Document Title: Grants Department Contacts Maintenance – Job Aid

Original date: Date Revised: August 31, 2022 Next Revision/Review Date: August 31, 2023

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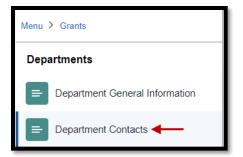
The Sponsored Programs Administration office (SPA) has requested a custom Notification Report to be generated from the PS Grants Module in order to enhance the communication to the Research community and campus departments on pertinent Award Information like Award Setup, Contract Amendments, Award Terms & Conditions, Budget details and other important status updates relevant to the Grant/Contract during the life of the Award.

The Grant Voucher or Notification Report is generated by the SPA Research Award Accountant (RAA) or any member within the SPA office, when it is deemed necessary to inform the Award PI and the Award Department Contacts (mentioned in detail below) on Award Data that either has been newly setup or modified.

This Job Aid is intended for the Department Financial Administrators, Financial Managers, Administrative Coordinators to maintain a list of Grant Voucher Report Recipients/Department Financial Contacts, as determined and maintained by the Department Financial Manager or Department Administrator.

Please note that, by default, the Award PI will always be notified and therefore should not be added as a Grant Department Contact.

The Department contacts are maintained by the respective research department Financial Manager/Administrator/Coordinator, within the PS Financials Grants module pages: Main Menu > PeopleSoft Financials > Grants > Departments > Contacts



The Department Contacts are setup based on the Grants' Project Department ID.

The first step is to identify the Department ID which has been associated for your Grant and then navigate to **Main Menu > PeopleSoft Financials > Grants > Departments > Contacts**

Any individual who actively manages the Sponsored Research for a department can request the PS Security Role of **UT D GM Department Contacts** via a ServiceNow Request to the PS Security Team and having this PS Role will grant you access to view/edit and add department contacts to the Grants > Departments > Contacts page.

In order for the Grants Notification Report to be received by the Financial Administrators and their intended internal departmental staff (Business Analysts, Admins etc.), the Financial Manager has to add users to <u>each of the Department IDs</u> for which they have Grants associated to.

Addition of Department Contacts:

epartment Contacts SetID	SHARE	Department 41001	11	Description	AN-Pediatric Ar	nesthesiology	
epartment Contacts As Of				QI	 1 of 1 	▶ ►	I View
*Effective Date	06/01/2022	earch for the Empli	D and add as	*Status	Active	~	+ -
Contact Details		epartment Contact		Q (4	◀ 1-3 of 3 ∨		View 1
*Empl ID	113552 Q	Taylor,Robyn Dena					+ -
Job Code	9228 Q	MGR FINA AFF					
*Location	CS02618 Q	Sprague Clinical Scier	ice Bida				
Email	CAMP Q	Sprague Chinical Scien	ice blug				
		Robyn.Taylor@UTSO	UTHWESTERN.EDU				
Approval Authority	Th	is section can	be left bla	nk			
C	Unlimited Threshold	d	с	urrency	۹		
C	Clegally Bind Institut	tion	Threshold	Amount]		
Phone			Official				
III Q	∢ ∢ [1-	-1 of 1 ✔ ► ► I View All	E Q	M	▲ 1-1 of 1		▶ ew All
*Type Phone			Туре				
۹		+ -			~	+	-
					the Add butt		d more
*Empl ID	171627 Q	Mills,Tamara Dee		Depar	tment Conta	acts 🔶	+ -
Job Code	4362 Q	MGR RESCH PRGMS					
*Location	HP03310C Q						
	CAMP Q	Professional Office Bu	nung I				

After all the Contacts are added, click

and exit.

Grant Notification Report

Notification Reason: Award Activation/Award Amendment/Terms and Conditions Change

AWARD INFORMATION:
Award PI:
Award Title:
Award ID:
Ref. Award Number:
Sponsor Name:
CFDA #:
Project Start Date:
Project End Date:
Pay Method:
Award Status:

Total Project Amount: Sum of Award Modification Amount from Award Profile page Total Current Budget Amount (To-Date): Total Posted Budget (Sum of all Posted Project Budgets)

AMENDMENTS

Amendment	Туре	Reason	Process Date	Status	Notes

Certifications:

Certification Code	Certification Date	Project Id	Approval Date	Expire Dt	IRB/IACUC #	Exemption #
						EXEMPTION_NBR

Additional Information:

Туре	Comments	Primary Sponsor	Prime Spnsr Ref Award No.	Allow Pre Awd Spending	Guaranteed Source Funding
		If Flow Thru – Primary Sponsor ID, Name	Prime Sponsor Ref Awd #		If Advance Account, Departmental SL for Guaranteed Source of Funding

