CFF Grants Management System

"How To" User Guide for Active Awards - March 2023

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(Specific Guide for Activated Awards marked *)

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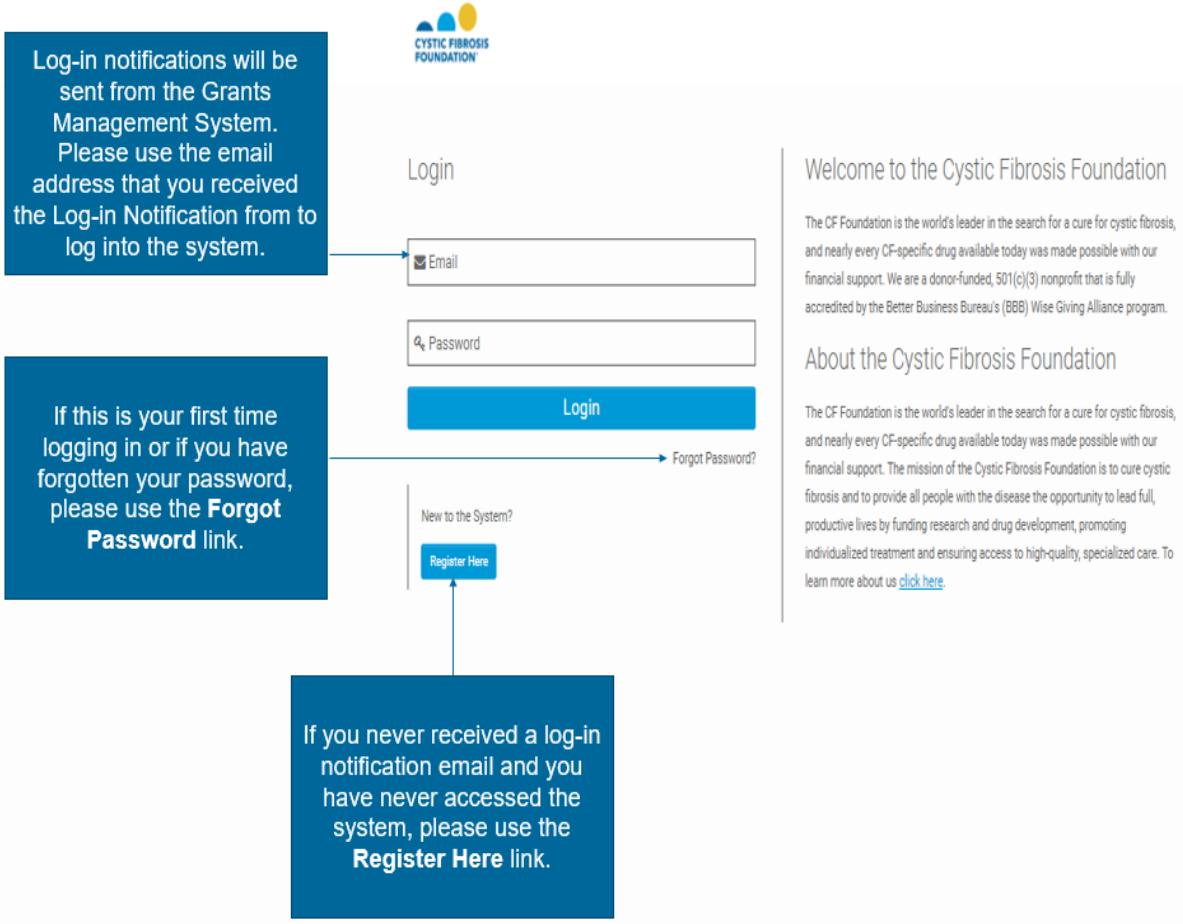
How to Log In:

