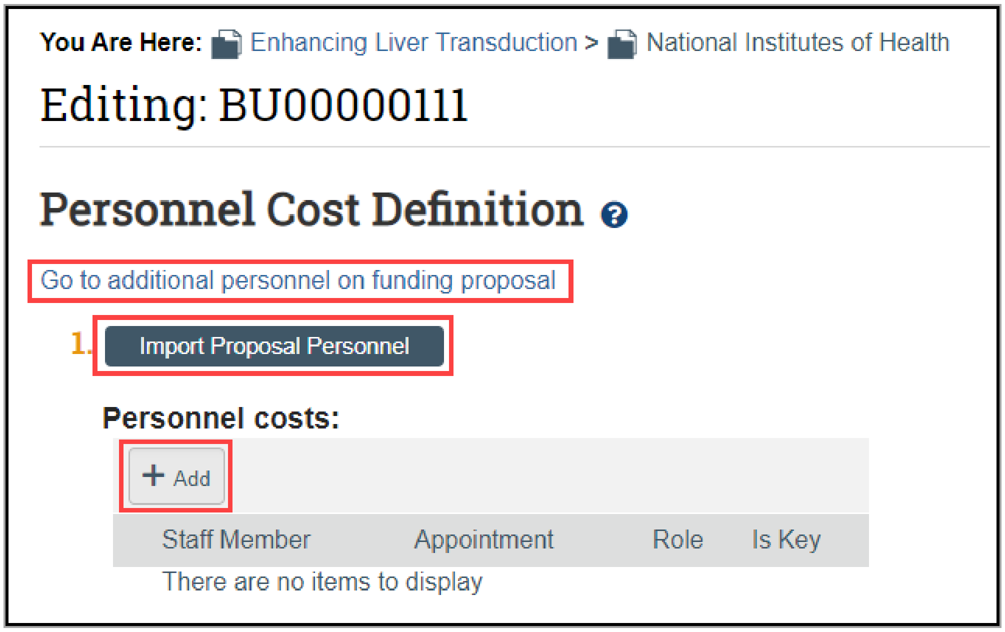
When you finish a single-project proposal or a non-overall component of a complex project, the system automatically creates an associated budget based on the selected sponsor. You can then fill out the budget (and create any additional budgets that are needed).

To fill out budgets for a proposal or a complex project component

1. On the proposal's or component's Budgets tab, click the name of the sponsor budget.
2. Click **Edit Budget**.
3. On the first page of the budget, enter general information, which includes:
   - Option to enter non-standard F&A cost base and rates
   - Choice of cost categories for which to complete detailed budget tables
   - Salary cap (If you change the default, the system updates the monthly salary cap when you save the page.)
   - Inflation rates

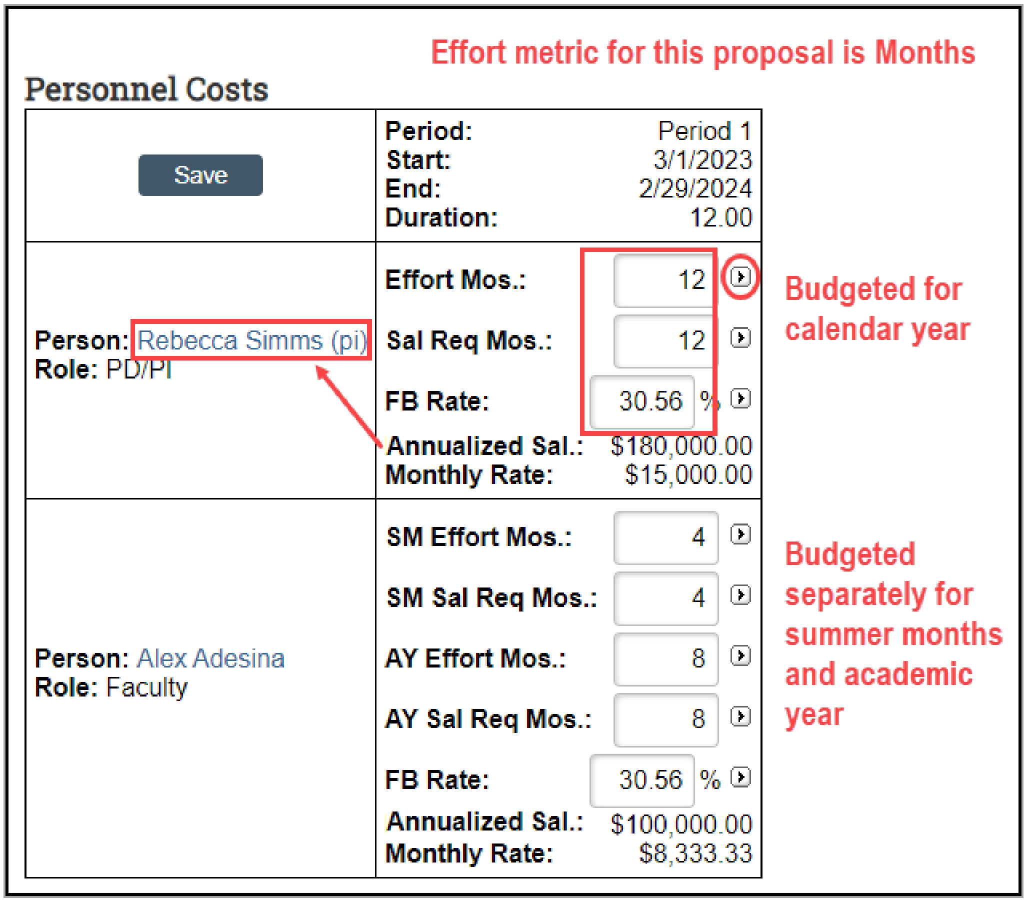
   When done, click **Continue**.

