

RAMP - Research Administration Management Portal

How to Set Up a New Award

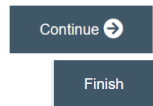
Security Role(s): Study Staff


The RSP Award Acceptance & Set-up team is responsible for creating the award record and completing certain pages of the Award SmartForm. When RSP has completed the initial steps of the award setup process, they will send the Award SmartForm to units for unit completion. Awards will be in the Unit Review and Setup state when they transition to the unit from RSP. Units will then complete the Award SmartForm and return the form to RSP to complete the setup process.

NOTE: RAMP only allows whole dollar amounts for awards. RSP will make a note of all incoming award that are awarded in dollars and cents so that they are set up with the actual awarded amount in PeopleSoft. When allocating budget or inputting awards that include dollars and cents, round down to the nearest dollar. Unit staff should follow the steps below to complete the Award SmartForm and return the form to RSP to complete the setup process:

Preliminary Steps

1. On the Award Workspace, select the Edit Award button.
2. Complete the Award SmartForm pages using the instructions below. The sections below provide directions for how to complete each of the pages. Press Continue at the bottom of each page to navigate through the SmartForm pages (the final page has a Finish button instead of a Continue button).
3. When the Award SmartForm has been completed, select Finish, and navigate to the Award Workspace.
4. From the Award Workspace, select the Return to RSP activity and include any relevant notes or comments when executing the activity.
5. RSP will complete the award setup process and activate the award or follow-up with the unit staff with questions (follow-up may include sending the Award SmartForm back to the unit for edits).



TIP: Select the **Help icons**  throughout the Award SmartForm for additional information on how to answer the questions.

Section #1: General Award Information Page

RSP completes many elements on this page and certain sections of the page are automatically populated from the funding proposal record. Unit reviewers should review the information entered by RSP and complete any additional fields as instructed below.

1. Short title of award – automatically populated from proposal record.



2. Long Title of Award - automatically populated from proposal record.
3. Principal Investigator - automatically populated from proposal record.
4. Award Type – no data entry required.
5. Select instrument type – automatically populated from proposal record. RSP will update if necessary.
6. Direct sponsor – automatically populated from proposal record.
7. Direct sponsor’s award ID – This is the number entered in the Award Letter Received activity.
8. Prime Sponsor – if applicable, automatically populated from proposal record.
9. Prime sponsor’s award ID – if applicable, enter this value from the Notice of Award.
10. Assistance Listing Number– if applicable, RSP will enter/verify this number.
11. Document # (required if NIH) – RSP will enter the document number (letter of credit number) from the NIH Notice of Award.
12. FAIN – if applicable, RSP will enter the Federal Award Identification Number.
13. Sponsor award date – this is the date entered in the Award Letter Received activity and is the date the sponsor approved the award. RSP will enter this information.
14. Owning Department - automatically populated from proposal record.
15. Administrative Contact - automatically populated from proposal record.
16. Award state date – RSP will enter the award dates. confirm these dates are correct.
17. Award end date – RSP will enter the award dates. confirm these dates are correct.
18. Official award documents – includes the Notice of Award that was uploaded in the Award Letter Received activity.
19. Other award documents – attach any other relevant award documents. The Notice of Award is attached in the prior question and does not need to be reattached here.
20. Select team members who have edit rights – the personnel are imported from the proposal record. RSP will not update this information – update as necessary to provide edit access to the award record.
21. Select team members who have read-only rights – the personnel are imported from the proposal record. RSP will not update this information – update as necessary to provide read access to the award record.

Section #2: Related Items Page

This page is for identifying funding proposals related to the award and automatically displays the proposal from which the award was created.

If additional proposals are related to this award, add them here.

Section #3: Financial Setup Page

This page allows you to specify the financial accounts (PeopleSoft (SFS) Projects) that will be used for award setup. A default financial account is automatically created, and additional financial accounts should be created if needed to manage the award.

NOTE: This page is equivalent to the Projects tab in WISPER, and you should follow the current UW-business processes for determining the number of PeopleSoft projects to establish/set up.

To ease data entry if you need additional projects, complete the data entry for the default project as outlined below and then select the **Copy** button to create the additional projects (update the copies as appropriate). Select the “**X**” button to remove project rows that are not needed.