Go to the URL https://awards.cff.org/ to access the Grants Management System



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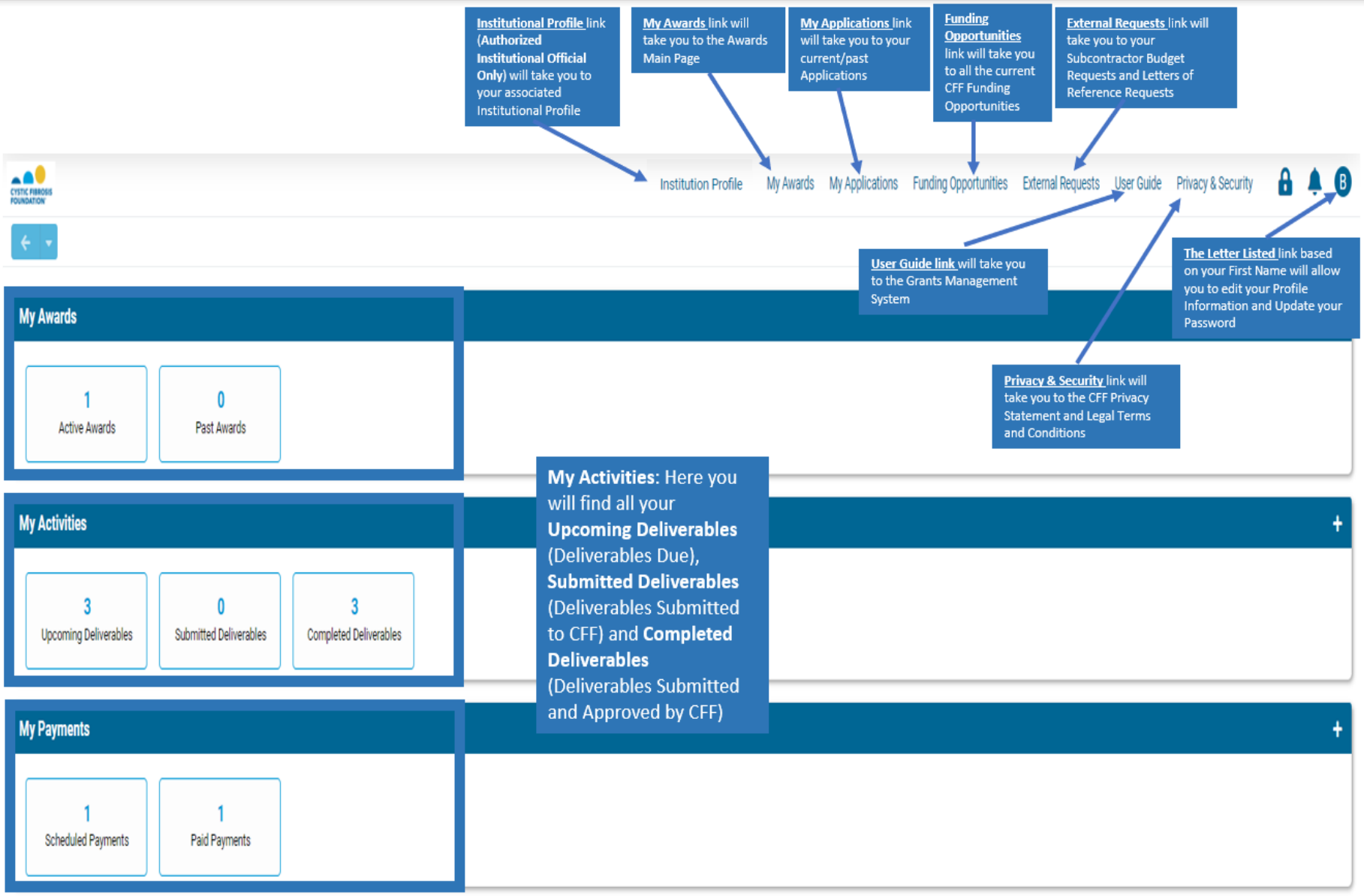
How to Navigate the Main Page:



My Awards: Here you will find all your associated CFF Active Awards (Current) and CFF Past Awards (Completed). You will find all your specific award details in these modules.

My Activities: Here you will find all your **Upcoming Deliverables** (Deliverables Due), **Submitted Deliverables** (Deliverables Submitted to CFF) and **Completed Deliverables** (Deliverables Submitted and Approved by CFF)

My Payments: Here you will find all your Scheduled Payments (Contingent OR Scheduled) and Paid Payments (Payments Paid)

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Contact Definitions:

Principal Investigator (PI)/ Director: Individuals with full access to their application, award, deliverables, and payments. Only the Principal Investigator can add individuals (contacts) to the application/award and is the only one with the ability to grant Budget Access to other members of the team (contacts). The Principal Investigator must approve the Estimated Budget and the Report of Expenditures deliverables prior to submission. The Principal Investigator is responsible for their application and funded award, through the management of contracts, deliverables, and payment information.