4. On the Personnel Cost Definition page, add paid internal personnel:



   a. To view or add personnel on the proposal, click the **Go to additional personnel on funding proposal** link.
   b. Click **Import Proposal Personnel** to import the PI and all institutional personnel who were added to the proposal's Personnel page as "Senior/Key person on the proposal" or as "Other personnel." (Personnel who were added as "Other significant contributor on the proposal" are not imported.)
   c. To add these personnel individually, click **Add**, and complete the form. You can also create a placeholder salary row for a position yet to be staffed by selecting **Staff Member To Be Determined**.
      Note: If the effort metric for this proposal is months, the system prompts you to select whether to budget the effort for each person by calendar year or to distribute it between summer and academic sub-periods.
   d. When done, click **Continue**.
5. On the Personnel Costs page, click **Edit**.

6. In each personnel cost row, type the planned effort and salary requested on the project.

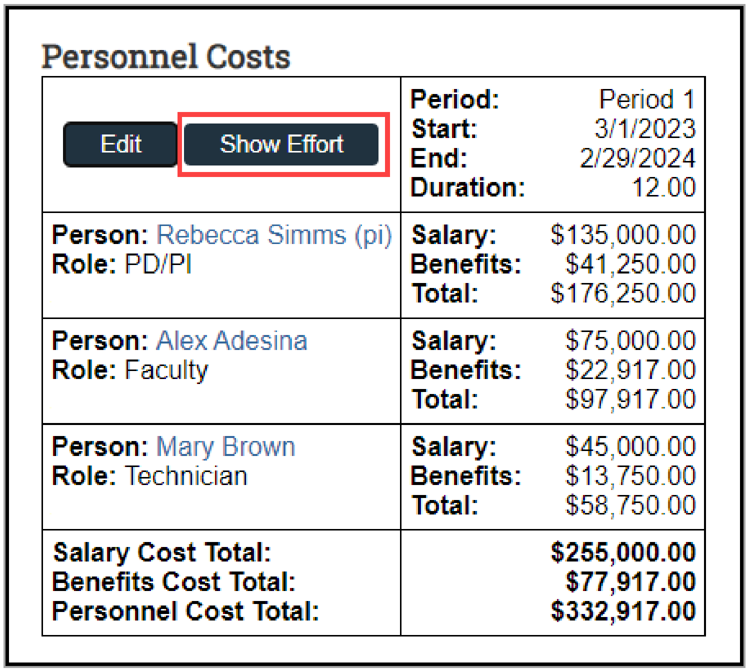


- Depending on the effort metric selected for the proposal, you enter these values either as percentages or as months.
- If the effort metric is months, depending on how personnel were set up on the Personnel Cost Definition page, you may budget a person's effort for the entire calendar year, or distribute it between summer and academic sub-periods.
- If the salary requested for any person is less than their projected effort, when you save the budget, the budget workspace alerts you to create a cost share budget to show how the additional funds will be provided.

For details on the system calculations behind the generated values shown on this page, see Personnel Cost Calculations on page 15.

7. Modify the defaults for the fringe benefit rate and the base salary if appropriate. (To edit a person's base salary, click their name at the left, and edit the Annualized salary field in the form that appears.)
8. Click the push arrows at the right of a budget period column to replicate values in successive periods.

9. When satisfied with your entries, click the **Save** button to update the figures in the Totals view of the budget tables.

