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# **IBISResearch: Manage Awards**

**Office of Research Administration**

# Introductions

Answer the following questions:

1. What is your name?
2. What department do you work in?
3. What is your experience with proposals or grant applications?



# Workshop Etiquette



Silence Phones

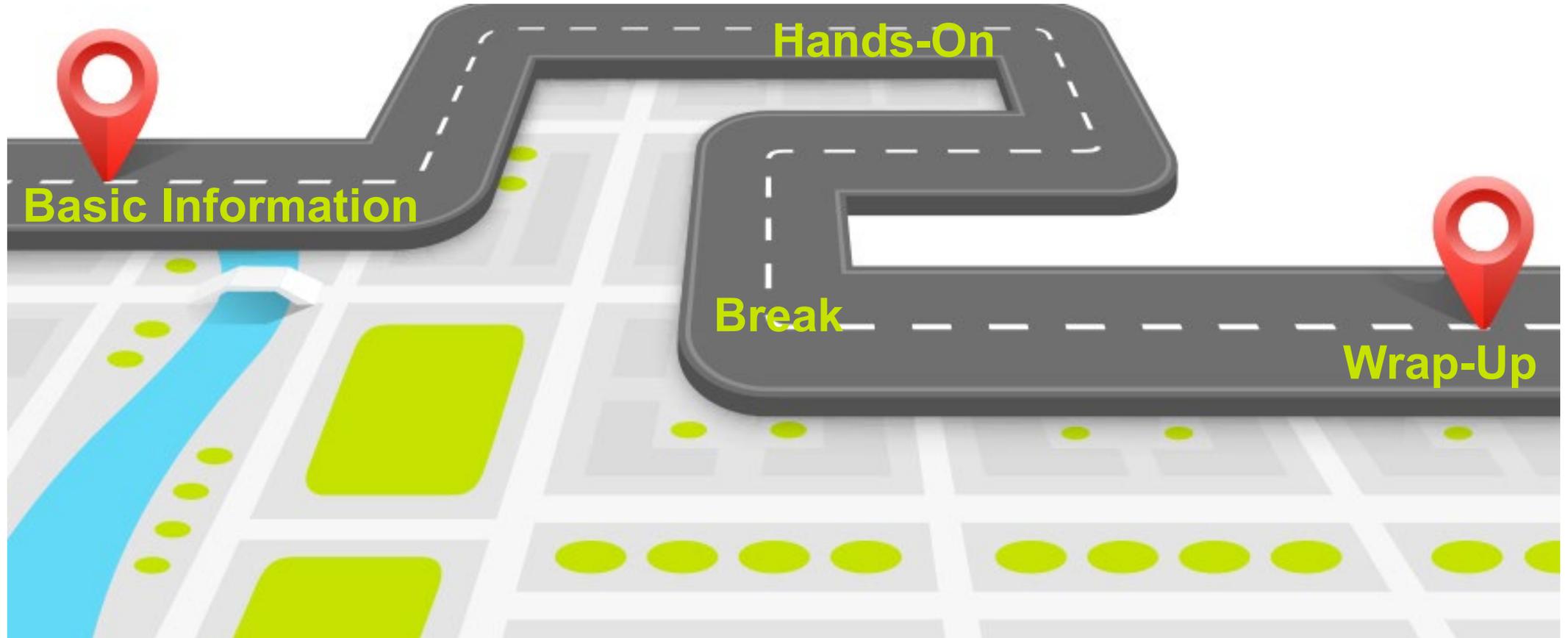


Ask For Help



Ask Questions

# Agenda



# Learning Objectives

After this session you will be able to...

- Practice how to edit and complete the Funding Award in IBISResearch
- Identify how to create an award modification in IBISResearch
- Demonstrate how to create follow-up proposals (continuation, revision, renewal and resubmission)





**BIG  
JOURNEYS  
BEGIN WITH  
SMALL  
STEPS**

# Workday



Remains the official financial system and record of the award.

# Award Components

## Project Types

Award

Main Component. Contains all the data and relationships necessary to describe the full scope of an Award.

Subaward

Represents an outgoing Subaward.