Authorized Institutional Official (AIO): Individual with read-only access to the full application and award, and is required to electronically approval all applications, award letters and annual progress reports through the Adobe Sign process. The Adobe Sign process is completed through their associated email address, not in the Grants Management System. Individual responsible for the oversight of all awards issued to their institution. Only the AIO has the authority to legally obligate the institution to the terms and conditions of award and person to whom the application and award letter will be submitted for signature.

Financial Officer: Individual with access to review and edit all financial documents associated with the application and award; and is required to sign all Post-award financial documents (Estimated Budget and Report of Expenditures) in the system prior to submission to CFF. The Financial Officer is not required to sign off the application budget.

Pre-award Contact: Individual with full access to the application and supporting documents, with the exception of the budget. The PI must provide permission online by granting Budget Access for the Pre-Award Contact to access and work on the budget.

Post-award Contact: Individual with full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Post-Award Contact to access and work on the Estimated Budget and Report of Expenditures.

Grants Officer: Individual with full access to the application and supporting documents, award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Grants Officer to access and work on the Estimated Budget and Report of Expenditures.

Administrative Contact: Individual with full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Grants Officer to access and work on the Estimated Budget and Report of Expenditures.

Coordinator: Individual with full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Coordinator to access and work on the Estimated Budget and Report of Expenditures.

Mentor: Individual with access to review the full application of a Fellow but cannot submit the application on their behalf. The Mentor does not have access to the funded award.

Co-Investigator/ Co-Director: Individuals who do not have access to the application but is considered in review for conflicts of interest. The Co-Investigator/ Co-Director has full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Co-Investigator to access and work on the Estimated Budget and the Report of Expenditures.

Collaborator: Individual who collaborates with the PI and has effort on the project but is not associated with the project institution. The Collaborator does not have access to the funded award.

Subcontractor: Individual who approves the subcontractor budget for the application. The Subcontractor does not have access to the application or award. The Subcontractor approves of the application budget through the External Requests tab.

Community Representative: Individual who is part of the CF Community and may serve on review committees.

Reviewer: Individual who serves on a review committee and provides scores of applications.

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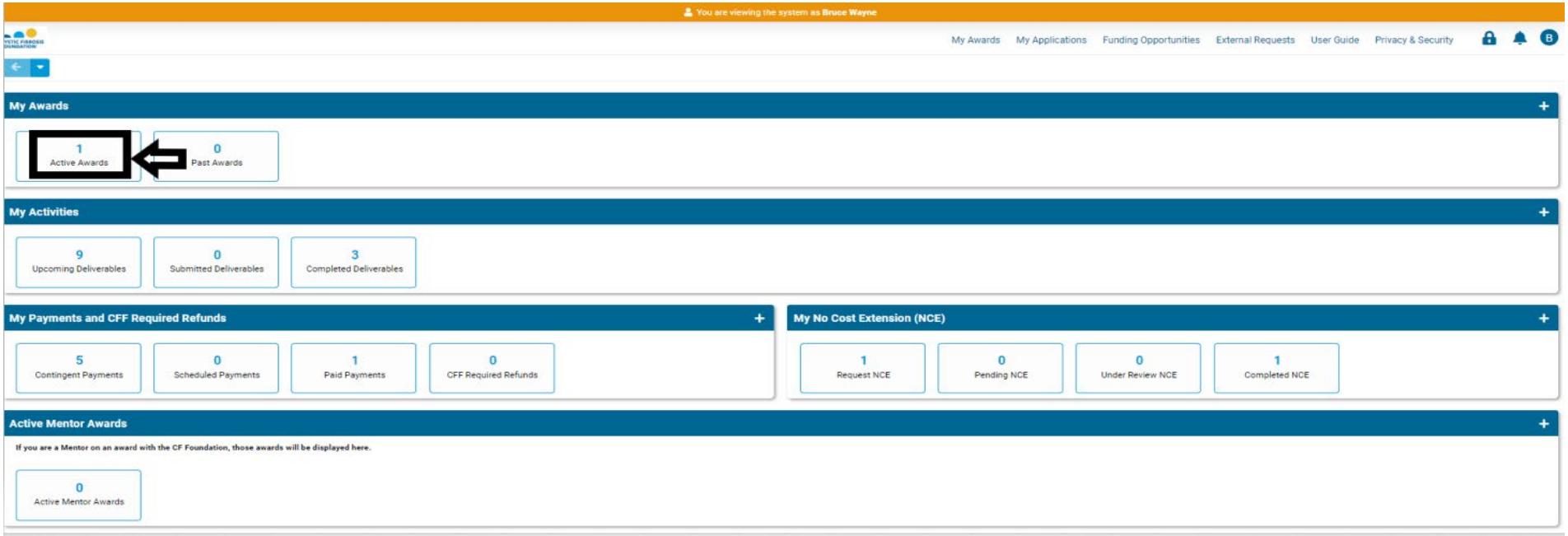
How to Add Contacts