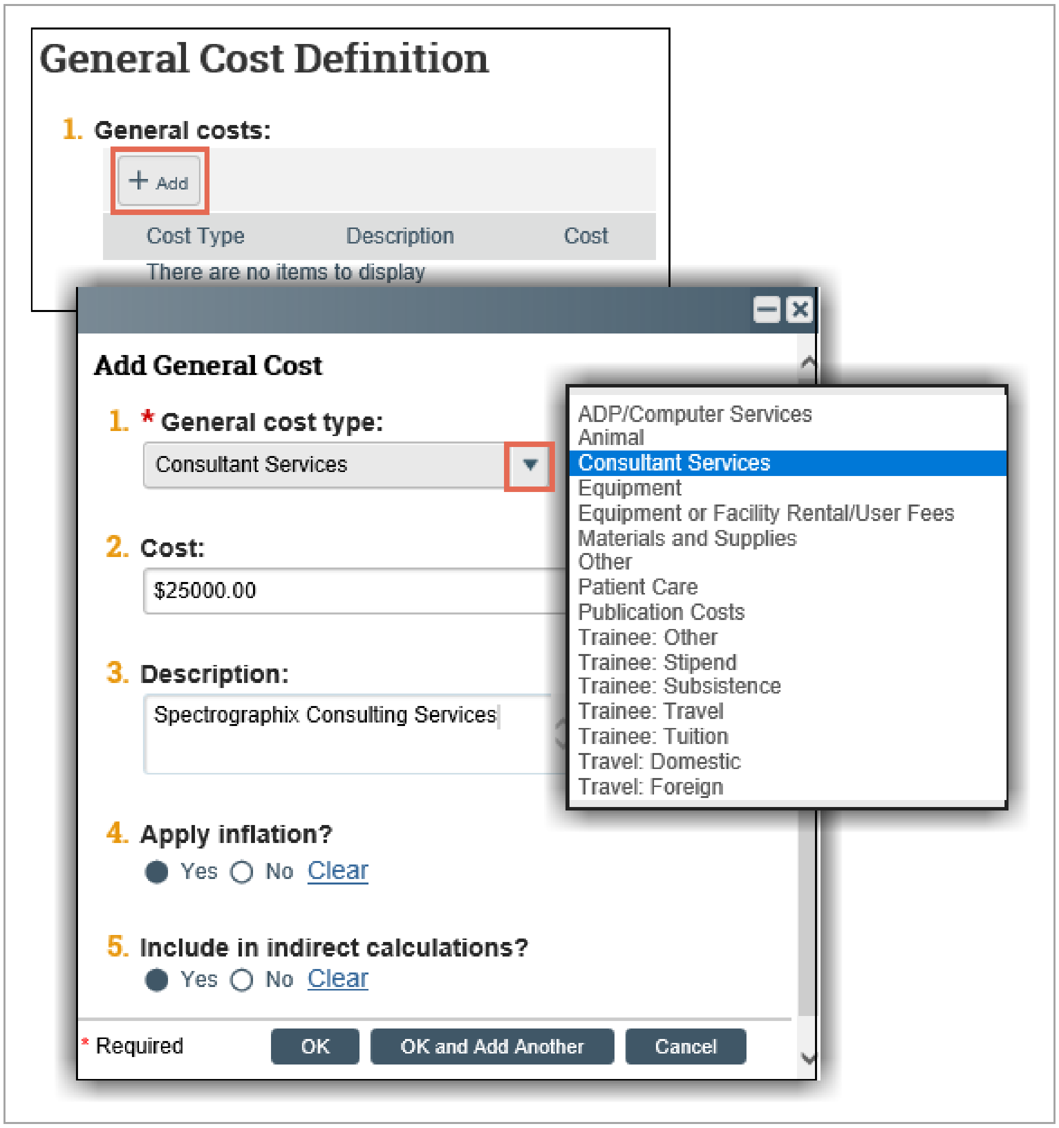


Personnel Costs

Edit Show Effort	**Period:** Period 1 **Start:** 3/1/2023 **End:** 2/29/2024 **Duration:** 12.00
Person: Rebecca Simms (pi) **Role:** PD/PI	**Salary:** $135,000.00 **Benefits:** $41,250.00 **Total:** $176,250.00
Person: Alex Adesina **Role:** Faculty	**Salary:** $75,000.00 **Benefits:** $22,917.00 **Total:** $97,917.00
Person: Mary Brown **Role:** Technician	**Salary:** $45,000.00 **Benefits:** $13,750.00 **Total:** $58,750.00
Salary Cost Total: **Benefits Cost Total:** **Personnel Cost Total:**	**$255,000.00** **$77,917.00** **$332,917.00**

10. To view all rates and totals (with effort and salary requested represented as both months and percentages), click **Show Effort**.
(**Note**: Budget viewers as well as editors can do this.)
11. When done specifying personnel costs, click **Continue**.
12. If you selected detailed budget tables for any cost categories, complete the definition and costs tables for each of them as you just did for personnel costs. When done, click **Continue**.

13. Add line items for general costs not accounted for on detailed budget tables



14. When done, click **Continue**.
15. If you specified Equipment or Facility Rental/User Fees on the General Cost Definition page, these amounts appear as editable values on the General Costs page. Edit these figures as needed to reflect actual anticipated costs for each budget period. When done, click **Continue**.
16. The F&A Cost Overrides page reports the cost-base standard being used to calculate the F&A amount for this budget. It also reports for which categories, if any, that standard will be overridden. Only Grants specialists can change these settings. For details on how these settings work, click the Help button .
17. On the Attachments page of the budget, click **Add** to attach any supporting documents.
18. When satisfied with all your budget entries and attachments, click **Finish**.

The Financials tab on the budget workspace now shows period and cumulative totals for the budget you have completed.

Personnel Cost Calculations

This topic explains the calculations and conversions the system performs for values on the Personnel Costs page of funding proposal budgets. This may help you understand and manage any differences between figures generated by the system and those calculated outside the system during budget development.

- Percentage-to-months conversion:
  Months = (percentage entered) **x** (budget period duration)
- Calendar months-to-percentage conversion:
  Percentage = (months entered) ÷ (budget period duration)
- Academic and summer months-to-percentage conversion:
  Percentage = [(academic months entered) **+** (summer months entered)] ÷ (budget period duration)
- Salary = (salary requested percentage entered) **x** (annualized salary) **x** (budget period duration) ÷ 12
- Monthly Rate = (annualized salary) ÷ 12
- Cost share when effort and salary requested are entered in months:
  - Cost share in calendar months = (calendar months effort) **–** (calendar months requested)
  - Cost share in academic and summer months = (academic months effort) **+** (summer months effort) **–** (academic months requested) **–** (summer months requested)

The system prevents entering percentages greater than 100 and months greater than budget period duration.

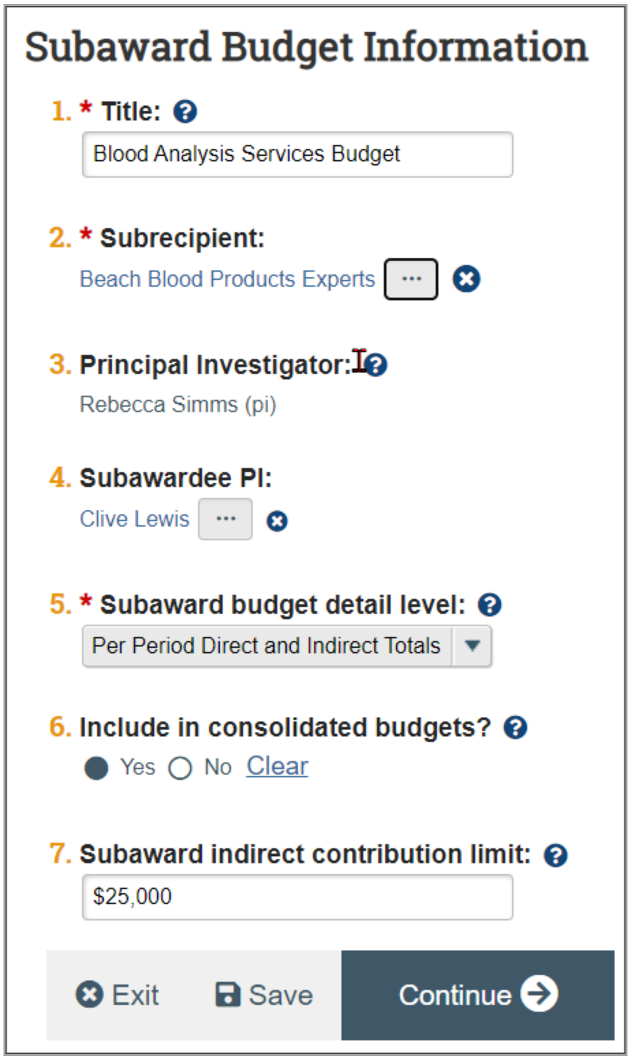
Create a Subaward Budget

If a third party provider is contracted to supply goods or services in support of your project, you can document the subaward funds budgeted for the provider in the system, linking it to the funding proposal's budget. (See Complete a Budget for a Proposal or a Complex Project Component on page 10 and Export a Subaward Budget to a Grants.gov PDF Form on page 17.)