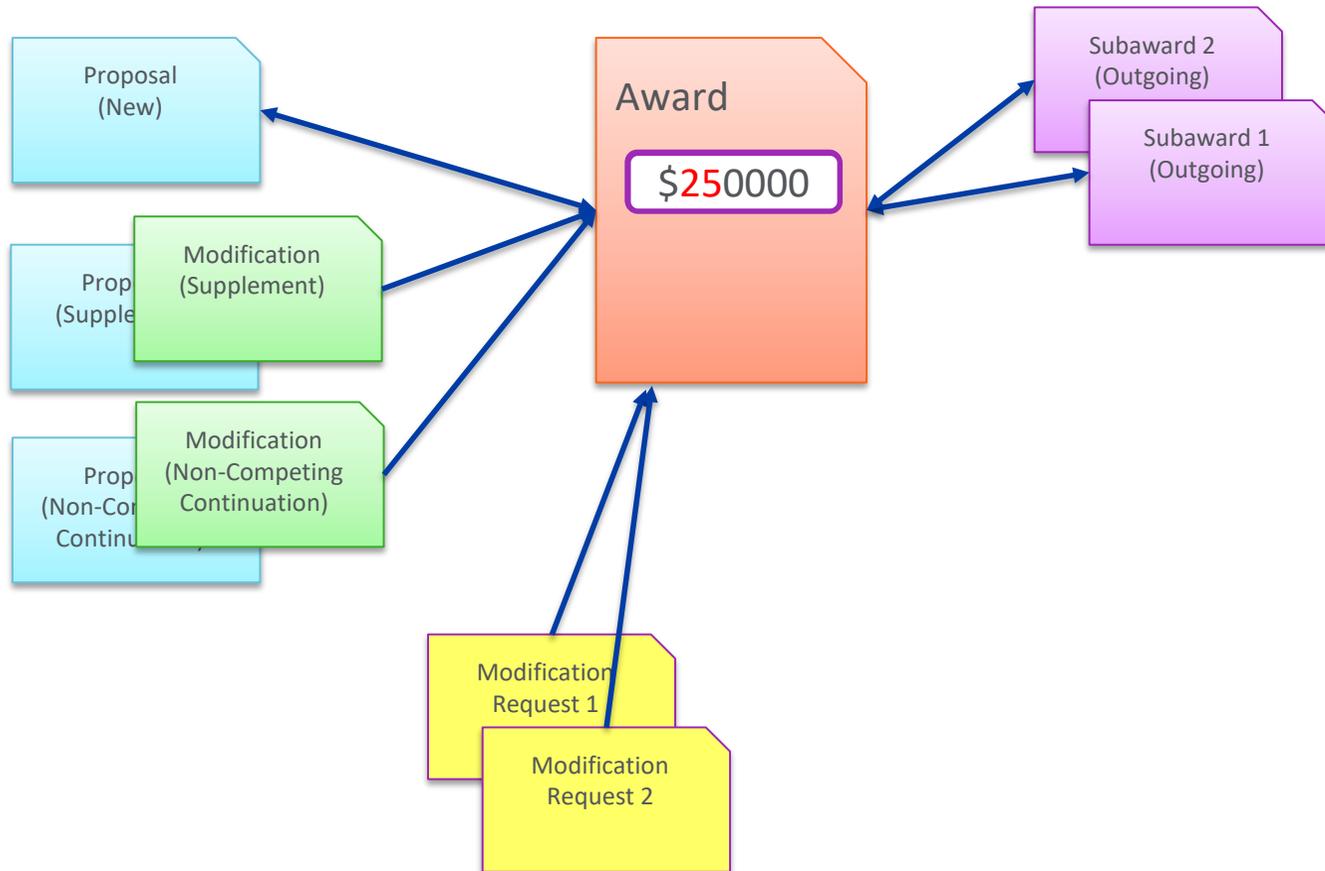
Modification  
Request

End User process to request an update that is needed on an award.

Modification

Captures the information that is updated on an award.  
Provides an audit trail for Award changes.

# Award Relationships



# IBISResearch Award Roles (ORA)

User Role	Description	Activities
<b>Contract Specialist</b>	Person in the Office of Research Administration who creates and approves Outgoing Subawards	<ul style="list-style-type: none"><li>• Create &amp; edit Subaward SmartForm</li><li>• Activate a Subaward</li></ul>
<b>Award Approver</b>	User responsible in the Office of Research Administration for reviewing and approving awards prior to activation	<ul style="list-style-type: none"><li>• Request that the specialist make changes to an award during the review process</li><li>• Send an email message to the specialist assigned to the award</li><li>• Activate an award</li><li>• Request a modification to an active award</li></ul>

# Funding Award Editors



## 4. Administrative personnel:

a. Administrative contact: ?  
Carmen Alverado (coord) ... x

## b. Select team members that have edit rights: ?

Last Name	First Name
Brown	Mary

## c. Select team members that have read-only rights: ?

Last Name	First Name
Cook	Mark

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# New Terminology

# New Terminology

- Ancillary Review
- Funding Award
- Funding Proposal
- Guest List
- SmartForm
- Specialist
- SPO
- State
- Study Staff
- Tags

IBISResearch Terminology	Definition
Ancillary Review	Refers to reviews by other offices or individuals to provide feedback or higher approval. Ancillary reviews are conducted in parallel with Department and ORA reviews. For example, the waiver of Indirect Costs requires an Ancillary Review. Ancillary Reviews are typically initiated by the PI/Study Staff and approval is required prior to submission of the proposal.
Funding Award	This is an award in IBISResearch. Award numbers in IBISResearch will begin with IBIS. For example: IBIS0000135.
Funding Proposal	The proposal record created in IBISResearch to document and track the request for funding. This is similar to the InfoEd proposal. Funding Proposals are identified by the FP Number, for example: FP0000036.
Guest List	List of users who have edit or view only privileges in IBISResearch.
SmartForm	These are the pages listing the questions or uploads required to complete the proposal, award, or agreement. These are "smart" form pages because they will hide or show relevant questions based upon selections made and questions answered previously. . The Funding Proposal in IBISResearch is an example of a SmartForm.
Specialist	This is a role in IBISResearch and refers to the individuals in the Office of Research Administration handling grants and agreements.
SPO	SPO refers to the Office of Research Administration.
State	State is the status in which the proposal, award, or agreement is in the IBISResearch workflow. In IBISResearch, the state is indicated on the top left in an orange box. For example, if a proposal is in the Department Review state, it means it was routed to the responsible department for review, and it is pending approval by the department.
Study Staff	This is a role in IBISResearch that refers to individuals who have edit rights for a proposal/agreement.
Tags	Tags are special designations or methods of identifying certain information in a proposal. UM uses Tags to collect the primary scientific classification for each proposal. This is a required entry on all Funding Proposals, and it is recommended that the PI/Study Staff select the scientific classification which apply to the proposal.

# Workspace

**Workspace:** Refers to the home page from where you can navigate and initiate activities.

The screenshot displays the 'Draft' workspace for a funding award. The top navigation bar includes 'Dashboard', 'Agreements', 'Grants', and 'SF424 Center'. The main content area shows details for 'Project Champions (Feb 2020) Jada Ramhofer'. A red box highlights the 'IBIS00000056' ID and 'Funding Award' type. Another red box highlights the 'Edit Award' button in the 'Next Steps' section. A third red box highlights the 'FP00000214' ID in the 'Awarded Funding Proposals' table.