Please Note: Only the Principal Investigator can add individuals (contacts) to the application/award and is the only one with the ability to grant Budget Access to other members of the team (contacts). If you need access to view an award and all payments/deliverables associate with that award, **please contact the Principal Investigator of the award to request access.**

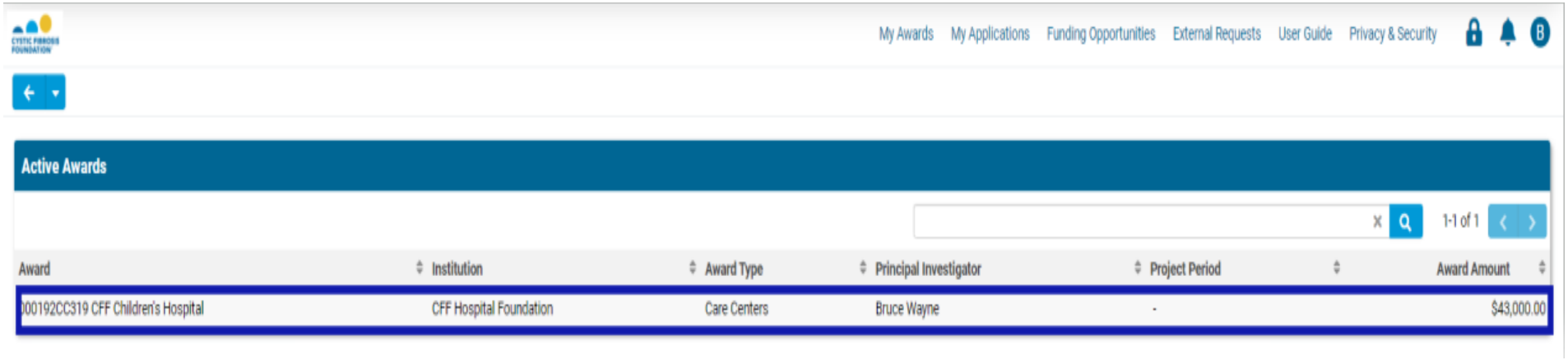
1. To add contacts to an award, the **Principal Investigator** of the award should go to their **My Awards** homepage and click on the **Active Awards** tile under the **My Awards** module.



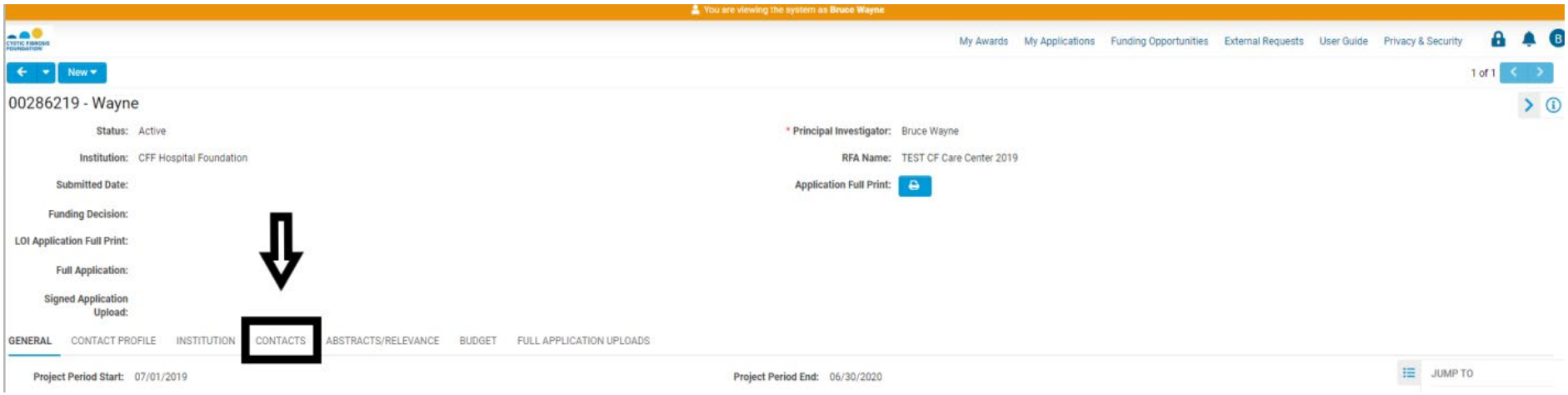
2. The **Principal Investigator** should next click on the **Active Award** that the contact requires access too.

