Setting up a New Award
With a previous Pre-Award
If the Award List screen is already open, click on the **Search** button.

Search for the award using any combination of the available fields.

Otherwise select the menu option **Maintain > Awards**....

Or click on the **Maintain Award** button.
Search for the award using any combination of the available fields.

Select the correct award.

Create a NEW ENTRY by selecting the menu option **Edit > New Entry**

Or click on the **New Entry** button.
A new Sequence number will be generated by selecting the New Entry option. The new sequence number will be displayed as shown below.

The next step is to fund the proposal by selecting the menu option **Details > Funding Proposals**...
Click on **Add**

Search for the proposal by using any combination of the available fields and then click on **Find**
Select the correct proposal and click **OK**

The proposal is now funded. Click **OK** to close the window.
**Award Detail Screen:**

Change the status to **Hold** from the drop-down list.

Replace “301B” or “UPAS” with the sponsor award number in the Sponsor Award No. field. Refer to Appendix A for Sponsor Award Number entry.

**Begin Date:** The date spending is officially allowed on the account. *If the pre-award start date is earlier than the start date on the award notice, DO NOT change this date.*

**Effective Date:** Effective date on sponsor award notice.

**Execution Date:** LEAVE BLANK

**Pre-Award Authorized Amount:** Delete authorized pre-award amount.

**Pre-Award Effective Date:** Delete effective pre-award date.

**Title:** If the title is different than the one listed on the sponsor award notice, change title in accordance with sponsor award. Title changes should not be made in the proposal database.

**Note:** For NSF awards make sure the NSF Directorate shows in the Sponsor field. If a directorate is not listed, contact your Grant and Contract Coordinator. They will add the new directorate to the Sponsor Table.
Other Header Screen:

Select the appropriate Template. Each template contains standard terms and conditions for a particular sponsor. If the appropriate template is not listed, select “Default Template (No Terms)”. 

Fill in the Prime Sponsor/ASU Consortium field if applicable. **NOTE:** Federal prime sponsors should be listed only. Refer to Appendix A for Prime Sponsor/ASU Consortium Data Entry.

If the Default Template (No Terms) template is chosen, the payment basis and method must be entered. Otherwise these fields will be automatically entered.
Money and End Dates Screen:

**Obligated Amount:** Amounts obligated to date; sponsor funding provided to date under the award. Does not include cost share. Obligated Total must be equal to or less than Anticipated Total. *This amount is the total amount awarded by the sponsor, including the amount that was previously pre-activated.*

**Anticipated Amount:** Sponsor funding anticipated for the entire project – current obligation plus anticipated incremental funding and future year funding, including possible option years. *This amount is the anticipated total amount awarded by the sponsor, including the amount that was previously pre-activated.*

**Obligation Effective Date:** DO NOT FILL IN.

**Obligation Expiration Date:** End date of current funding period. It must be the same as or earlier than final expiration date.

**Final Expiration Date:** Expiration date of currently funded period plus anticipated unfunded periods, including possible option years.
Contacts Screen:

This screen should already contain sponsor information from the previous pre-activation processed. Click on Modify to add a contact person.

A search is performed by using any combination of the available fields.

Select the right contact and click OK.
The contact’s name is now shown under the **Name/Organization** column instead of the sponsor’s name.

If the contact person is not found, add this person to the rolodex. Refer to Maintaining the Rolodex on the web at [http://researchadmin.asu.edu/coeus/help/](http://researchadmin.asu.edu/coeus/help/) Proposal Data Entry: Lesson 2: Maintaining the Rolodex to add a contact person.

**Reports Screen:**

Click on the **Sync** button to synchronize the sponsor’s reporting requirements from the template chosen under the “Other Header” screen. If the Default Template (No Terms) template was chosen, then the reporting requirements must be manually entered.

Reporting requirements are entered by first selecting the Technical/Management option under the Class window. Once the Technical/Management option is selected, the requirements can be entered by selecting the **Modify** button. The type of report is shown in the Type window.
Progress Report Example:

Final Report Example:

Refer to Reporting Requirement Instructions for report maintenance.
Terms Screen:

Click on the Sync button to synchronize the sponsor’s terms from the template chosen under the “Other Header” screen. If the Default Template (No Terms) template was chosen, then the terms must be manually entered.

Terms are entered by selecting each option under the Terms window. Once an option is selected, terms are added or deleted by using the Add or Delete buttons.

Investigator Screen:

No changes are required, unless there’s a change of Investigator or Investigators’ unit.

Comments Screen:

Click on the Sync button to synchronize the sponsor’s comments from the template chosen under the “Other Header” screen. If the Default Template (No Terms) template was chosen, then sponsor comments must be manually entered.

Subcontracts Screen:

No changes.
Other Screen:
No changes.

Cost Share:

To enter cost share information for the award, if any, select the menu option **Details > Cost Sharing**...

**Cost Sharing Screen:**

The required fields are Type, Fiscal Year, Source Account and Destination Account. This screen is automatically populated when the proposal is funded, if and only if the proposal has any cost share. If there are different sources committing to cost share, list all the sources separately with their respective commitments under Amount. The Total Amount should reflect the total cost share commitment.

The Comments section can be used to describe the source of funds (PI Funds, equipment, etc.).
**Indirect Cost:**

Because a proposal was funded, an additional line with the proposal’s indirect cost rate is now listed. Delete this line by selecting it and using the *Delete* button. Do not enter an end date.

Once all the previous information is entered, you are ready to save your work. The new award has been set up. But don’t forget you still have to check allocation information.

Select the menu option **Details > Allocation…**
Or click on the Allocation button.

**Award Allocation Screen:**

The Fiscal Year Total should always add up to 100. Only one RID Unit should be checked. The Allocation Start Date should always be a year earlier than the Begin Date of the award and the Allocation End Date should always be a year after the Final Expiration date of the award. Save allocation when done.

Save again and close the award screen.

If the current activation must get updated and the paperwork has NOT gone to SPA/GCA, use the Edit button to make any corrections. Otherwise, prepare a new activation using the New Entry button. Any corrections made to the Money and End Dates Screen will create a new amount sequence number in the award history when you save.