

Award Status Enquiry

Responsibility: GM Grants Administrator & GM Grants Investigator
Navigate: Award Status

Award Status can be used to view summary details of an award and a breakdown of the award by each project being funded. Both expenditure and billing data can be viewed. The data in the screen view is updated during the day and is not dependent on any overnight processing. Expenditures that have failed funds checking or have been entered and saved but not approved are not included in the screen view.

Viewing a Single Award

1. Enter the award number, including the prefix of **RG** or **G** and click on the **Find** button.

If you don't know the award number, the project code can usually be entered in the short name field, and then click on the Find button.

2. The award status screen shows a one line summary of the award. Further information is available from the buttons at the bottom of the screen.

| Award | Award Name | Revenue | Budget | Actual Cost | Commitment Amount | Total Cost | Available Balance | % Complete |
|----------|------------|------------|--------------|--------------|-------------------|--------------|-------------------|------------|
| RG 12345 | ZZA G123 | 585,004.88 | 1,951,375.64 | 1,557,221.88 | 9,352.38 | 1,566,574.26 | 384,801.38 | 80 |

Buttons: Resource Status, Actuals, Commitments, Project Status, Award Inquiry, Invoice Review

3. To view the details of the award click on the **Award Inquiry** button.
4. Use the row of tabs to display more information about the award and sponsor.

- To view the award VAT status and whether a Starting Certificate is required click on the flex-field to the right of the screen (as above screen shot).

VAT Types

| Name | SOF last letter | Where the VAT is coded to |
|---------------|-----------------|---|
| Exempt | B | Coded to the grant to be passed on to the sponsor |
| Outside Scope | B | |
| Standard 20% | A | Coded to the University VAT account to be reclaimed from HMRC |
| Zero Rate | A | |
| ECF7 | C | Charged to the department as an expense as it can neither be reclaimed from HMRC nor the sponsor. |

- Click **OK** to close the flex-field and return to the main Award Management screen.

AWARD MANAGEMENT

VAT Status: **Outside Scope**
 DRR Indicator: **DRR 0** Standard 66/34%
 Starting Certificate Req'd: **N** No
 Date Certificate Sent:
 FX Policy/Currency: **OLD** Pre FX Policy
 Currency Rate:
 Total award currency budget:
 Key Responsibility 1: **CAPSA RGCS GRANTS ENQUIRY**
 Key Responsibility 2: **CAPSA RGCS Grants Administrator**
 Key Responsibility 3: **CAPSA RGCS Grants Superuser**
 Key Responsibility 4: **CAPSA ZZ: GM ACCOUNTS OFFICE**
 Key Responsibility 5: **CAPSA ZZ: GM GRANTS ADMINISTRATOR**

- To view the type of billing applicable to the award, click on the arrow box to display more tab options and select **Compliances**.

Installments | Terms and Conditions | Budgetary Control | Funding Source Details | Contacts | Personnel

| Number | Issue Date | Type | Description |
|--------|-------------|-------|-------------------------------------|
| 1 | 06-JAN-2009 | Award | SET UP AS PER AWARD LETTER DATED 1 |
| 2 | 17-AUG-2010 | Award | BUDGET INCREASE DUE TO FX POLICY CH |

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- **Installments**
- Terms and Conditions
- Budgetary Control
- Funding Source Details
- Contacts
- Personnel
- Compliances
- Reports
- References
- Credit Receivers
- Tax agency

Funding Source Details | Contacts | Personnel | **Compliances** | Reports | References | Credit Receivers

Cost

Indirect Cost Schedule: **DRR 0 @ 20% (FW7 EF**
 Indirect Cost Rate Fixed Date:
 Allowed Cost Schedule: **EC FW7 ERC**

Rules

Billing Distribution Rule: **Event**
 Revenue Distribution Rule: **Cost**

Billing

Billing Cycle: **Monthly**
 Terms: **30 NET**
 First Billing Offset Days: **0**

- The Revenue Distribution rule will always be Cost but billing could either be **Cost** or **Event**. Cost billing indicates that the bill is generated from the actual costs posted over a period (known as the Billing Cycle) and Event billing indicates that the bill is generated from a schedule of payments loaded on the Award. For Event billing the payment schedule can be viewed by clicking on the **Events** button.
- Close the *Award Management* screen to return to the award status screen by clicking on the folder icon in the tool bar.
- Select the drilldown buttons as required to view a breakdown of the summary data.

| Award | Award Name | Revenue | Budget | Actual Cost | Commitment Amount | Total Cost | Available Balance | % Complete |
|---------|------------|------------|--------------|--------------|-------------------|--------------|-------------------|------------|
| RG12345 | ZZAG123 | 585,004.88 | 1,951,375.64 | 1,557,221.88 | 9,352.38 | 1,566,574.26 | 384,801.38 | 80 |

Resource Status: This displays award budget, actual costs, commitments, total cost and available balance by resource name.

Actuals: Enables you to search for actuals by expenditure type on the award.

Commitments: Enables you to search for actuals by expenditure type on the award.

Project Status: Displays details of the projects being funded by the award. It also provides further drilldown buttons to view details for each project.

Invoice Review: Shows the value of each bill generated and period it relates to as per screen shot overleaf.

| Award Number | Draft Invoice | Customer | Bill Split | Agreement | Invoice Currency | Invoice Amount | Invoice Status | Bill Through | Credited Number | Invoice Class |
|--------------|---------------|----------------|------------|-----------|------------------|----------------|--------------------|--------------|-----------------|---------------|
| RG52879 | 1 | EC FP7 ERC AIG | 100 | RG52879 | EUR | 593,083.44 | Accepted in Receiv | 30-SEP-2010 | | Invoice |
| RG52879 | 2 | EC FP7 ERC AIG | 100 | RG52879 | EUR | 33.98 | Accepted in Receiv | 01-JAN-2012 | | Invoice |
| RG52879 | 3 | EC FP7 ERC AIG | 100 | RG52879 | EUR | (593,083.44) | Accepted in Receiv | 29-FEB-2012 | | Invoice |
| RG52879 | 4 | EC FP7 ERC AIG | 100 | RG52879 | EUR | 582,748.67 | Accepted in Receiv | 29-FEB-2012 | | Invoice |
| RG52879 | 5 | EC FP7 ERC AIG | 100 | RG52879 | EUR | 537,369.98 | Accepted in Receiv | 28-MAR-2012 | | Invoice |

11. The **Open** button will give the sponsor details and the **Lines** button will show a breakdown of the bill.

Searching for more than one Award

To call up a list of awards, leave the number and short name blank and use the other fields to specify your search criteria. For example, for all pending awards select the status of on hold, or for all awards for a principal investigator enter their name in the key member section.

GMS Detailed Procedure Award Status Enquiry

Find Award Status

Award

Operating Unit: Cambridge University

Key Member

Name:

Number:

Role:

Periods

Period Start:

Period End:

Funding Source

Number:

Full Name:

Status:

Active

At Risk

Closed

On Hold

Clear Find

Click in the status field
and select from the pick
list