   PLEASE NOTE: Contacts must be added to each individual award.

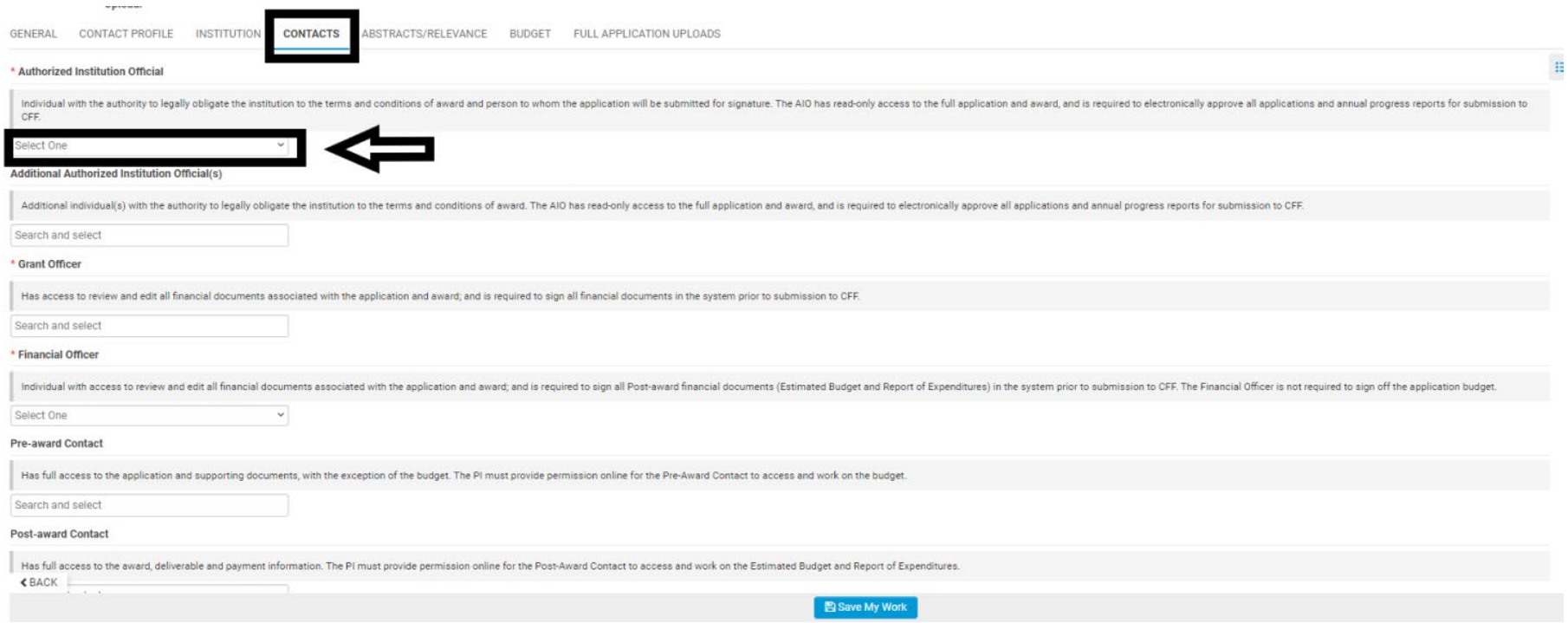
   *For Care Center awards, contacts would need to be added for every fiscal year awarded.



3. On the Award Profile Page, the **Principal Investigator** should click on the **CONTACTS** tab to add contact to the award.