To fill out a subaward budget

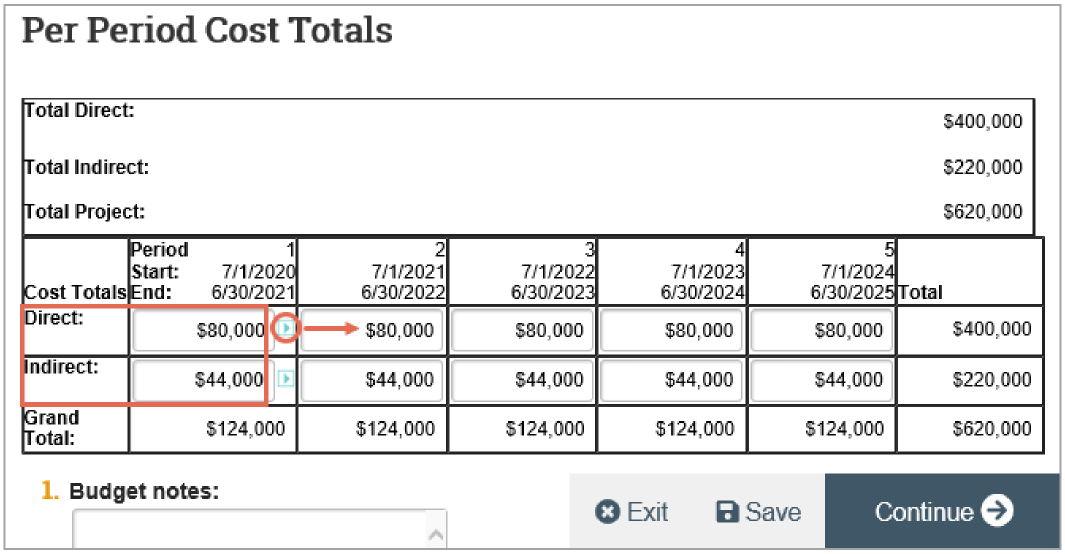
1. From the Budgets tab on the proposal's workspace, click the name of the sponsor budget.
2. From the budget workspace, click **Create Subaward**.

3. On the Subaward Budget Information page, type a descriptive budget title.



4. Under Subrecipient, start typing the subawardee organization's name and pick from the matches, or click the ellipsis to select from the full contractor list.
5. If the subawardee's project has a PI, click the ellipsis, supply the PI information in the resulting form, and click **OK**.
6. Under Subaward budget detail level, choose how to supply financial information. If you select **Per Period Direct and Indirect Total**, a subsequent page for financial input becomes available.
7. Supply any other optional information and click **Continue**.
8. To document other subawardee personnel, on the All Personnel page, click **Add**, complete the form, then click **OK**. When done adding personnel, click **Continue**.

9. If you selected Per Period Direct and Indirect Totals for the Subaward budget detail level in step 6, on the Per Period Cost Totals page, enter direct and indirect amounts for the budget periods. Click the small arrows at the right of a Period column to replicate values in all subsequent periods.



Per Period Cost Totals

Total Direct:	$400,000
Total Indirect:	$220,000
Total Project:	$620,000

Cost Totals	**Period** / **Start:** / **End:** 1 7/1/2020 6/30/2021	2 7/1/2021 6/30/2022	3 7/1/2022 6/30/2023	4 7/1/2023 6/30/2024	5 7/1/2024 6/30/2025	**Total**
Direct:	$80,000	$80,000	$80,000	$80,000	$80,000	$400,000
Indirect:	$44,000	$44,000	$44,000	$44,000	$44,000	$220,000
Grand Total:	$124,000	$124,000	$124,000	$124,000	$124,000	$620,000

1. **Budget notes:**

Exit Save Continue

10. When done entering direct and indirect amounts, click **Continue**
11. On the Attachments page, click **Add** if you want to attach any supporting documents for internal review purposes, such as instructions.
12. When satisfied with your budget, click **Finish**.

Export a Subaward Budget to a Grants.gov PDF Form

When your department is a direct Grants.gov awardee, the system can generate the required SF424 forms from the data you enter in a funding proposal. See Create or Update the SF424 Forms on page 19. Similarly, when your department is an indirect Grants.gov awardee (also known as a subrecipient) through some other institution, the system can generate the required Grants.Gov subaward budget form.

Before you can export a subaward budget to a Grants.gov form, you must first ensure the funding proposal specifies both the Direct Sponsor (the primary awardee that is granting your institution a subaward), and the Prime Sponsor (the Grants.gov agency that published the original Funding Opportunity Announcement). Also, while not a technical requirement, it is assumed financial data has been entered in the funding proposal’s budget.

To export a subaward to a Grants.gov PDF form

1. From the funding proposal workspace, click **Export Budget to Subaward PDF**. (If you don't see this activity listed in the workspace, it's because you have not specified both the Direct Sponsor and the Prime Sponsor in the funding proposal.)
2. On the resulting dialog box, click **OK**.
   A success message indicates the PDF form has been created.
3. To view or download the filled-out form, on the History tab, click **Subaward Budget Export.pdf**.

