Grants Information Entry Template

Prepared by:	
Date Prepared:	

** *Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.*

Part 1. Create Proposal and Budget: *Navigation: FSCM>>Grants>>Proposals>>Maintain Proposal>>Add a New Value tab*

Step I	**Proposal Tab in Edison**		
1	Proposal ID # (15 is limit- *no spaces*)[1]		
2	Description (20 is limit)[2]		
3	Reference Award Number/FAIN & Edison Interdept. Supplier Contract ID[3]		
4	Title (30 is limit)[4]		
5	PI ID[5] /PI Name (Type in Last name)[A.]		
6	Sponsor ID/Sponsor Name[B.]		
7	CFDA[E.]		
8	Start Date[6]		
9	End Date[7]		
10	No. Periods	Always only one (1)	
Step II	**Establish "Location" from Hyperlink in Edison, becomes Location Tab**		
1	Location (choose generic 0000000000 - Tennessee) set up for each project		
Step III	**Projects Tab in Edison (only one project should be checked as a Primary Project & Primary Project should have Primary Location checked)**		
1	Project ID (15 limit & begins with 2 alpha BU[C]) *(no spaces)*[8]		
2	Project Title (20)-enter desired description of Project		
3	Department - 5 digit[9. & F.]		
4	Subdivision - 10 digit department[10. & F.]		
5	Institution = To agency (should default in)[11. & G.]		
6	Department Credit - 10 digit one (100%)[12]		
7	F&A Rate Department - 10 digit one[13]		
Step IV	**Budget Tab>>Budget Header in Edison**		
1	Budget ID becomes Activity (funding source)[14]		
2	Budget ID Description[15]		
3	Activity Type[16]		
5	Save Proposal (when you have saved proposal in Edison, mark "X" in box)		
4	F&A and Pricing Setup (if applicable, specific to agency)[17]	Rate Type[I.]:	FA Base[J.]: Funded Rate[I]:
Step V	**Save and then Budget Tab>>Budget Period box "1"hyperlink in Edison**		

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BUDGET[D]	Account	Sponsor Direct (Billing Limit)[18]						Cost Share[19]	
		Federal	Interfed	Intermatch	Interlocal	Foundation	Nongov	State	ProgramInc
LABOR_SALARY	70100								
FRINGE	70200								
TRAVEL	70300								
PRINTING	70400								
UTILITIES	70500								
COMMUNICATION	70600								
MAINT_REPAIR	70700								
PROF_SRVC_3RD_P	70800								
SUPPLIES	70900								
RENT_N_INSUR	71000								
VEHICLE	71100								
AWARD_INDEMN	71200								
GRANTS	71300								
EQUIPMENT	71600								
LAND	71700								
BUILDING	71800								
CONST_NON_BLDG	72000								
TRAINING	72100								
DATA_PROCESSING	72200								
PROF_SRVC_STATE	72500								
F&A_COSTS (automatic in creation of budget)	89040								
Total Budget		-	-	-	-	-	-	-	-

Step VI	**Submit Proposal**	**1st REVIEW**	**Generate (1st Review done before Generate Proposal to Award)**
	***** Navigation: FSCM>>Grants>>Proposals>>Submit Proposal***		***** Navigation: FSCM>>Grants>>Proposals>>Generate Award***
1	Change/Review the submit status from "Not submitted" to "Submitted" and save.		Review all previously entered information before clicking "Generate"

Part 2. Add "Attributes"

***** FSCM>>Grants>>Awards>>Award Profile>>Award tab>>Go To: Attributes***

1 Check below "Attributes for SEFA/SIS Reporting .

Check	Attribute Type	Attributes Description
☐	C	Cash
☐	F	Federal Government
☐	N	Other than Cash
☐	R	Research
☐	T	Pass Through

2 Go to "Attachments" hyperlink and add attachment such as grant agreement/notice of award.

Part 3. Make Adjustments to Project ***** FSCM>>Grants>>Awards>>Project***

1 Make Project Type[20.& H.] "Grant" or Other (Agency specific). See "Info. 1-18" tab.

Part 4. Finalize Project Budget ***** FSCM>>Grants>>Awards>>Project Budgets***

1 Check begin and end date.

2 Check Cost Share Direct amounts and Sponsor Budget amounts, then "Finalize".

3 Click on the Process Monitor hyperlink to view run status in order to check errors.

Part 5. Check/Change Rate Set in Customer Contracts

*****FSCM>>Customer Contracts>>Create and Amend>>General Information***

1. Click billing plans hyperlink>>click B101 hyperlink

In the Billing Default Overrides: Invoice Form "GM_GEN" and Bill By ID "GM_CASH"&Save

2. Go back to General Information tab>>Lines tab>>Detail tab>>click "Contract Terms"

Change Effective Date to grant start date, check Rate Set from below.