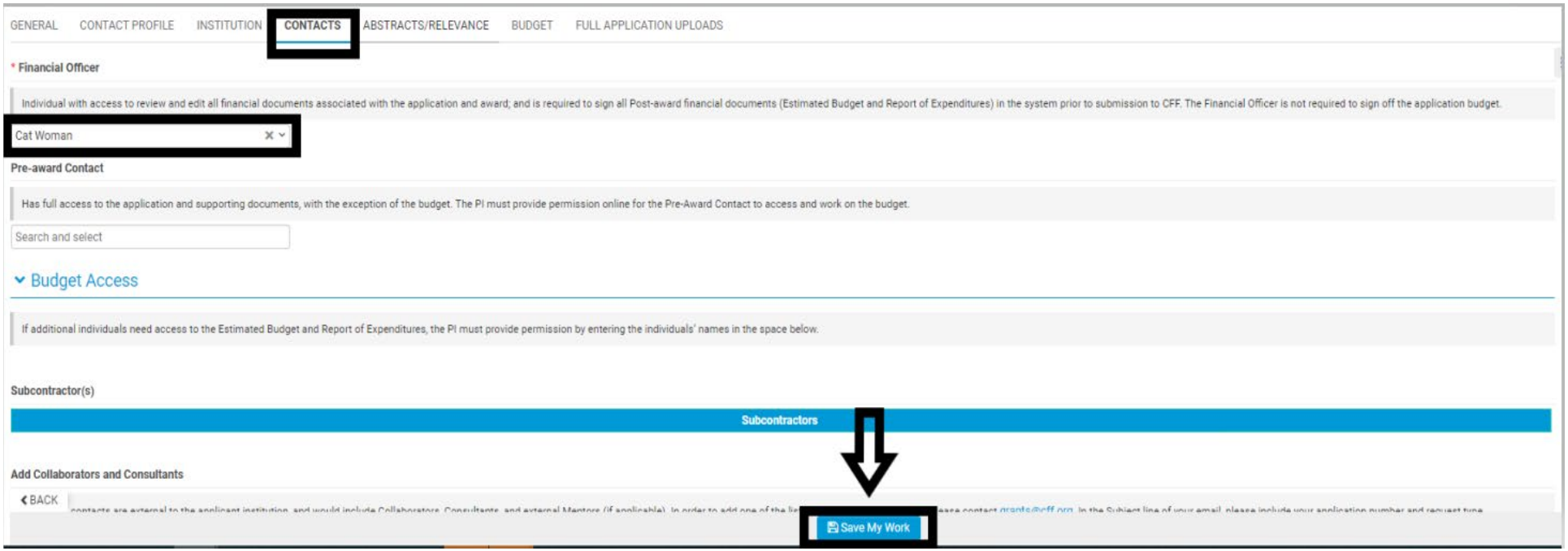
4. Under the **CONTACTS** tab, the **Principal Investigator** will be able to add a contact by clicking into the look-up field below each contact role. By clicking on the look-up field, all contacts associated with the **Principal Investigator's Institution AND that are associated with the contact role** will display. To add the contact, the **Principal Investigator** should click on the contact that displays in the look-up field.



PLEASE NOTE: If the contact does not appear in the look-up field, the contact must register themselves to the system by submitting a request through the https://awards.cff.org/ log-in page and clicking on the **Register Here** button.

5. When the contact is selected, the **Principal Investigator** will need to click on the **Save My Work** button at the bottom of the Award Profile Page. Once saved, the contact will have access to the Award on the system.

   Please refer to the Contact Definitions guide (Page 5) to view all the permissions each contact role has in the system.