Create a Cost Share Budget

If a funding proposal’s primary budget specifies salaries exceeding the specified salary cap, or salary requests less than the projected effort, the budget workspace alerts you to create a cost share budget to show how the additional funds will be provided. (See Complete a Budget for a Proposal or a Complex Project Component on page 10.)

To create a cost share budget

1. From the Budgets tab on the proposal workspace, click the name of the sponsor budget that will include cost-sharing.
2. On the budget workspace, click **Create Cost Share**.
3. On the Cost Share Information page, select the cost share type:
   - **Mandatory:** required by the sponsor.
   - **Voluntary Committed:** a voluntary but binding commitment.
   - **Third Party In Kind:** external party non-cash contribution.
4. Under **Cost share entity**, start typing the cost sharing organization’s name, then select it from the list of matches. (You can use “%” as a wild card.) Alternatively, click the **browse** button to browse for the organization.
5. Click **Continue** or **Save**. The system creates a cost share budget and lists it on the Budgets tab of the proposal workspace. If the salaries exceed the salary cap, or any effort percentages exceed the corresponding salary percentages, the system automatically populates the cost share budget you've created with the difference.
6. Complete the other pages of the cost share budget as you would for a primary budget.

View Budget Summaries for Complex Project Components

You can view budget summaries of components from the complex project's workspace. (See Complete a Budget for a Proposal or a Complex Project Component on page 10.)

To view budget summaries for complex project components

1. From My Inbox, or the Complex Projects tab of the Grants page, click the name of the complex project whose component budget summaries you want to view.
2. From the complex project's workspace, click the **Component Financials** tab.
   The Component Budget Summary lists all the additional components and their total amounts.
3. Click the name of a component to display the budgets that have been created for it.
4. Click the name of a budget to display amounts by category.

Components | Contacts | History | Compliance | Component Financials | ...

Complex Project Grand Total: $3,148,324

Components	Categories	Budget Period 1	Budget Period 2	Budget Period 3	Budget Period 4	Budget Period 5	Totals
- ACME Labs	Component Totals:	$292,000.00	$300,760.00	$309,783.00	$319,076.00	$328,649.00	$1,550,268
- National Institutes of Health	Personnel:	$142,000.00	$146,260.00	$150,648.00	$155,167.00	$159,823.00	$753,898.00
	Salaries:	$0.00	$0.00	$0.00	$0.00	$0.00	$753,898.00
	Benefits:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	General:	$150,000.00	$154,500.00	$159,135.00	$163,909.00	$168,826.00	$796,370.00
	Travel:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Animal Costs:	$0	$0	$0	$0	$0	$0
	Animal Ordering:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Animal Maintenance:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Trainee:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Patient Care:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Inpatient	$0.00	$0.00	$0.00	$0.00	$0.00	$0
	Outpatient	$0.00	$0.00	$0.00	$0.00	$0.00	$0
	Subaward/Subcontract:	$0.00	$0.00	$0.00	$0.00	$0.00	$0
	Subaward/Subcontract Direct:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Subaward/Subcontract F&A:	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Total Direct less Subaward/Subcontract F&A:	$292,000	$300,760	$309,783	$319,076	$328,649	$1,550,268
	TotalDirect:	$292,000.00	$300,760.00	$309,783.00	$319,076.00	$328,649.00	$1,550,268
	Total F&A:	$0.00	$0.00	$0.00	$0.00	$0.00	$0
	Project Total:	$292,000.00	$300,760.00	$309,783.00	$319,076.00	$328,649.00	$1,550,268

Create or Update the SF424 Forms

In several proposal states, the proposal team can create or update SF424 application forms for electronically submitted applications, populating them with data from single proposals or complex project components and their budgets.

> **Warning:** If SF424 forms have been edited directly, re-creating or updating them from within the system could overwrite those edits.

To create SF424 forms

1. Click the desired single project proposal, complex component, or complex project containing the desired components from one of these locations:
   - My Inbox.
   - The Grants Funding Proposal page.
   - The Complex Components tab of the Grants Complex Projects page.
   - The Complex Projects tab of the Grants Complex Projects page. (When you create or update the SF424, you will have the chance to select which components to update.)

2. From the project workspace:
   - Click **Create-Update SF424** for a single proposal or a complex component.
   - Click **Update SF424 MPA** for a complex project.

   If all conditions for generating SF424 forms are met, but these activities are not available in the workspace, go to the Submission Information page and click the **Refresh Form Support** button. If a confirmation prompt appears, click **OK**. If these activities are still not available, contact your administrator.
3. Select the SF424 forms to create or update:
   - In the Create-Update SF424 form for a single-project proposal or complex component.
   - In the Update SF424 MPA form under the desired components for a complex project.
4. Click **OK**.

A success alert appears when the system has created or updated the selected SF424 forms.

To update SF424 forms and add missing data

1. Click the **SF424 Link** on the funding proposal or complex component workspace.
2. On the SF424 workspace, click **Edit Grant Application**.
3. On the first page of the SF424, select any optional forms to include in the SF424 application.
4. Click **Continue**, and add or modify data in the SF424 forms as needed. On the last page, click **Finish** to return to the workspace.
5. Click **Validate Submission** to list any errors you must correct plus any potentially problematic conditions.

For information on correcting errors and other SF424 tasks, see the *SF424 Guide*.