**IBIS00000056** Funding Award

**Next Steps**

- Edit Award
- Printer Version

**Project Champions (Feb 2020) Jada Ramhofer**

**PD/PI:** Rebecca Simms (pi) **Award Date:** 2/27/2020

**Specialist:** Ava Lambert **Start Date:** 1/1/2021  
**End Date:** 12/31/2024

**Designated Reviewer:** **Award Approver:** Judy Jones (approver1) **Award Type:** Award  
**Award Structure:** Standard

**Approving Dept/Div/Institute:** Gastroenterology **Sponsor Award #:** R01-NCI-12345  
**Administrative Contact:** Carmen Alverado (coord)

**Direct Sponsor:** National Institutes of Health (NIH)

**Current Total Project Period Commitment:** \$653,588  
**Current Total Award Amount To Date:** \$321,588

**Awarded Funding Proposals:**

ID	Name	Principal Investigator	Status
FP00000214	Project Champions (Feb 2020) Jada Ramhofer	Rebecca Simms (pi)	Award Notification Received



# Activities

**Activities:** Refers to the tasks listed on the left side of the screen on the workspace. They are based on security roles.

The screenshot displays a workspace interface. On the left is a sidebar with a 'Draft' header and a 'Next Steps' section containing 'Edit Award' and 'Printer Version' buttons. Below these are several activity options, with a red box highlighting the following: 'Team Disclosure Status', 'Terms And Conditions', 'Manage Ancillary Reviews', 'Set Award Relationships', 'Upload Award Documents', 'Manage Deliverables', 'Manage Relationships', 'Manage Tags', 'Create Agreement', 'Send Email', 'Manage Guest List', 'Log Private Comment', and 'Log Comment'. A red callout bubble labeled 'Activities' points to the 'Manage Ancillary Reviews' option. The main content area shows details for 'Project Champions (Feb 2020) Jada Ramhofer', including fields for PD/PI, Specialist, Designated Reviewer, Award Approver, Approving Dept/Div/Institute, Administrative Contact, Direct Sponsor, Prime Sponsor, Current Total Project Period Commitment, and Current Total Award Amount To Date. Below this is a table of 'Awarded Funding Proposals' with columns for ID and Name. At the bottom, there is a 'Cumulative Award Totals' section with a table for 'This Award:' showing 'Direct' and 'Indirect' categories, and a 'Proposed' column.

**Draft**

**Next Steps**

Edit Award

Printer Version

Team Disclosure Status

Terms And Conditions

Manage Ancillary Reviews

Set Award Relationships

Upload Award Documents

Manage Deliverables

Manage Relationships

Manage Tags

Create Agreement

Send Email

Manage Guest List

Log Private Comment

Log Comment

**Project Champions (Feb 2020) Jada Ramhofer**

PD/PI: Rebecca Simms (i)

Specialist: Ava Lambert

Designated Reviewer: Judy Jones (appr)

Award Approver: Carmen Alverado

Approving Dept/Div/Institute: Gastroenterology

Administrative Contact: National Institutes

Direct Sponsor: National Institutes

Prime Sponsor: National Institutes

Current Total Project Period Commitment: \$653,588

Current Total Award Amount To Date: \$321,588

**Awarded Funding Proposals:**

ID	Name
FP00000214	Project Champions (Feb 2020) Jada Ramhofer

**Cumulative Award Totals**

This Award:	Proposed
Direct:	
Indirect:	



# Actions

**Actions:** Refer to the blue buttons found on the left and listed above activities on the workspace. They are based on security roles.

**Draft**

**Next Steps**

- Edit Award
- Printer Version

Team Disclosure Status

Terms And Conditions

Manage Ancillary Reviews

Set Award Relationships

Upload Award Documents

Manage Deliverables

Manage Relationships

Manage Tags

Create Agreement

Send Email

Manage Guest List

### Project Champions (Feb 2020) Jada Ramhofer

PD/PI: Rebecca Simms (

Specialist: Ava Lambert

Award Approver: Judy Jones (appr

Approving Dept/Div/Institute: Gastroenterology  
Administrative Contact: Carmen Alverado

Direct Sponsor: National Institutes  
Prime Sponsor:

Current Total Project Period Commitment: \$653,588  
Current Total Award Amount To Date: \$321,588

**Awarded Funding Proposals:**

ID	Name
FP00000214	Project Champions (Feb 2020) Jada Ramhofer

Totals	Funding Allocations	Deliverables	Subawards	Child Awards	Rel
--------	---------------------	--------------	-----------	--------------	-----

**Cumulative Award Totals**

This Award:		Proposed
-------------	--	----------

# State

**State:** Refers to the status of the record in the workflow. It gives you a clue about what to do next.

**Draft**

**Project Champions (Feb 2020) Jada Ramhofer**

State

PD/PI: Rebecca Simms

Specialist: Ava Lambert

Designated Reviewer:  
Award Approver: Judy Jones (app)

Approving Dept/Div/Institute:  
Administrative Contact: Gastroenterolog  
Carmen Alverad

Direct Sponsor: National Institute  
Prime Sponsor:

Current Total Project Period Commitment: \$653,588  
Current Total Award Amount To Date: \$321,588

**Awarded Funding Proposals:**

ID	Name
----	------

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# Navigate to Funding Award

# Grants Project Listing Page



Navigation menu with tabs: Dashboard, Agreements, Grants, SF424 Center. Sub-menu items: Funding Proposal, Complex Projects, Awards, Document Review, Reports, Help Center. The 'Grants' and 'Awards' tabs are highlighted with red boxes.