Follow the steps below to update the default financial account:

1. Select the **Update** button to open the Edit Financial Account slide-in window and complete the fields as described below.
 - a. Project Name – enter the name of the financial account (project). This name is sent to PeopleSoft when the project is established.
 - b. Account Description and Information – optional field that is sent to PeopleSoft. This field is used to help disambiguate awards that have multiple projects or include project summary information in PeopleSoft.
 - c. Project Start Date – start date for the period in which expenditures are allowed for this specific project.
 - d. End Date – end date for the period in which expenditures are allowed for this specific project.
 - e. Project PI – prepopulates to the award PI but can be changed if the project has a different PI.
 - f. Project Department – this pre-populates to the award owning department but can be changed if a different department is responsible for the project.
 - g. Indirect cost base type – this pre-populates from the funding proposal and should not be changed unless the award uses a different base than the funding proposal or if a specific project requires a different indirect cost base.
 - h. Active – this field defaults to True to allow allocations to reference this financial account. Leave value as True.
- NOTE:** Inactive accounts are not available for selection in new allocations.
- i. **Project ID** – this remains blank and will be populated when RSP sends the award to PeopleSoft during the activation process.
 - j. **UW Project Type** – enter the appropriate project type from the selection list. Reference the [awards user guide appendix](#) for additional information.
 - k. **Facilities Admin Rate Type** – enter the appropriate facilities and admin rate type from the selection list. Reference the [awards user guide appendix](#) for additional information.



- l. **Fund Code** – enter the fund code from the drop-down list. Reference the [awards user guide appendix](#) for additional information.
 - m. **Program Code** – enter the appropriate program code(s) from the selection list (this selector allows for more than one selection). Reference the [awards user guide appendix](#) for additional information.
 - n. **Ruleset** – enter the ruleset from the drop-down list. Reference the [awards user guide appendix](#) for additional information.
 - o. **Combo Edits** – enter additional units that need access to this project. Other units that will need to spend on this project in PeopleSoft should be listed here.
 - p. **Is this financial account for an outgoing subaward** – enter Yes or No as appropriate.
2. When complete, select **OK** to return to the Financial Setup page.
 3. You can add additional projects as needed on the Financial Setup page. Additional projects can be added in two ways:
 - a. Select the **+Add** button and complete the data entry for new projects as described above.
 - b. Select the **Copy** button for existing project rows, and then select the **Update** button to update the copy with the appropriate information.

Section#4: Budget Allocations Page

This page is for capturing details about the award periods authorized in the Notice of Award and matching those periods (or allocations) to a project (we established the project(s) on the prior SmartForm page). In simple terms, this page matches awarded funds with the appropriate project. RAMP automatically creates budget allocations corresponding to the budget periods defined in the

funding proposal record, but we can make updates to this page if there was a notable change from the funding proposal (e.g., the sponsor cut a year of funding).

Follow the steps below to update a budget allocation:

1. Select the name of the budget allocation to update to open the Edit Budget Allocation slide-in window and complete the fields as described below. Start with the first allocation listed on the page.
 - a. Financial account – Select the appropriate financial account (project) from the drop-down list.
 - b. Period number – This number defaults to the associated budget period.
 - c. Name – Enter the name of the budget allocation. This name is not sent to PeopleSoft and is for informational purposes only.
 - d. Description – Optional field. This name is not sent to PeopleSoft and is for informational purposes only.
 - e. Issue date – By default, this reflects the date supplied for the Sponsor award date on the General Award Information page.
 - f. Funding proposal for budget import – Lists all proposals listed on the Related Items page. If more than one proposal is listed, select the proposal whose budget data is to be used for this allocation.

- g. Direct sponsor award ID – Populated with the award ID entered on the General Award Information page.
- h. Period start date – Populated from the funding proposal record, update as necessary to reflect the terms of the award.
- i. Period end date – Populated from the funding proposal record, update as necessary to reflect the terms of the award.
- j. Authorized – Select the authorization type. For awards being set up in response to a notice of award (vs. an advance account), at least one period should be Authorized by Sponsor.
 - i. For periods authorized in the notice of award, select Authorized by Sponsor.
 - ii. For periods not authorized in the notice of award, select Not Authorized.
 - iii. For Advance Account Requests, select Advance Account.
- k. Does this allocation include cost share? – leave as No. UW-Madison will not use RAMP to establish PeopleSoft projects to track cost share expenditures.
- l. Direct, Indirect, and Total – Enter the Direct and Indirect cost dollar amounts for this allocation. Total is a calculated field.

NOTE: The total awarded amount displayed on the Budget Reconciliation page and on the Award Workspace is the sum of all authorized and advance account allocations.