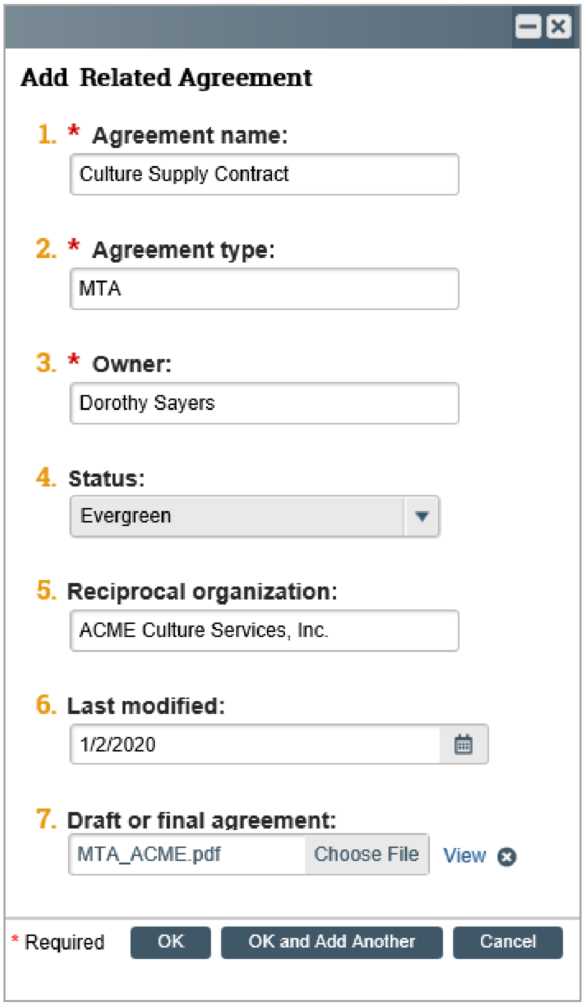
Manage Related Agreements

In configurations where the Grants and Agreements solutions are not integrated, personnel with edit rights on a Grants project can manually manage the relationship between that project and related agreements.

To manage related agreements manually

1. From My Inbox or the Grants page, open the desired project.
2. From the workspace, click **Manage Relationships**.
3. On the Manage Relationships form, click **Add** under Related agreements.

4. On the Add Related Agreement form, enter the required information about the agreement.



5. Supply any of the optional information as needed.
   For example:
   - To specify the status, select an option from the Status list.
   - To attach a version of the agreement to the Grants project, under the question, Draft or final agreement, click **Choose File** and navigate to the document.
6. When satisfied with your entries, click **OK and Add Another**, or **OK** if finished.
   A list of the agreements you've added appears on the Manage Relationships page.
7. Add any comments or supporting documents, then click **OK**.
8. To list all agreements currently managed through this Grants project, click the **Related Projects** tab at the bottom of the workspace and look under Related Agreements.

Submit a Funding Proposal for Review

Once you've completed a funding proposal or a component of a complex project, you are ready to submit it for review. But before you do, this is a good time to certify the proposal or component is complete, correct, and that you will comply with institutional requirements.

To certify a funding proposal or complex project component

1. On the workspace, click **Certify**.
2. Read the attestations in the resuting Certify form.
3. Type any comments and add any pertinent attachments.
4. Click **OK**.
   In the workspace header, the Certified field now says,Yes.

To submit a funding proposal or a component of a complex project for review

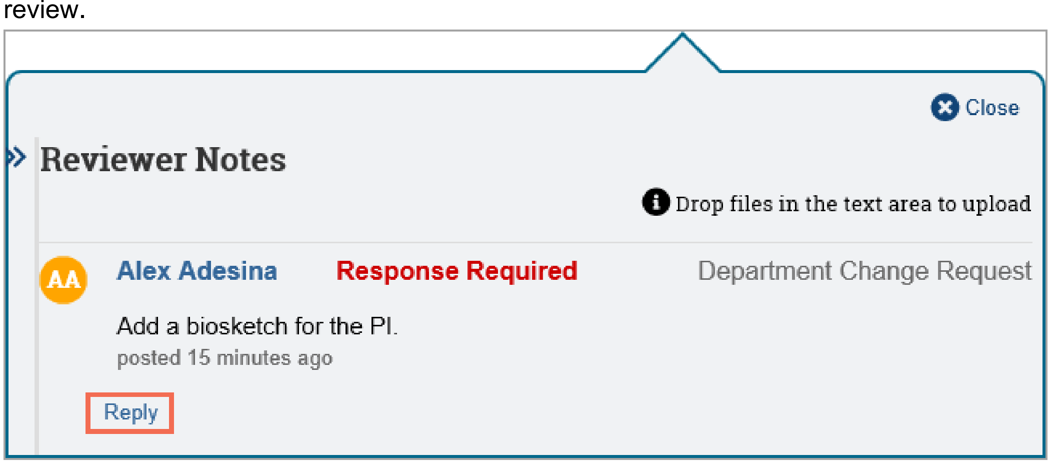
1. From the workspace, click **Submit for Department review**.
2. If the system reports errors, such as required fields that were not completed, fix them and submit again.
3. If the Submit for Department Review dialog box reports required ancillary reviews that have not been completed, see that the assigned reviewers complete their reviews, and submit again.
   When the system reports no errors or outstanding ancillary reviews, the funding proposal or component advances to the Department Review state, and appears in the Inbox of the level 1 department reviewer.
   If the proposal is not yet certified, the system also sends the PI and the administrative contact an email notification, and the proposal appears in their Inboxes.

Respond to a Change Request

After reviewing a funding proposal or complex project component, the reviewer may request changes. When they do, you receive an e-mail notification with a link to the funding proposal, and the funding proposal appears in your Inbox. You must make the appropriate changes and submit the revised proposal for review again.

To respond to a change request

1. Log on and open the funding proposal by clicking its name in the e-mail notification or from My Inbox.
2. From the workspace, click **Edit Funding Proposal**.
3. Navigate to a page containing reviewer notes and click a note icon to open it.
4. If you must edit the project to address the reviewer's comment, close the reviewer note, and make the requested changes.
5. When you've made the change for that reviewer note, or if no change is needed, open the reviewer note, and click **Reply**. If a note is marked "Response Required," you must reply to resubmit the project for review.