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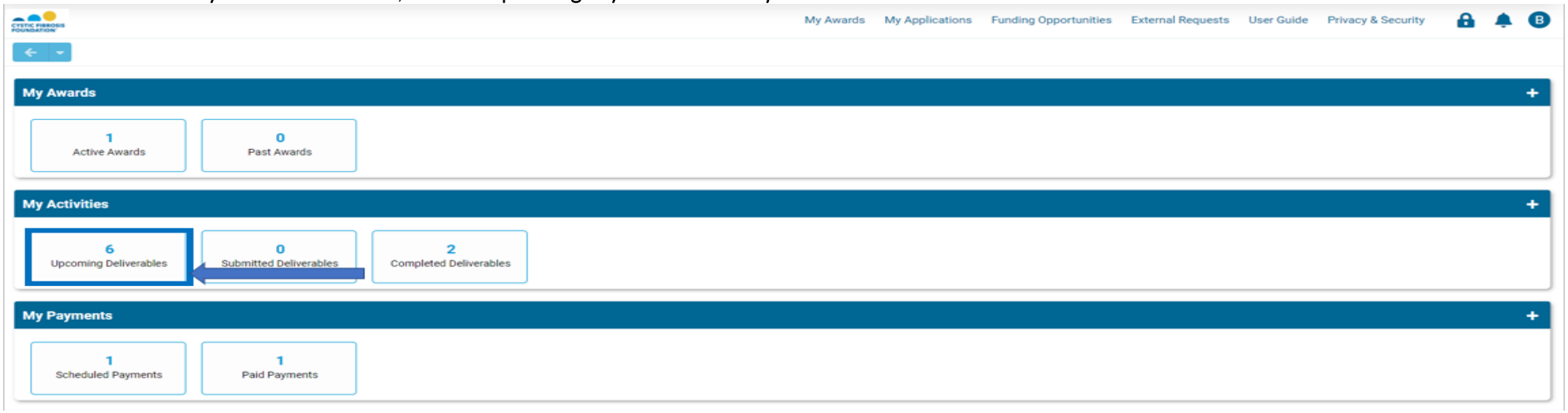
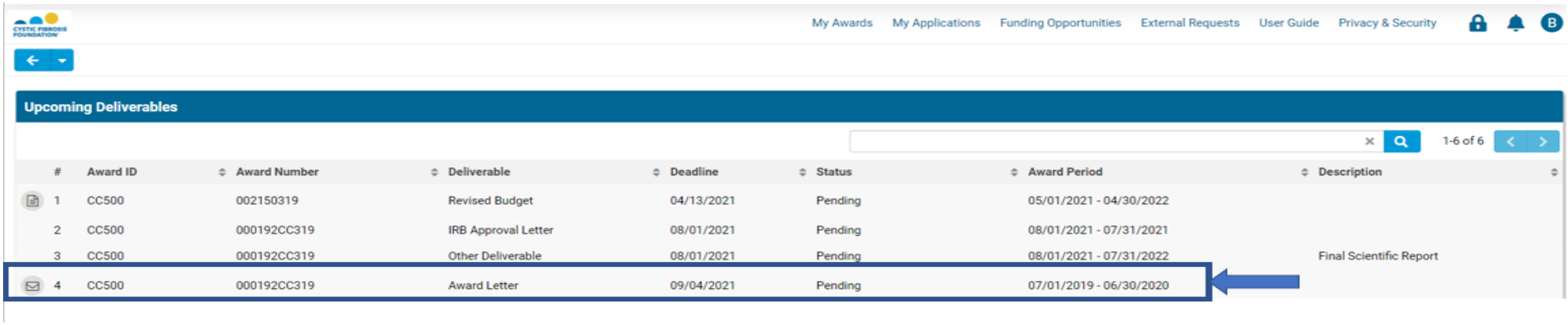
How to Accept an Award Letter (Principal Investigator):

1. Log into https://awards.cff.org/
2. On the **My Awards** Dashboard, Click on **Upcoming Payments** under **My Activities**