Awards in all stages

Sub-navigation tabs: Awards, Active Awards, Draft Awards, Subawards, Award Modifications.

Filter by ? ID   + Add Filter

ID	Name	SmartForm	State
IBIS00000056	Project Champions (Feb 2020) Jada Ramhofer	[Edit] ▼	Draft
IBIS00000055	Award Test MVM	[Edit] ▼	Draft
IBIS00000053	DEMO 5 JLV	[Edit] ▼	Draft
IBIS00000054	Non-Fed/Non-S2S Test Proposal KM 2.21.20	[Edit] ▼	Draft
AWD00000004	Demo Proposal 4 - JLV	[Edit] ▼	Draft
IBIS00000044	TEST 01/14/2020 - JLV	[Edit] ▼	Designated Review
AWD00000002	Demo Proposal 4 - JLV	[Edit] ▼	Active
IBIS00000042	Test Scenario 3 Nick Burry	[Edit] ▼	Draft
IBIS00000043	Test Scenario 2 for Veronica 2/6/20	[Edit] ▼	Draft
IBIS00000050	Test, WongV	[Edit] ▼	Withdrawn
IBIS00000049	Test_Burry	[Edit] ▼	Draft



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# Find Your Funding Award

# Find the Funding Award

## Awards

Awards							
Active Awards		Draft Awards		Subawards		Award Modifications	
Filter by <span>?</span> Name <input type="text" value="%MVM"/> <input type="button" value="Q"/> <input type="button" value="+ Add Filter"/> <input type="button" value="x Clear All"/>							
ID	Name	SmartForm	State	Reviewer	Award Approver	Date Modified	
IBIS00000056	Project Champions (Feb 2020) Jada Ramhofer	[Edit] ▾	Draft		Jones (approver1)	2/26/2020 6:25 PM	
IBIS00000055	Award Test MVM	[Edit] ▾	Draft		Jones (approver1)	2/26/2020 4:28 PM	
IBIS00000053	DEMO 5 JLV	[Edit] ▾	Draft		Jones (approver1)	2/26/2020 7:47 AM	
IBIS00000054	Non-Fed/Non-S2S Test Proposal KM 2.21.20	[Edit] ▾	Draft		Jones (approver1)	2/25/2020 2:44 PM	
AWD00000004	Demo Proposal 4 - JLV	[Edit] ▾	Draft		Jones (approver1)	2/19/2020 2:58 PM	
IBIS00000044	TEST 01/14/2020 - JLV	[Edit] ▾	Designated Review	Lambert	Jones (approver1)	2/19/2020 11:34 AM	
AWD00000002	Demo Proposal 4 - JLV	[Edit] ▾	Active		Jones (approver1)	2/19/2020 11:23 AM	
IBIS00000042	Test Scenario 3 Nick Burry	[Edit] ▾	Draft		Jones (approver1)	2/19/2020 10:31 AM	
IBIS00000043	Test Scenario 3 for Mervine 2/18/20	[Edit] ▾	Draft		Jones (approver1)	2/18/2020 5:49 PM	



# Edit Funding Award

Funding Proposal   Complex Projects   Awards   Document Review   Reports   Help Center

Help

Draft

IBIS00000052

Funding Award

## Test Proposal (MVM) NIH

### Next Steps

Edit Award

Printer Version

Team Disclosure Status

Terms And Conditions

Manage Ancillary Reviews

Set Award Relationships

Upload Award Documents

Manage Deliverables

Manage Relationships

Manage Tags

Create Agreement

Send Email

Manage Guest List

Log Private Comment

<b>PD/PI:</b>	Savita Pahwa	<b>Award Date:</b>	
<b>Specialist:</b>	Ava Lambert	<b>Start Date:</b>	1/1/2021
		<b>End Date:</b>	12/31/2024
<b>Designated Reviewer:</b>		<b>Award Type:</b>	Award
<b>Award Approver:</b>	Judy Jones (approver1)	<b>Award Structure:</b>	Standard
<b>Approving Dept/Div/Institute:</b>	Microbiology & Immunology	<b>Sponsor Award #:</b>	12345
<b>Administrative Contact:</b>	Carmen Alverado (coord)		
<b>Direct Sponsor:</b>	National Institutes of Health		
<b>Prime Sponsor:</b>			
<b>Current Total Project Period Commitment:</b>	\$0		
<b>Current Total Award Amount To Date:</b>	\$0		

### Awarded Funding Proposals:

ID	Name	Principal Investigator	Status
FP00000063	Test Proposal (MVM) NIH	Savita Pahwa	Pending Sponsor Review Award Anticipated

Totals	Funding Allocations	Deliverables	Subawards	Child Awards	Related Projects	Reviewers	Correspondence	History	...
<b>Cumulative Award Totals</b>									
<b>This Award:</b>									
<b>Direct:</b>					\$852,000		\$0		0



# Workspace

Use the Edit Award button to edit the Funding Award *SmartForm*



**Draft**

Next Steps

- Edit Award**
- Printer Version

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- Team Disclosure Status
- Terms And Conditions
- Manage Ancillary Reviews
- Set Award Relationships
- Upload Award Documents
- Manage Deliverables

## Demo Proposal 4 - JLV

PD/PI:

Specialist:

Designated Reviewer:  
Award Approver:

Approving Dept/Div/Institute:  
Administrative Contact:

Direct Sponsor:  
Prime Sponsor:

Current Total Project Period Commitment:  
Current Total Award Amount To Date:

**Awarded Funding Proposals:**

ID	Name
FP00000009	Demo Proposal 4 - JLV



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# SmartForm

# SmartForm

- The *SmartForm* is a series of pages you complete with information about the record
  - **General Award Information**
  - *Budget Reconciliation*
  - *Personnel Effort*
  - *Deliverables*
  - *Compliance Review*