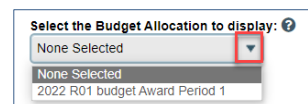
- m. **Indirect rate (%)** – automatically populated from the funding proposal record. Update if needed according to UW-Madison business processes.
2. When complete, select OK to return to the Budget Allocations page.
 3. From the Budget Allocations page, open the remaining budget allocations and update using the above steps.
 - a. For budget allocations that have not been awarded, leave the Authorization Type as **Not Authorized**.
 - b. For budget allocations that have not been awarded, update the period dates and anticipated award (direct and indirect costs) as appropriate based on the notice of award.

Section #5: Budget Reconciliation Page

This page allows you to reconcile (or distribute) all authorized funds into the appropriate PeopleSoft budget categories in accordance with the notice of award.

Budgets can be reconciled by either importing the funding proposal budget or by manually entering the budget by category. Follow the direction below to reconcile the award budget:

1. In the Select the Budget Allocation to display field, select the allocation that you want to reconcile from the drop-down list (only authorized or advance account allocations will appear for selection in this list).
2. The PeopleSoft budget categories will appear on the page after selecting the allocation.



NOTE: RAMP displays all PeopleSoft budget categories. If you selected the training ruleset on the Financial Setup page, only use the categories with the “TRAIN” prefix. If you selected a categorical ruleset on the Financial Setup page, use the categories without the “TRAIN” prefix.

- To import the funding proposal budget, select the **Import (\$)** button to select the **appropriate budget period** and then select **OK** to import the budget. The imported budget now shows in the Baseline column.
- Importing the budget will update the Current Allocation section of the page and display the Difference (or variance) – this difference represents the variance between the imported proposal budget and the current allocation. The Difference is the amount we need to adjust to reconcile the budget.

Import (\$)

Select the budget period(s) you want to import:

Budget: 2022 R01 budget

Period 1 (7/1/2023-6/30/2024)

Period 2 (7/1/2024-6/30/2025)

Period 3 (7/1/2025-6/30/2026)

Period 4 (7/1/2026-6/30/2027)

Period 5 (7/1/2027-6/30/2028)

Current Allocation		
Total Sponsor Awarded:	Total Allocations	\$202,150
Total Reconciled:	Proposal Budget Total	\$240,411
Difference:	Adjustment Needed	-\$38,261

Award / Authorized Budget Reconciliation

All Allocations

Total Sponsor Awarded to Date: \$202,150

Total Reconciled to Date: \$202,150

Difference: \$0

Current Allocation

Total Sponsor Awarded: \$202,150

Total Reconciled: \$202,150

Difference: \$0

Select the Budget Allocation to display: 2022 R01 budget Award Period 1

Undo All Changes

Use the Adjustment Column until the Difference is \$0

Start Date: 7/1/2023 End Date: 6/30/2024

Budget Categories	Baseline					Active Allocation Total
ZSALRY - Salaries-prjbud	SALARY	\$0	↑	-\$12,000		\$77,799
ZFRING - Fringes-prjbud	FRINGE	\$31,160	↑	-\$3,605		\$27,555

- Use the Adjustments Column to add adjustments to the Baseline with the goal of achieving a \$0 difference. If the allocation already corresponds to the imported proposal budget, there may be no data entry required on this page. If you end up with a (+/-) \$1 difference due to rounding, use the “FA_ROUNDING” category to adjust the \$1 difference in the appropriate direction to achieve a \$0 difference.

TIP: Select the **Undo All Changes** button Undo All Changes to remove the Adjustments and start the reconciliation process over.

TIP: Select the **Clear** button Clear to remove the imported proposal budget (proposal budgets can be re-imported using the Import button).

- If not using the imported proposal budget, directly enter the budget into the Adjustment fields in the appropriate category until the difference is \$0. Use the “FA_ROUNDING” budget category to manage rounding, if necessary, as described above.

Section #6: Personnel Page

This page automatically populates with all UW-Madison personnel listed on the associated funding proposal record(s). If the personnel have changed at the time of award, update this page to reflect the current personnel.

Section #7: Effort Page

Commitments are recognized, and effort must be tracked for the principal investigator/project director and key personnel listed in the Notice of Award.

The Effort SmartForm page automatically populates with effort from the funding proposal budget(s) and includes effort for all individuals and allocation periods.

If personnel were not entered in the funding proposal budget and this section is blank, **at a minimum** enter effort for the principal investigator(s)/project director(s) and key personnel who are listed in the Notice of Award. Update all allocation periods as appropriate.

If the key personnel have changed at the time of award, update this page to reflect the current key personnel. Changes made after award set up, are not made in RAMP, but rather through the Effort Commitment Update Form on the RSP website (contact the RSP Effort Coordinator for assistance).

