This document is intended for the Central Office- Award Setup Team (AST), Departments and Reviewers.

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Award Notification Received

Once the Central Office (GS) confirms Award Notification Received for a project, the Central Office Award Setup Team (AST) would initiate the New Funding Award process.

New Funding Award (AST)

1. Under Current State click **New Funding Award**.
   
   **Note:** Executing this activity will route you to the pre-populated Award smart forms and generate a new Award Number.

2. Complete all of the “Central Office” required Award smart forms. Click **Continue** to move through the pages.
   
   **Note:** There will be pages that the Central Office AST will be required to complete while the Department has “View Only” access.

3. Once the forms are completed, on the final page click **Finish**.

4. The State of the Award will change to **Draft**.
If the project involves any type of compliance, budget, sub awards or conflict of interest related items, it will need to be sent to the department for reconciliation before the account is set up:

1. Under Activities, click **Forward to Department for Reconciliation** and select the desired options from the reconciliation checklist.
2. Add comments.
3. Click OK.
4. The project will be routed back to the Department and the State of the Award will change to **Departmental Reconciliation**.

5. Click the **Edit Award** activity.
6. Complete the “Department” required Award smart forms and click **continue** to move through the forms.
7. Once all other reconciliation requests have been addressed, go back to the award workspace and execute the **Department Approves Reconciliation** activity.
8. Add comments.
9. Click OK.
10. The project will be routed back to the state of **Central Office Review (AST)**.
11. If there is a sub-award involved, the department should also email the sub-award specialist informing him/her of this during this time.
Submit for Review (AST)

If the project requires additional compliance or legal review, it would be routed to the appropriate individuals within that department for review. However, execution of this activity/process need only be performed if applicable.

1. To initiate compliance review, execute the Submit for Review activity and click Add to include reviewers.
2. If multiple reviewers are required click OK and Add Another, otherwise click OK.
3. Once all reviewers have been identified, add comments.
4. Click OK.
5. The project will be routed to the Reviewers and the State of the Award will change to Pending Compliance Review.

Submit Review (Reviewers)

Once under compliance review, review the necessary documents for congruency.

6. Upon completion of compliance review, execute the Submit Review activity.
7. If approved, select “Yes” and add any relevant comments.
8. Click OK.
9. The state of the Award will change to Central Office Review.

Note: If the submission was not approved, the award would be routed back to the Central Office for further review/changes.

Note: To see the Reviewers listed, or to check the status go to the Contacts and Reviewers tab.
Pending Account Setup

Pending Account Setup occurs once the award smart forms have been completed, all reviews and approvals have been accomplished (if applicable), and the award is ready to be activated. By noon of each business day, all awards in this state will be transmitted to the DGCA Oracle Cloud. By the next business day, the primary project (account) number will have been established in the cloud and will be available for retrieval by the AST to complete the award set up.

1a. If the Department Reconciliation and Review process is executed and completed, from the state of Central Office Review, execute Pending Account Setup.

1b. If the New Funding Award activity is executed and no further review is required, from the state of Draft execute Pending Account Setup.

2. Include the required Oracle Cloud Award and Primary Project numbers.

3. Add comments.

4. Click Ok.

5. The State of the project will change to Pending Account Setup.

   Note: Once an Award has reached the state of Pending Account Setup, no further changes should be made.

6. If additional changes are required, execute the Return to Central Office Review activity.

   Note: This will stop the Award setup process, and will prevent it from being included in the nightly oracle transmit.

7. Make the necessary changes and re-execute the Pending Account Setup activity.

   Note: Once an award reaches the state of Pending Account Setup, the next and final step would be to activate the award.
Activate/Activate-Restrictions

Once the Oracle Cloud Award and Primary Project Numbers are received, the Central Office (AST) can choose to either activate the award or activate the award with restrictions (if applicable).

Activate Award (AST)

1. To activate the award, click the **Activate** activity.
2. Review the Award information.
3. Add comments
4. Click OK.
5. The State of the project will change to **Active**.

**Note:** Executing this activity will activate the award for the associated project. The AST would then grant ownership back to the GS.

Activate - Restrictions (AST)

6. To activate the award with restrictions click the **Activate Restrictions** activity.
7. Enter the **Primary Account Number** for the Award.
8. Select the restrictions to be placed on the award.
9. Add all applicable comments for the restriction.
10. Click OK.
11. The state of the project will change to **Active-Restrictions**.

**Note:** This activity will setup the award with a restricted account. The award may be granted full active status once the requirements have been met. The AST would then grant ownership back to the GS.