The screenshot shows the IBISResearch SmartForm interface. The header includes the IBISResearch logo and navigation options like 'Validate' and 'Compare'. The breadcrumb trail indicates the user is editing 'Demo Proposal 4 - JLV' with ID 'AWD00000004'. A sidebar on the left lists various sections: General Award Information (highlighted), Related Items, Financial Setup, Budget Allocations, Budget Reconciliation, Personnel Effort, Terms And Conditions, Deliverables, Compliance Review, and Completed Award. The main content area is titled 'General Award Information' and contains five required fields:

- 1. \* Short title of award:** A text input field containing 'Demo Proposal 4 - JLV'.
- 2. \* Long title of award:** A text area containing 'Demo Proposal 1 - JLV (Testing compare feature)'.
- 3. \* Principal investigator:** A dropdown menu showing 'Rebecca Simms (pi)' with a search icon.
- 4. Award type:** A dropdown menu showing 'Award'.
- 5. \* Select instrument type:** A radio button selection with options: Grant (selected), Contract, Cooperative Agreement, and Subaward. A 'Clear' link is also present.

# Send Email to Specialist

Once you review the award and complete the designated SmartForm pages, send an Email to the Specialist using the Send Email activity.



**Draft**

**Next Steps**

Edit Award

Printer Version

Team Disclosure Status

Terms And Conditions

Manage Ancillary Reviews

Set Award Relationships

Upload Award Documents

Manage Deliverables

Manage Relationships

Manage Tags

Create Agreement

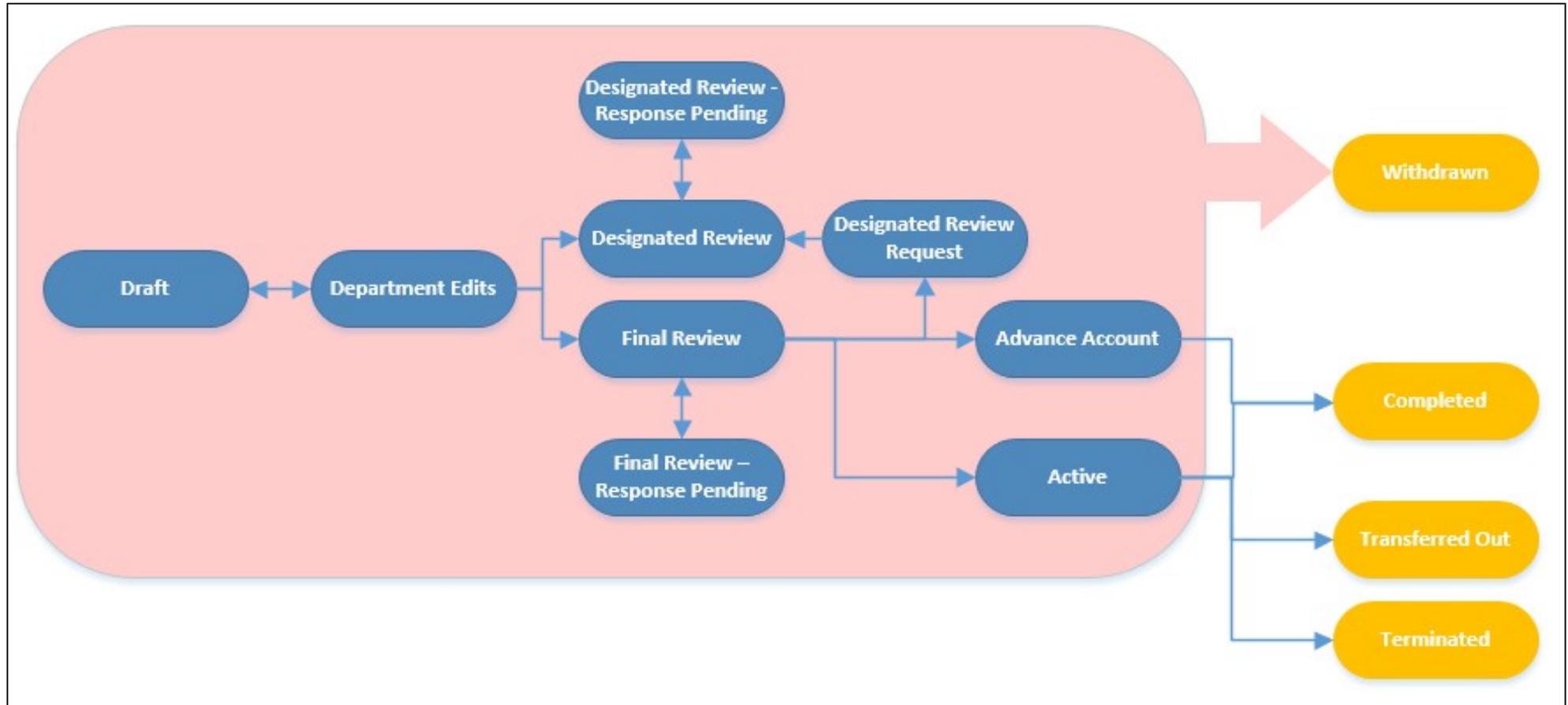
**Send Email**

Manage Guest List

Log Private Comment

Log Comment

# Award Workflow by State





# Follow on Proposals (Continuation, Renewal, Revision and Resubmission)

# Create Continuation

- You must have an active Award to Create a Continuation
- This action is available from the Funding Award Workspace

The screenshot displays a user interface for an active award. At the top, a yellow bar indicates the award status is 'Active'. Below this, a 'Next Steps' section contains several buttons: 'View Award', 'Printer Version', 'Request Award Modification', and 'Create Continuation'. The 'Create Continuation' button is highlighted with a red rectangular border. To the right of the buttons, a dark blue bar shows the award ID 'IBIS00000038' and the label 'Funding Award'. Below the 'Next Steps' section is a list of actions, each with a small icon: 'Team Disclosure Status', 'Terms And Conditions', 'Set Award Relationships', 'Upload Award Documents', 'Manage Deliverables', 'Manage Relationships', 'Manage Tags', 'Create Agreement', 'Send Email', 'Manage Guest List', and 'Log Private Comment'.