The Effort page shows effort details for the first budget period by default, and the other periods are collapsed. Select the plus icon (+) at the far left to expand a period and the minus icon (-) to collapse a period.

Enter effort in Calendar, Academic, or Summer Months for each budget allocation period at a minimum for anyone who is listed and identified in the Notice of Award as having these roles: PI, Co-PI, Key Personnel. Effort should be entered to match the Notice of Award, or if not listed in the NOA, effort should be entered based on the sponsor approved budget/proposal.

Enter the effort committed for each budget period in the “Months Effort” column. Enter the months requested in salary for each budget period in the “Months Requested” column.

- Name: National Institutes of Health Award Period 1 Financial Account: Enhanced Liver Transduction Period: 1 Start Date: 3/1/2023 End Date: 2/29/2024														
Person	TBD	Role	Role Other	Start Date	End Date	Use Split Appointment	Cal. Months Effort	Cal. Months Req	Acad. Months Effort	Acad. Months Req	Sum. Months Effort	Sum. Months Req	Cost Share Months	Remove Row
Rebecca Simms (pi)		PD/PI		3/1/2023	2/29/2024	<input checked="" type="checkbox"/>			9	9	3	3		X
Alex Adesina		Faculty		3/1/2023	2/29/2024	<input type="checkbox"/>	12	12						X
Mary Brown		Technician		3/1/2023	2/29/2024	<input checked="" type="checkbox"/>			9	9	3	3		X
<input type="text"/>	<input type="checkbox"/>	None		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>								

+ Name: National Institutes of Health Award Period 2 Financial Account: Period: 2 Start Date: 3/1/2024 End Date: 2/28/2025													
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Cost share is captured when the “Months Effort” are higher than “Months Requested” for a Person in a Budget Period. When the effort person months does not equal the requested months, “Cost Share Months” column will auto-populate.

Enter a zero “0” in the Months Requested column to indicate that effort in a budget period is being cost-shared.



For example, in the figure below, person 1 has .95 academic months of effort, no months of salary are requested from the sponsor, so all are cost shared. Person 2 has 2 months calendar year effort, one month is requested (sponsor paid), so the remaining month is cost shared.

Start Date	End Date	Distribute Effort	Cal. Months Effort	Cal. Months Req	Acad. Months Effort	Acad. Months Req	Sum. Months Effort	Sum. Months Req	Cost Share Months
9/1/2022	8/31/2023	<input checked="" type="checkbox"/>			0.95	0	0	0	0.95
9/1/2022	8/31/2023	<input type="checkbox"/>	2	1					1

NOTE: Funding proposal budgets will reflect personnel effort using person months and the budget convention used on the funding proposal budget is carried over to the Effort Page.

NOTE: Award modification effort SmartForm pages will list effort in percentages if the award record was originally set up in WISPER. These awards have record numbers that begin with MSN. Award modification effort SmartForm pages will list effort in months if the award was originally set up in RAMP. These awards will have record numbers that begin with AWD.

Section #8: Terms and Conditions Page

This page records the Terms and Conditions for the award and will be completed by RSP. For awards with sponsors that have templated terms in RAMP, this page will be pre-populated. RSP will edit as appropriate.

Section #9: Key Personnel Page

This page records the Key Personnel listed on the notice of award. Update the personnel as needed to correspond to the award notice.

Section #10: Deliverables Page

This is an optional page that can be used to record and manage non-financial deliverables. RSP does not use this page to manage deliverables, but units may want to use this page for their purposes. Deliverables display on the Award Workspace and can be updated and managed from the Award Workspace when the award is not in an editable state. Follow the directions in the Deliverables section of the [awards user guide](#) to add deliverables during the award setup process. Alternatively, deliverables can be created and managed at any time during the award period.

Section #11: Compliance Review Page

This page automatically populates with the compliance questions and associated answers from the funding proposal page. Update this page as needed if any compliance or protocol changes have occurred since the time of proposal.

NOTE: For related IRB, IACUC, Biosafety, or SCRO protocols, you must first add the funding proposal to the application in [ARROW](#) for it to display in RAMP. More information is provided in the [How to Answer Compliance Questions & Associate ARROW Protocols](#) job aid.



Section #12: Completed Award Page

This page provides general guidance on what to do after you have completed the SmartForm. Review the instructions and select **Finish** when complete. You are returned to the Award Workspace. Selecting Finish does not return the award to RSP. Reference the directions at the beginning of this tip sheet to complete the award setup process.