Instructions: Use the following steps to route post award documents.

Post Award scenarios may include:

- Change in PI
- When a PI changes departments
- Addition/deletion of or change in key personnel
- Change in key personnel effort
- Addition to or change in research certifications approval
- Change in scope of work
- Progress report involving significant change in scope of work where incremental funding is contingent upon progress report submittal
- De-obligations
- Change in allocation of indirect costs
- Rebudget, if it will result in a formal award modification
- Change in conflict of interest disclosure
- Addition of consortium
- Change in performance site

Steps unique to creating a proposal development document for the purposes of routing post award documents

1. Be sure to select Post Award Action as the Proposal Type

2. Do not create a budget version within myGRANT, but instead make sure to attach all relevant sponsor or award documents as internal attachments

Special Instructions:
Supplemental Funding Awards Not Previously Proposed

If your post award modification is for supplemental funding awards not previously proposed,

1. Create a new proposal development document
2. Create a budget for the amount of the supplemental award
3. Attach formal and informal communication with the sponsor in the internal attachments subtab within the Abstract and Attachments tab
Requests for no-cost extensions do not require creation of a myGRANT Proposal Development document.

1. Send the original and one copy of the formal request letter to your designated ORS Pre-Award Specialist with transmittal instructions.
2. When ORS receives approval from the funding agency, a copy of the award notice will be forwarded to the principal investigator and fiscal officer via myGRANT.

**Copying a Proposal in myGRANT**

1. Open the original proposal submitted in myGRANT
2. Select the Proposal Actions tab
3. Open the Copy to New Document menu
4. Leave Budget and Attachments unchecked
5. Select Lead Unit
6. Select Copy Proposal

**Creating a New Proposal Development Document in myGRANT**

1. Select Create Proposal
A new Proposal Development Document is created.

2. Take note of the Doc Nbr to search for entry in the future.

3. The Status will show as In Progress.

4. The Initiator is the person who created the document.

Complete all the fields labeled with an asterisk “*”:

5. Add Description of the action being taken on the document.

6. Select the Post Award Action from the Proposal Type.

7. Select the Lead Unit.

8. Select the Activity Type.

9. Enter name of Project Title.

10. Enter the Sponsor Code. (If you are unsure of the sponsor code, click on the magnifying glass next to the blank field.)

Continue routing post award documents…
11. Enter the **Sponsor Name** or **Acronym** to further define your search

12. Click **Search**

A list of sponsors will display according to your search criteria

13. Find the correct sponsor

14. Click on **Return Value** and the system will populate the sponsor code field

15. Enter the Project **Start Date**

16. Enter the Project **End Date**

17. Select **Show** to open the **Organization/Location** menu
In the Organization/Location menu:

18. Select the magnifying glass to search for the Primary Performance Site.

The Primary Performance Site is the primary location where the project research will take place.

19. Enter the Address or Building Name to further define your search.

20. Select Search.

21. The search results will display.

22. Click on Return Value and the system will populate the Primary Performance field.
23. Select **Save**

24. Select the **Key Personnel** tab

The Key Personnel tab allows you to enter individuals who are integral to the proposed project and who make a significant contribution to the scientific development or execution of the project.

25. Select the magnifying glass to search for an employee

Note: The PI role must be filled prior to the submission of the proposal.
Continue routing post award documents...

26. Search for the employee

27. Select **Return Value** to choose the appropriate person

28. Select the **Proposed Role**

29. Select **Add Person**

**Combined Credit Split:**

The Combined Credit Split is used to enter the contributions of the PI and co-investigators

30. Insert the appropriate values
   (Note: All values must add up to 100)
31. Complete the 5 sections for each key person as needed
   - Person Details
   - Extended Details
   - Degrees
   - Unit Details
   - Certify

   Note: The Certify section is required for the PI and co-investigators

32. Select Save

33. Select the Custom Data tab

   The Custom Data tab lists certain policies or provisions that a proposal may be subject to such as ARRA, Minority Serving Institute or RCR.

34. Select Yes(Y) or No(N) for each of the items listed

35. Select Save
Quick Reference Guide: Routing Post Award Documents

36. Select **Abstracts and Attachments** tab
   
   The Abstract and Attachments tab allows you to attach relevant sponsor or award related documents.

37. Open the **Internal Attachments** section

38. Select **Internal Attachment** from the **Attachment Type** drop down menu

39. Type a description of the document

40. Browse and select the file to upload

41. Select **Add**

42. Select **Questions** tab
   
   Depending upon the question responses, you may need to:
   
   - Add an explanation
   - Add an entry in the Special Review section
   - Add an attachment

43. Add an explanation if appropriate

44. Select **Save**

Continue routing post award documents...
45. Leave the budget version tab blank
46. Select Proposal Action tab
47. Turn on Validation to check your document for errors
48. Open the Route Log section to view the routing process to see pending approvals
49. Be sure to review the Future Actions Requests before submitting the proposal
50. Once you have corrected all validation errors and verified future routing, select Submit