# Renewal and Revision

- You must have an active Award to Create a Renewal or Revision
- Those actions are available from the Funding Proposal Workspace

**Awarded**

**Next Steps**

- View Funding Proposal
- Printer Version
- Create Document Review
- Create Renewal**

Team Disclosure Status

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

**Create Revision**

Send Email

Manage Guest List

Add Comment

FP00000119 Funding Proposal



# Follow-On Submissions

Awarded

## Test Proposal (MVM) NIH

FP00000063

Funding Proposal

Follow-on in progress

### Next Steps

View Funding Proposal

Printer Version

Create Document Review

Create Renewal

Create Funding Award

Team Disclosure Status

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

Send Email

Assign Specialist

Add Comment

### Proposal Information

PD/PI:	Savita Pahwa
Department:	Microbiology & Immunology
Specialist:	Ava Lambert
Sponsors:	National Institutes of Health
Internal Submission Deadline:	2/20/2020
SF424 Link:	SF-42400000021

### Budget Information

Starting Date:	1/1/2021
Number of Periods:	4
Total Direct:	\$852,000
Total Indirect:	\$354,302
Total:	\$1,206,302

### Funding Awards

ID	Name	State	Recipient	Sponsor	Start Date	End Date
IBIS00000052	Test Proposal (MVM) NIH	Active	Microbiology & Immunology	National Institutes of Health	1/1/2021	12/31/2024

1 items      < page 1 of 1 >      10 / page

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Follow-on Submissions	Related Projects	...
---------	---------------	---------	-----------	-------------	------------	----------------	-----------------------	------------------	-----

### Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
Cost Sharing for National Institutes of Health	[Edit]	2/17/2020 2:18 PM	Active	Institution (Internal)	\$88,444	no
National Institutes of Health	[Edit]	2/17/2020 2:18 PM	Active	Federal	\$1,206,302	yes



# Resubmission

- You must have a Funding Proposal in the State of Not Funded or Withdrawn to create a Resubmission
- Those actions are available from the Funding Proposal Workspace

Not Funded

## Next Steps

View Funding Proposal

Printer Version

Create Document Review

Team Disclosure Status

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

Create Resubmission

Send Email

Manage Guest List

FP00000135

Funding Proposal

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# Request Award Modification

# Award Modification Requests

- Revision/Supplement
- Rebudget
- Continuation
- Carryover
- NGA Revised
- Budget Allocation Correction
- Early Termination
- Demographic Changes (Change of Key Personnel)

# Request an Award Modification

- You must have an active Award to Request an Award Modification
- This action is available from the Funding Award Workspace