Project Details:

Project ID:	
Project Description:	
Department ID:	
Department Name:	
Project PI:	
Project Period:	
Project Team:	

Terms & Conditions

Term ID	Description	Explanation

Project Activity Details:

Project Activity: Start Date: End Date: OAS ACCT #:

F&A Details: Effective Date: Rate:

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UT Southwestern Medical Center

Grant Notification Report

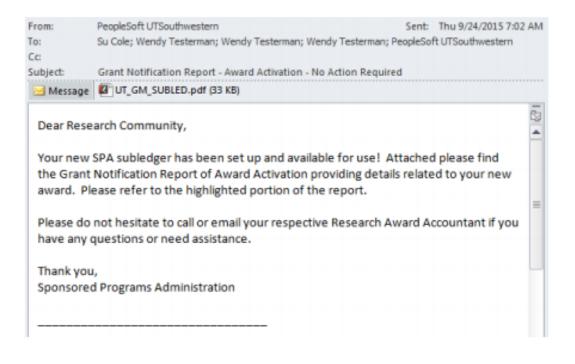
Notification Reason: Award Activation/Award Amendment/Terms and Conditions Change

Activity Budg	et Details: BUDGETS	5 OVERVIEW	PAGE							
Subledger	Account	Dept	Fund	Project	Act	Budget	Expense	Enc	Pre_Enc	Avail Bud
	Total									

Base:

Future Budget Period & Funding for Project XXXXXXXX

Period	Start Date	End Date	Funded Amt	To Proj ID	Status



UTSouthwestern

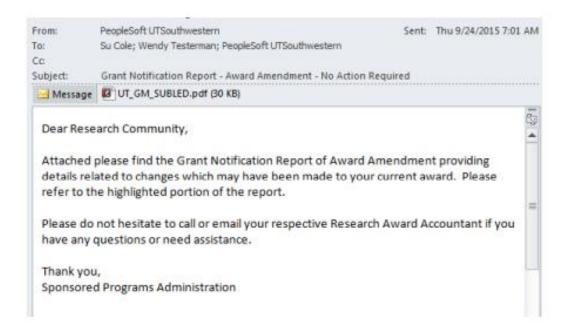
Medical Center

Grant Notification Report

Notification Reason: *** Please consider this document as an official notice of Award Activation, Subledger Creation and Budget Setup. ***

Award Information:

Award Pt: Award Tibe: Award Tibe: Ref. Award Number: Sponsor Name: CFDA #: Project Start Date: Project End Date: Pay Method: Award Status: Ross,Elliott Morton G Protein-Coupled Receptors-Structure and Regulation OPA0006120 5R01GM030355-33 NIH-NATIONAL INST OF GENERL MED SCIENCES 93.859 - Biomedical Research and Resear 01/01/2012 12/31/2015 LOC ACTIVE





Medical Center

Grant Notification Report

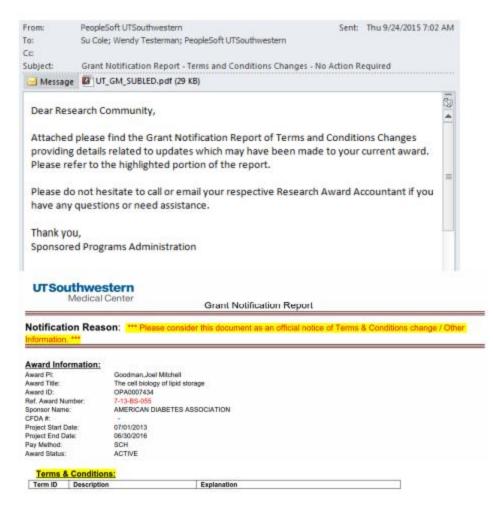
Notification Reason: *** Please consider this document as an official notice of Award Amendment. ***

Award Information:

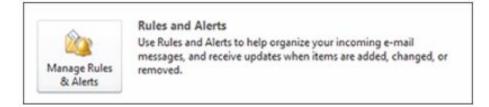
Award PI:	Mangelsdorf,David John
Award Title:	Development of Nuclear Receptors - Admin Core
Award ID:	OPA0006709
Ref. Award Number:	RP120732-AC
Sponsor Name:	CANCER PREVENTION & RESEARCH INST OF TX
CFDA #:	4
Project Start Date:	09/01/2012
Project End Date:	08/31/2017
Pay Method:	CRB
Award Status:	ACTIVE

Amendments:

Amendment	Туре	Reason	Process Date	Status	Notes
onsososos	Contract Activation		35/2-02012	Complete	
+000000000	Ownge Date	Amendment	-35/05/2013	Complete	Cale Charge
oponeopond -	Equipment .	Acialisi Tana and Paral	0968/2013	Complete	Belup year 2 pre-award per Cherry Assimum nursal states 8-21-13.
0000000000	Charge Itale	Aramainant	GN05/2014	Complete	Cale Charge
oponstonnes -	Bunchair	Added Town and Purel	20/08/2014	Cargoria	



1. Click File | Info tab, and then the Manage Rules & Alerts button.



2. Click New Rule ... on the Email Rules tab. The Rules Wizard dialog will pop up

E-mail Rules	Manage Alerts			
Apply chang	es to this folder:	Inbox [Randhawa,A]		
Au	la Change Bui	ie + 🗈 Copy 🗙 Delete 🛛 🔺 🤘	Run Rules Now Options	
New Ru	e Unange Ru	e. Tobàm V Beere	Paulanes unum Obnais	

3. In the area marked **Step 1: Select a template**, choose the template that most closely resembles the action you would like to take. Ensure you select a template from the **Stay Organized** or **Stay Up to Date** sections

Start from a template or from a blank rule	
Step 1: Select a template	
Stay Organized	
Move messages from someone to a folder	_
Move messages with specific words in the subject to a folder	
Move messages sent to a public group to a folder	
Y Flag messages from someone for follow-up	
Move Microsoft InfoPath forms of a specific type to a folder	
Move RSS items from a specific RSS Feed to a folder	
Stay Up to Date	
Normal Section Section Section 2018 Section 2018 Provide Alert Window 🐕	
🕘 Play a sound when I get messages from someone	
Send an alert to my mobile device when I get messages from someone	
Start from a blank rule	- 1
Apply rule on messages I receive	
Apply rule on messages I send	
	_
Step 2: Edit the rule description (click an underlined value)	
Apply this rule after the message arrives	
with <u>specific words</u> in the subject	
move it to the <u>specified</u> folder and stop processing more rules	
and stop processing more rates	- 1
Example: Move mail with Project in the subject to my Project folde	er
Cancel < Back Next > Fin	ich
Cancel < back ivext > Fin	isn

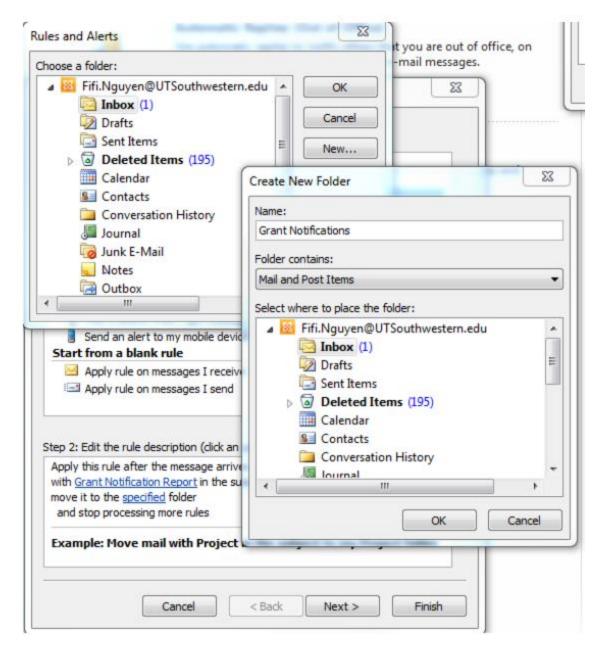
Rules Wizard

4. In the area marked Step 2: Edit the rule description, click on the underlined text specific words. A "Search Text" pop up will appear; type in "Grant Notification Report". Then click the "Add" and "OK" button.

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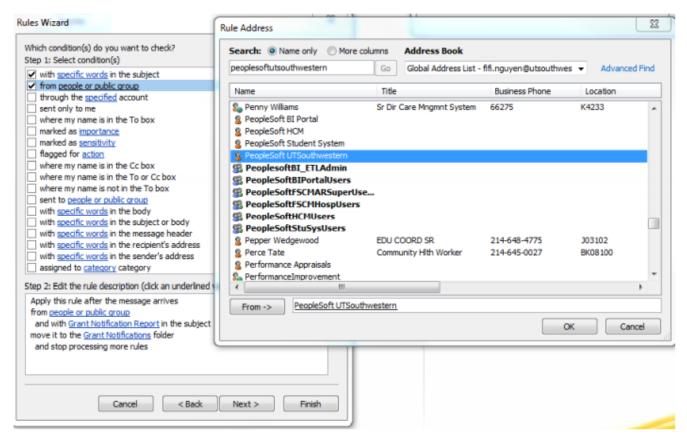
Start from a template or from a blank rule Step 1: Select a template	
Stay Organized	
earch Text	Σ
Specify words or phrases to search for in the subject:	
Grant Notification Report	Add
Search list:	
	23
"Grant Notification Report"	Remove
"Grant Notification Report"	OK Cancel
Step 2: Edit the rule description (dick an underlined value Apply this rule after the message arrives	OK Cancel
Step 2: Edit the rule description (dick an underlined value	OK Cancel