Check	Rate Set	Description	Effective Date
☐	68001	Federal Revenue	
☐	68002	Federal Capital Grants	
☐	68030	Counties	
☐	68050	Cities	
☐	68060	Nongovernmental	
☐	68070	Other State	
☐	68080	Current Services	
☐	68090	Interdepartmental	
☐	68095	Interdepartmental CU	
☐	STAT	Statistical or Agency Specific	

3. Change Contract Status to "Active" in General Information tab & Save.[21] Final Review

Checklist for Creating a Customer (Revenue) Contract in Edison
Proposal Method

Reviewer Checklist Completed by:	
Date Checklist Completed:	
Business Unit:	
Grant Edison Proposal ID:	
Direction:	***Part 1 of this checklist should be completed before the Proposal has been generated. Part 2 to Part 5 of this checklist should be completed after the Proposal has been generated.***

		Reviewer Check
Part 1. Create Proposal and Budget		
*** Navigation: FSCM>>Grants>>Proposals>>Maintain Proposal>>Find an Existing Value tab>>Type in Information from Grant Entry Info. Template*		
Step I.	Review Proposal Header Page, on the **Proposal Tab** for the following:	
1	Is Proposal ID (15 limit alpha/numeric characters/no spaces) entered correctly? - can't change later	☐
2	Does the Description (20 limit alpha/numeric characters) make sense and within the 20 character limit?	☐
3	Is the Reference Award Number (if primary agency, this number and FAIN the same; if secondary agency this is Supplier Contract #) entered correctly?	☐
3	Is the Federal Award Identification Number (if secondary agency, this number if primary agency's Federal Award number) entered correctly?	☐
4	Does the Title (30 limit alpha/numeric characters) make sense and within the 30 character limit?	☐
5	Is the PI ID entered correctly?	☐
6	Does the Sponsor ID entered match the Sponsor on the Grant Agreement/Notice of Award? - can't change later	☐
7	Is the CFDA number the same as the CFDA on the Grant Agreement/Notice of Award?	☐
8	Is the Start Date the same as the begin date on the Grant Agreement/Notice of Award?	☐
9	Is the End Date the same as the end date on Grant Agreement/Notice of Award or no more than 90 days after the end date on the Grant Agreement?	☐
Step II.	Review "Location" on the **Location Tab**.	☐
1	Are all Locations "0000000000"? Is only one checked as Primary?	☐
Step III.	Review the Project(s) information on the **Projects Tab** for the following:	
1	Is the Project ID (first 2 alpha, 15 alpha/numeric characters) correctly entered?-can't change after "save"	☐
2	Is only one Project checked as "Primary"?	☐
3	Is the Project ID Title (less than 30 alpha/numeric characters) correctly entered?	☐
4	Is the Department "5 digit" entered correctly?	☐
5	Is the Subdivision "10 digit" entered correctly?	☐
6	Is the Institution ID entered correctly?	☐
7	Is the Department "10 digit" entered correctly under the Department Credit hyperlink?	☐
8	Is the F&A(Indirect Cost) Distribution Department "10 digit" entered correctly?	☐
Step IV.	Review the Budget Headers/Activity(s) on the **Budgets Tab** for Each Project ID	
1	Is the Budget ID(Activity) entered correctly? Compare to the funding in Grant Agreement.	☐
2	Is the Budget ID Description "_______(Federal/Interfed/Intermatch) Funding Source" entered correctly?	☐
3	Is the Activity type entered correctly for each project?	☐
4	If the grant allows for F&A cost, is the F&A(IDC) rate (Federally Approved Rate) set-up correctly? Check Rate Type, FA Base, Funded Rate.	☐
Step V.	Review Project Budget to ensure the Billing Limit and Budget Items match the Grant Agreement	
1	Is the total amount shown as "Sponsor Direct" correct? Does total amount match the funded amount in Grant Agreement?	☐
2	Do the Budget Items agree with the Grant Agreement budget?	☐
3	Is the "Cost Share" for state activity (if applicable) correctly designated? Check the Cost share percent equals "100", Department (5 digit), C/S Pct equals "100", C/S Direct "$"(auto filled))	☐
4	Is the Institution Cost Share total amount correct?- if it is State Activity	☐
Step VI.	Submit Proposal ** Navigation: FSCM>>Grants>>Proposals>>Submit Proposal	
1	Is the Proposal in the "Submitted" status?	☐
	GENERATE PROPOSAL	
NOTE:	***The below review procedures should be performed after the Proposal has been generated and the Customer (Revenue) Contract has been created.***	☐
Part 2. Update Award Profile		
*** FSCM>>Grants>>Awards>>Award Profile>>Award tab>>Go To: Attributes*		
1	Are the "Attributes for SEFA/SIS Reporting "F," "T," "R," and/or "C" correct?	☐
2	Have the proper attachments been uploaded? (Notice of Award, grant agreement, supplier contract, etc.)	☐
Part 3. Make Adjustments to Project		
*** Navigation: FSCM>>Grants>>Awards>>Project>>General Information Tab*		
1	Is the Project Type selected as "Grant" or Other (Agency Specific)?	☐
Part 4. Finalize Project Budget		
*** Navigation: FSCM>>Grants>>Awards>>Project Budgets*		
1	Are the Start and End dates correct?	☐
2	Are the Cost Share Direct amounts and Sponsor Budget amounts correct?	☐
3	"Finalize" and check for no errors in Message Log.	☐
Part 5. Customer (Revenue) Contract Adjustments and Activation		
*** Navigation: FSCM>>Customer Contracts>>Create and Amend>>General Information*		
1	Click Billing Plans hyperlink>>click B101 hyperlink: Review the Billing Default Overrides; Invoice Form: "GM_GEN" and Bill By ID: "GM_CASH"	☐
2	Go back to General Information tab>>Lines tab>Detail tab>click "Contract Terms" hyperlink	☐
	Review billing limit and revenue limit (same), Effective Date (usually grant start date); Check Rate Set and effective dates.	☐
3	Is Contract (Revenue) Contract status changed from Pending to Active?	☐