Active

Next Steps

View Award

Printer Version

Request Award Modification

Create Continuation

Team Disclosure Status

Terms And Conditions

Set Award Relationships

Upload Award Documents

Manage Deliverables

Manage Relationships

Manage Tags

Create Agreement

Send Email

Manage Guest List

Log Private Comment

IBIS00000038 Funding Award

# Request an Award Modification

**IBIS**Research

Creating New Award Change Request

Request Details

**Draft**

Edit Modification Request

Printer Version

→ Submit to Specialist

← Withdraw

Copy

Assign Submitter

Log Comment

## Carryover Request- MVM 2.20.20

**Submitted By:** Rebecca Simms (pi)

**Specialist:** Ava Lambert

History Attachments

**4. Supporting documents:**

+ Add

Name
There are no items to display

**5. Specialist:**  
Ava Lambert

# Submit to Specialist Activity

Draft

Edit Modification Request

Printer Version

→ Submit to Specialist

← Withdraw

📄 Copy

👤 Assign Submitter

💬 Log Comment

## Carryover Request- MVM 2.20.20

**Submitted By:** Rebecca Simms (pi)

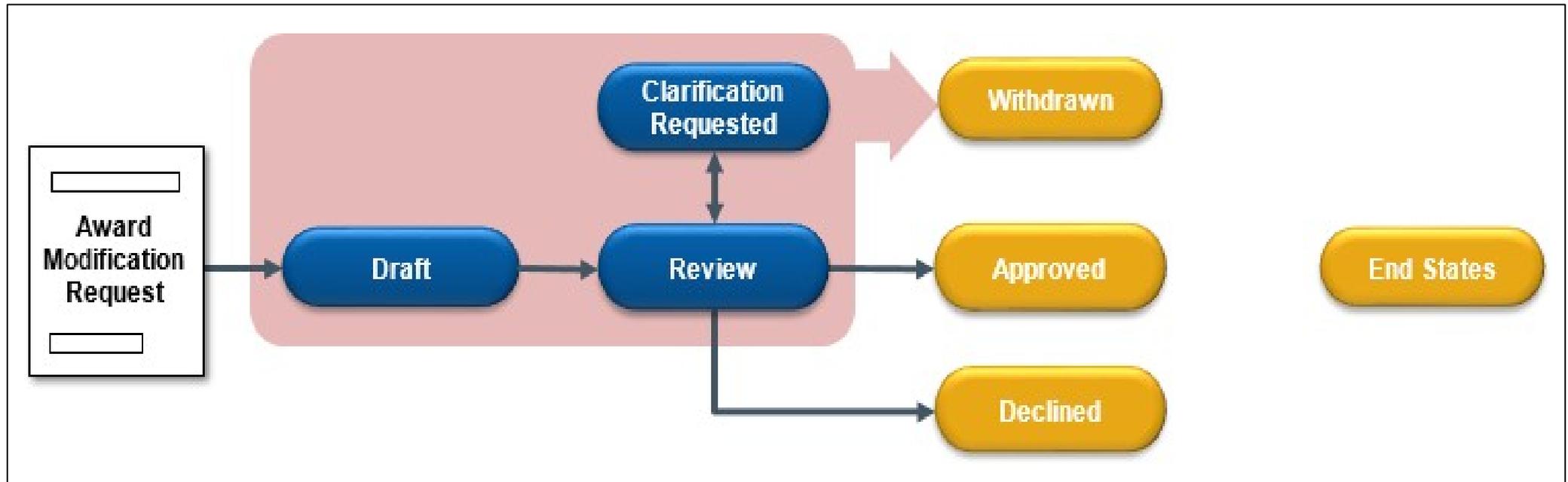
**Specialist:** Ava Lambert

History

Attachments

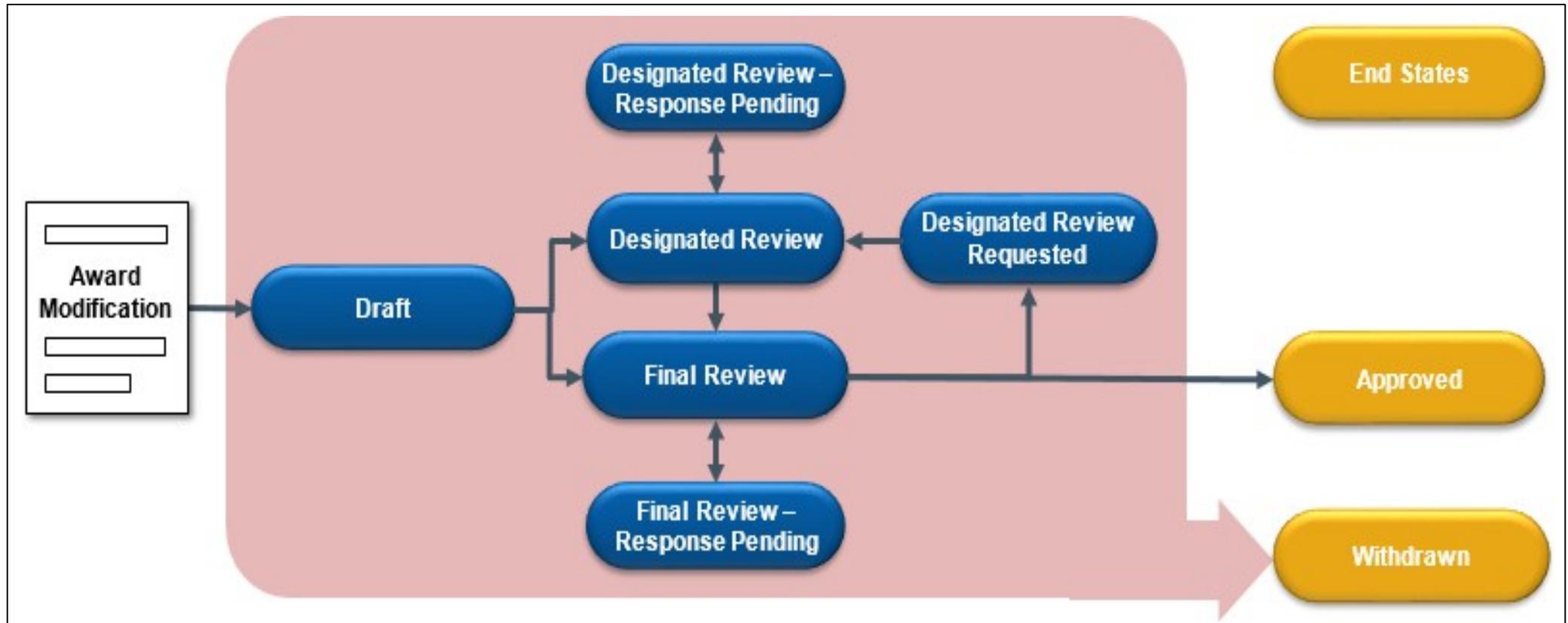
# Award Modification Request by State

## PI/Study Staff



# Award Modification by State

## Specialist (ORA)



# Funding Award Workspace

Active

## Next Steps

View Award

Printer Version

Request Award Modification

You do not have sufficient privileges to create Projects with this Project Creator Component.

Terms And Conditions

Complete

Set Award Relationships

Upload Award Documents

Manage Deliverables

Manage Relationships

Create Agreement

Send Email

Manage Guest List

Assign Specialist

Assign Award Approver

Assign Designated Reviewer

Log Private Comment

## UQUEST

AWD-005061

Funding Award

PD/PI:	Patrice Saab	Award Date:	5/7/2019
Specialist:	Ava Lambert	Start Date:	5/15/2019
		End Date:	4/30/2024
Designated Reviewer:		Award Type:	
Award Approver:	Judy Jones (approver1)	Award Structure:	Standard
Approving Dept/Div/Institute:	Psychology	Sponsor Award #:	R25GM129812
Administrative Contact:	Jennifer Lopez		
Direct Sponsor:	National Institute of General Medical Sciences (NIGMS)		
Prime Sponsor:			
Current Total Project Period Commitment:	\$272,000		
Current Total Award Amount To Date:	\$272,000		