4. Select any additional criteria you would like to set Step 2: Edit the rule description by clicking on the specified folder and adding in your criteria. Click on Inbox then on the right-hand side, click on New... to create a new folder for the emails to go.



6. Click OK, and then click NEXT.

7. Specify the conditions for those criteria in the Step 2: Edit the rule description box by placing a tick mark from people or public group. Once ticked, this will include a line in Step 2: Edit the rule description box. Click on the people or public group and locate PeoplesoftUTSouthwestern in the Global Address Book. Click OK.



8. Click on Next

Rules Wizard	23
What do you want to do with the message? Step 1: Select action(s)	
 stop processing more rules move it to the specified folder assign it to the category category delete it permanently delete it move a copy to the specified folder forward it to people or public group forward it to people or public group have server reply using a specific message 	
 reply using a specific template reply using a specific template flag message for follow up at this time clear the Message Flag clear message's categories mark it as importance print it play a sound start application 	-
Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from PeopleSoft UTSouthwestern and with Grant Notification Report in the subject move it to the Grant Notifications folder and stop processing more rules Cancel < Back	nish

9. Click on Next

10. Select any exceptions to the rule and specify the details for those criteria in the Step 2: Edit the rule description box (optional)

	Ru	es	W	iza	rd
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except if from people or public group	
except if the subject contains specific words	
except through the specified account	
except if sent only to me	
except where my name is in the To box	
except if it is marked as importance	=
except if it is marked as sensitivity	-
except if it is flagged for action	
except where my name is in the Cc box	
except if my name is in the To or Cc box	
except where my name is not in the To box	
except if sent to people or public group	
except if the body contains specific words	
except if the subject or body contains specific words	
except if the message header contains specific words	
except with specific words in the recipient's address	
except with specific words in the sender's address	
except if assigned to category category	*
p 2: Edit the rule description (dick an underlined value)	
pply this rule after the message arrives	
om PeopleSoft UTSouthwestern	
and with Grant Notification Report in the subject	
ove it to the Grant Notifications folder	
and stop processing more rules	
and stop processing more rules	

13. Click on Next

14. Type a name for the rule in the box for Step 1: Specify a name for this rule

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Rules Wizard	23
Finish rule setup.	
Step 1: Specify a name for this rule	
PeopleSoft UTSouthwestern	
Step 2: Setup rule options	
Run this rule now on messages already in "Inbox"	
Turn on this rule	
Create this rule on all accounts	
Step 3: Review rule description (click an underlined value to edit)	
Apply this rule after the message arrives from PeopleSoft UTSouthwestern	
and with Grant Notification Report in the subject	
move it to the <u>Grant Notifications</u> folder and stop processing more rules	
Cancel < Back Next >	Finish

15. Tick the box next to Run this rule now... if you want to apply the rule to messages already received

- 16. Review the settings you have selected in Step 3: Review rule description.
- 17. When you are certain of the details of the rule and want to commit to it, click Finish.
- 18. Your rule will now appear listed, with a description of the settings, in the Rules and Alerts dialog box

E-mail Rules	Manage Alerts			
Apply chang		Inbox [fifi.nguyen@utsouth	nwestern.edu]	•
			e 🗎 🗢 🔻 <u>R</u> un Rules Now <u>O</u> ptio	Ins
	pplied in the orde	-	Actions	*
	Soft UTSouthwest		1	*
Rule descrip	tion (click an unde	erlined value to edit):		Ŧ
Apply this	rule after the me	ssage arrives		-
Apply this i	rule after the mes leSoft UTSouthwe	ssage arrives		* III
Apply this from Peopl and with	rule after the mes leSoft UTSouthwe	ssage arrives estern <u>1 Report</u> in the subject		* H +
Apply this in from Peopl and with move it to	rule after the mes leSoft UTSouthwe Grant Notification the <u>Grant Notifica</u>	ssage arrives estern <u>1 Report</u> in the subject	ds	* III *

Version Control

8-31-22:

• Updated screen shots and PeopleSoft naming conventions consistent with most recent PeopleSoft system updates.