6. In the text box that appears in the reviewer note, type a description of the change or explain your response, attach any pertinent files, and then click **OK**.
   Your response appears beneath the reviewer note.
7. Close the reviewer note, and open the next one.
8. When finished responding to reviewer notes, click **Save**, and then **Exit**.
9. On the proposal workspace, click **Submit Changes to Department Reviewer**.
10. Complete the resulting form, and click **OK**.
    The proposal returns to the Department Review state and appears in the inbox of the appropriate department reviewer to be rechecked.

Ancillary Reviews

This section covers tasks involving ancillary reviews.

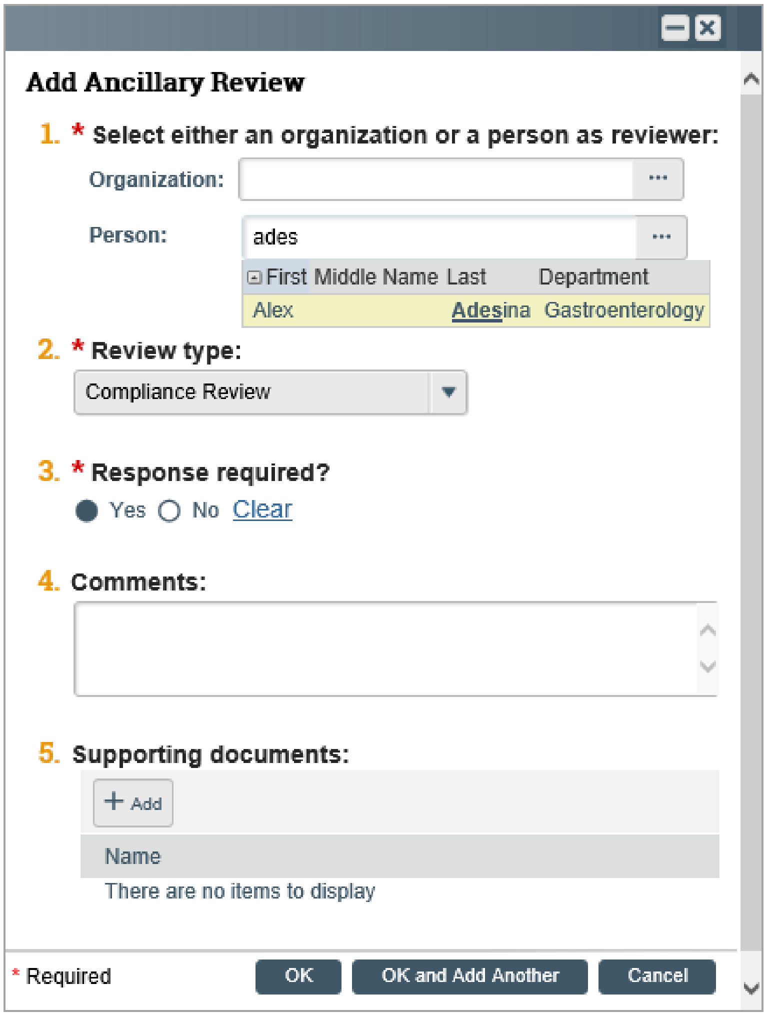
Assign Ancillary Reviewers

Ancillary reviews are carried out in parallel with standard review cycles. As a user with edit rights on a project, you can assign ancillary reviewers, who can submit their reviews at any point in the project workflow. Activities causing a state transition display information about all ancillary reviews assigned for the project. They also warn of any outstanding required ancillary reviews.

To assign ancillary reviewers

1. From My Inbox or one of the tabs on the appropriate Grants page, click the name of the project for which to assign an ancillary reviewer.
2. In the Workspace, click **Manage Ancillary Reviews**.
3. In the Manage Ancillary Reviews form, click **Add**.

4. On the Add Ancillary Review form, select an organization or person to do the review.
   Note: Ancillary reviewers must be assigned to an organization for the Organization option to be available.



5. Select the Review Type.
6. Select whether this ancillary review is required.
   Note: Site Managers can specify a state in which outstanding required ancillary reviews block the workflow and hide the Create Award activity. If a block point is set at Designated Review and a required ancillary review is outstanding, the designated reviewer can still initiate the Request Changes activity, but is blocked from completing the Submit for Final Review activity.
7. Click **OK** or **OK and Add Another**.
8. When finished adding reviewers, add comments or supporting documents as necessary, then click **OK** on the Manage Ancillary Reviewers form.
   You are returned to the project workspace. The assigned ancillary reviewers receive e-mail notifications and the project appears in My Inbox for each of them.

Check the Progress of an Ancillary Review

As a user with Read or Edit rights on a project, you can check the progress of ancillary reviews that have been assigned to it. (See Assign Ancillary Reviewers on page 23.)

To check the progress of an ancillary review

1. From My Inbox or one of the tabs on the appropriate Grants page, open the project whose ancillary reviews you want to check.
2. Click the **Reviewers** tab.
3. Examine the Ancillary Review area at the bottom of the page to see:
   - All ancillary reviews assigned for this project.
   - Whether they were assigned to individuals or organizations.
   - Whether they are required.
   - Whether they have been completed.
   - Whether the reviews found the projects to be acceptable.

Create a Continuation Proposal

A continuation is a type of funding proposal used to request funding of an active award for the upcoming budget year. Typically, it includes a progress report for the closing budget year.

To create a continuation proposal, you must be logged in as a user with a role that can edit funding proposals (typically study staff).

To create a continuation proposal

1. From My Inbox or one of the tabs on the Grants Awards page, click the name of the active award for which continuation funding is needed.
2. Click **Create Continuation**.
   A new funding proposal opens for editing. The system gives it a default name composed of the award name suffixed with the word, “Continuation,” but you can modify it as desired.
3. Enter an application deadline.
4. Supply the progress report information requested on each page, and click **Continue**.
5. On the final page, click **Finish**.
6. On the proposal workspace, click **Submit for Department Review**.