### Awarded Funding Proposals:

ID	Name	Principal Investigator	Status
89369	UQUEST	Patrice Saab	Awarded

Modifications	Totals	Funding Allocations	Deliverables	Subawards	Child Awards	Related Projects	Reviewers	Correspondence	History	...
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### Modification Requests

Name	SmartForm	Execute Activity	Date Modified	State	Submitter	Specialist
Demo Changes - Personnel KW 2.20.2020	[Form] ▾	Execute Activity... ▾	2/20/2020 11:43 AM	Approved	Ava Lambert	Ava Lambert

### Modifications

ID	Name	SmartForm	Date Created	Date Modified	State	Mod Type	Sponsor Approval State
AWD-005061-MOD001	Demo Changes - Personnel KW 2.20.2020	[Forms] ▾	2/20/2020 11:45 AM	2/28/2020 9:49 AM	Approved	Demographic Changes Only	Received Sponsor Response



# Understanding Email Notifications

- Many activities and state transitions within the workflows trigger email notification
  - Proposals, awards, award modifications, and subawards
- Email notifications will only be sent to University of Miami email addresses



# Award Email Notifications

Trigger	Sent To
Manage Ancillary Reviews	Assigned Ancillary Reviewers
Send Email activity	Recipients selected in activity window
30 Day Reminder	Deliverables owner responsible party, and any other staff selected to receive notifications
60 day Reminder	Deliverables owner responsible party, and any other staff selected to receive notifications
Activate activity (When Award is activated)	Assign Specialist, PI, Administrative Contact
Activate activity (When Award has an Advance Account)	Assign Specialist, PI, Administrative Contact
Assign Award Approver activity	Award Approver
State transition from "Draft" to "Department edit"	Award Editors, Assigned Specialist
Request Changes from Specialist activity (In Designated Review state)	Assigned Specialist

# Award Email Notifications (cont.)

Trigger	Sent To
Request Changes from Specialist activity (In Final Review state)	Assigned specialist
Submit for Final Review activity	Award Approver
Request Designated Review activity	Assigned specialist
Submit Changes activity (resubmitted for review)	Assigned Reviewer
Submit Changes activity (re-assigned award for final review)	Assigned Award Approver
Assign Designated Reviewer activity	Designated Review
Assign Specialist activity	Newly assigned Specialist
Submit for Designated Review activity	Designated Reviewer
Withdraw activity	PI, Assigned Specialist, Assigned Award Approver

# Award Modification Request Email Notifications

Trigger	Sent To
Approve activity	Submitter of the award modification request
Request Clarifications activity	Submitter of the award modification request
Submit Clarifications activity	Assigned Specialist
Decline activity	Submitter of the award modification request
Assign Specialist activity	Assigned Specialist
Submit to Specialist activity	Assigned Specialist
Assign Submitter activity	Submitter of the award modification request
Withdraw	Assigned Specialist

# Award Modification Email Notifications

Trigger	Sent To
Manage Ancillary Reviews activity	Assigned ancillary reviewers
Approve activity	PI, Assigned Specialist, Administrative Contact
Assign Award Approver activity	Assign Award Approver
Request Changes activity (initiated by Designated Reviewer)	Assigned Specialist
Request Changes activity (instated by Award Approver)	Assigned Specialist
Request Designated Review activity	Assigned Specialist
Submit Changes activity (for designated review)	Assigned Designated Reviewer
Submit Changes activity (for final review)	Assigned Award Approver

# Award Modification Email Notifications

Trigger	Sent To
Assigned Designated Reviewer activity	Assigned Designated Reviewer
Send Email activity	Recipients selected in activity window
Assign Specialist activity	Assigned Specialist
Submit for Designated Review activity	Assigned Designated Reviewer
Submit for Final Review activity	Assigned Award Approver
Withdraw activity	PI, Assigned Award Approver, Assigned Specialist

# Subaward Email Notifications

Trigger	Sent To
Send Fully Executed Notification	Recipients selected on the Personnel page of the Subaward SmartForm

# Help Desk

- Phone: 305-284-9733
- Email: [ORA-SI@miami.edu](mailto:ORA-SI@miami.edu)



# Sign up for Training



Home Learning My Team Reports ILT Admin Admin

Hello, Maria. What Do You Want to Learn Today?

ibis



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# Hands-On Activities

- Complete the Award Smart Form
- Send an Email to the Specialist
- Create a Continuation from an Active Award
- Copy a Funding Proposal
- Request an Award Modification
- Create a Revision
- Create an Agreement from a Funding Proposal

# Questions and Answers



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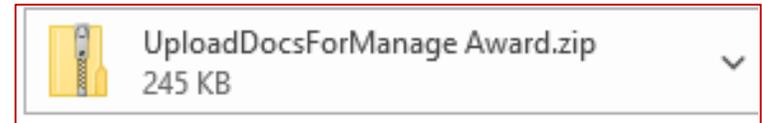


# Hands-On

*Embrace*  
YOUR  
*Journey*

# Handouts

- The link to the Huron website will be provided in the chat box after the 1<sup>st</sup> exercise demonstration.
- Download the uploadDocs to your desktop
- Download the Manage Awards-TrainingExercises.pdf to your desktop



# Complete the Award SmartForm

1. General Award Information
2. Budget Reconciliation
3. Personnel Effort
4. Deliverables
5. Compliance Review

**IBIS**Research

Validate Compare

You Are Here: Demo Proposal 4 - JLV

Editing: AWD00000004

### General Award Information

- \* Short title of award:**  
Demo Proposal 4 - JLV
- \* Long title of award:**  
Demo Proposal 1 - JLV (Testing compare feature)
- \* Principal investigator:**  
Rebecca Simms (pi)
- Award type:**  
Award
- \* Select instrument type:**  
 Grant  
 Contract