The application deadline helps the Central Office know when the continuation proposal needs to be submitted to the sponsor. The continuation proposal goes through the same approval and submission steps as any other funding proposal.

When the continuation proposal reaches the Awarded state, the specialist assigned to the award creates a continuation-type award modification, and adds the funds the sponsor has released for the next budget period.

Request an Award Modification

Active awards often need to be changed in some way. For example, you may need to address sponsor requests, update awarded amounts, or account for an approved extension. This procedure shows how to create an award modification request and submit it for review. The system supports multiple award modification requests for a single award. Typically, the PI, or administrative contact on the award requests modifications (though several other roles have permissions to do so).

To submit an award modification request

1. Open the award that needs to be changed from the Dashboard or one of the tabs on the Grants Awards page.
2. From the award workspace, click **Request Award Modification**.

3. In the SmartForm, type a meaningful title and description for the modification request, and supply any of the optional information.
4. When satisfied with your entries, click **Finish** to save your work and exit the SmartForm. The system creates the modification request in the Draft state, and takes you to its workspace. The modification request also appears in your inbox until you submit it for review.
5. From the modification request workspace, click **Submit to Specialist**.
6. On the Submit to Specialist form, optionally supply any instructions and supporting documents, then click **OK**.
   The award modification request transitions to the Review state and appears in the assigned specialist’s inbox.

Search Your Solution

To help you work more efficiently, you can use search to locate a wide range of information in your solution. You can search for project data, documents, or content from specific pages on your site. The search results appear in a secondary window and display only those items you have permission to view. Results are ranked to show items where the search term is most prevalent at the top.

After your initial search, you can further refine results using the following filter options:

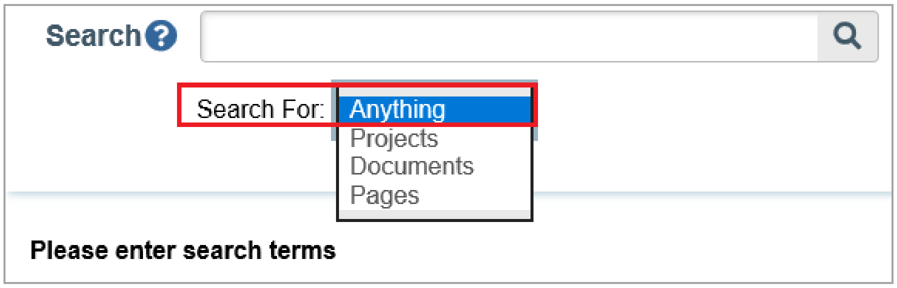
- **Projects**— Projects are the day-to-day items you use to manage your research in a Huron solution. They include items such as funding proposals, studies, protocols, agreements, and disclosures. You can search for any project in your solution using properties on the project, including its name, ID, and description. Depending on the solution, other properties are also available to search. When you select the Projects filter, the system will only display results that match search criteria in your project data.
- **Documents**— Documents are third-party files uploaded to your solution outside the context of a project. When you select the Documents filter, the system will only display results that match search criteria from documents. The search includes metadata on a document, such as its name and description. It also includes the contents of a document. From the results, you can click directly on the provided link to open a document.
- **Pages**— Pages organize information on your site into a hierarchy that you can use to view and manage your work. The Pages filter provides a way for you to search one type of page within your solution - content pages. Content pages are presented outside the context of a project. They supply supporting information for your solution, such as the Help Center, Reports, and Meetings. Dashboards and project workspaces are not included with this filter.

Note: Content on the site is updated periodically. If you are searching for something you just added, results might not be available immediately. Try your search again at another time.

To search your solution

1. In the Top Navigator, click **Grants**.
2. In the **Search** box, type your search criteria. You can use the following operators:
   - **And**: Finds all the specified words.
   - **Or**: Finds at least one of the specified words.
   - **Not**: Excludes the specified word. You cannot start a search with the Not operator.
   - **Quotation marks**: Finds the exact phrase.

3. Press Enter or click the search icon to perform the search.



The search results appear.

4. Click the **Search For** arrow to apply filter of your choice.

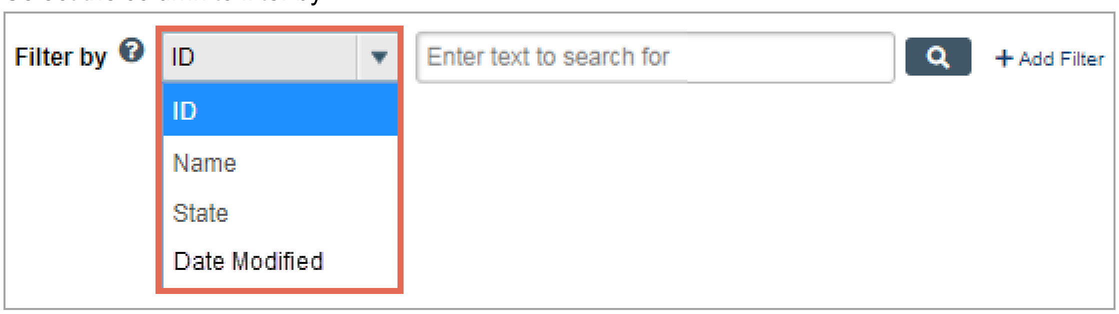
Find Data by Filtering

Many pages contain tables that you can filter to show only specific records. You may also need to filter a list of selection options, so you can find the correct ones to select.

To filter data

In the Filter by bar:

1. Select the column to filter by.



2. Type the beginning characters for the records you want to find. You can also type a % symbol as a wildcard before the characters. Examples:
   - 71 shows all items beginning with 71
   - %71 shows all items containing 71

Tips:
- For operators you can type in the text box, click the Help icon.
- To combine multiple filter criteria, click **Add Filter**.

3. Click the search icon or **Go** to apply the filter.

For more information on finding records and other information, see Navigation and Basic Tasks on page 3.

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