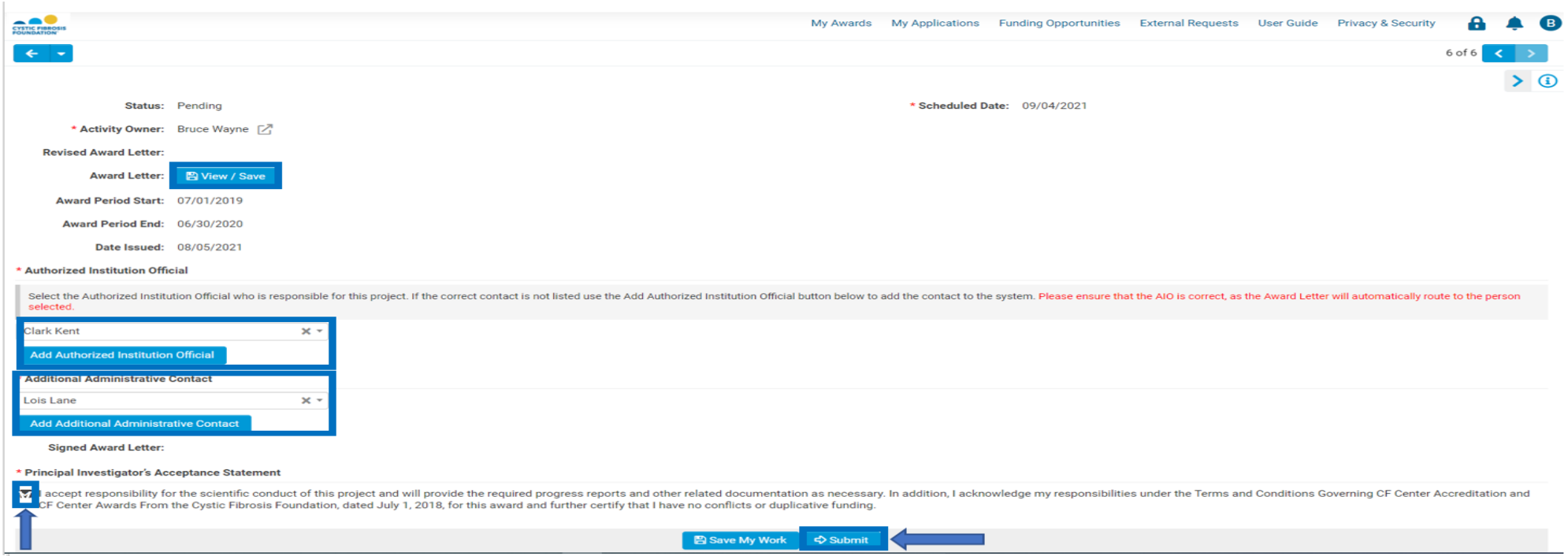


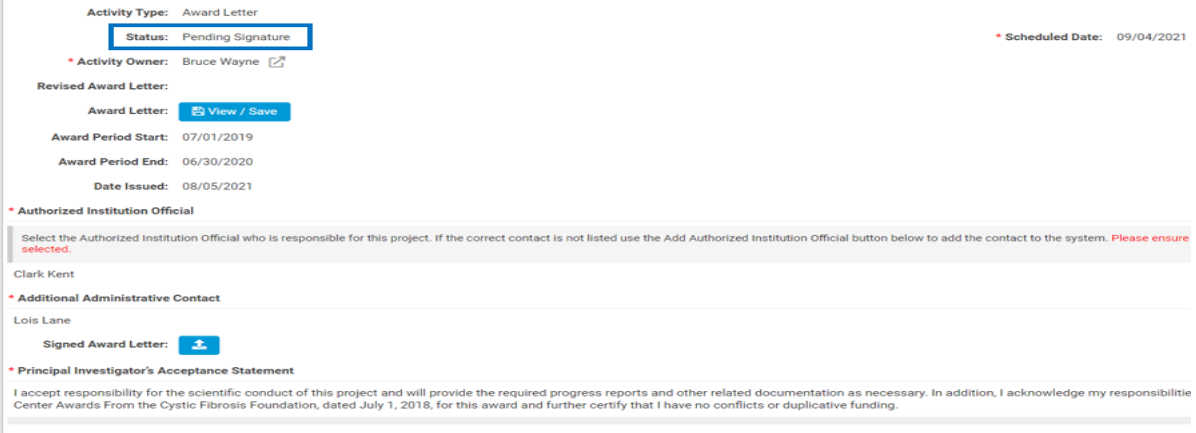
3. On the **Upcoming Deliverables** tab, you can find the **Award Letter** deliverable in "**Pending**" status. Click on the **Award Letter** deliverable.



4. Enter your Authorized Institutional Official and Additional Administrative Contact information on the Award Letter page. **PLEASE NOTE:** You must first associate the contact with your award before adding them to your Award Letter (for instructions, see "How to Add Contacts").

5. By clicking the **View/Save** button, you can view your Award Letter. To authorize the Award Letter, review the Acceptance Statement of the Principal Investigator, check off the box next to the statement and click Submit. The Award Letter will move to "**Pending Signature**" status. This means that Adobe Sign will automatically route the Award Letter to the Authorized Institutional Official's email address. The Adobe Sign email will request the Authorized Institutional Official's e-signature. When the Authorized Institutional Official provides their e-signature, the Award Letter will automatically route back to the Grants Management System and the status will move to "**Submitted**". The status will move to "**Completed**" once approved by the CFF Grants Team.





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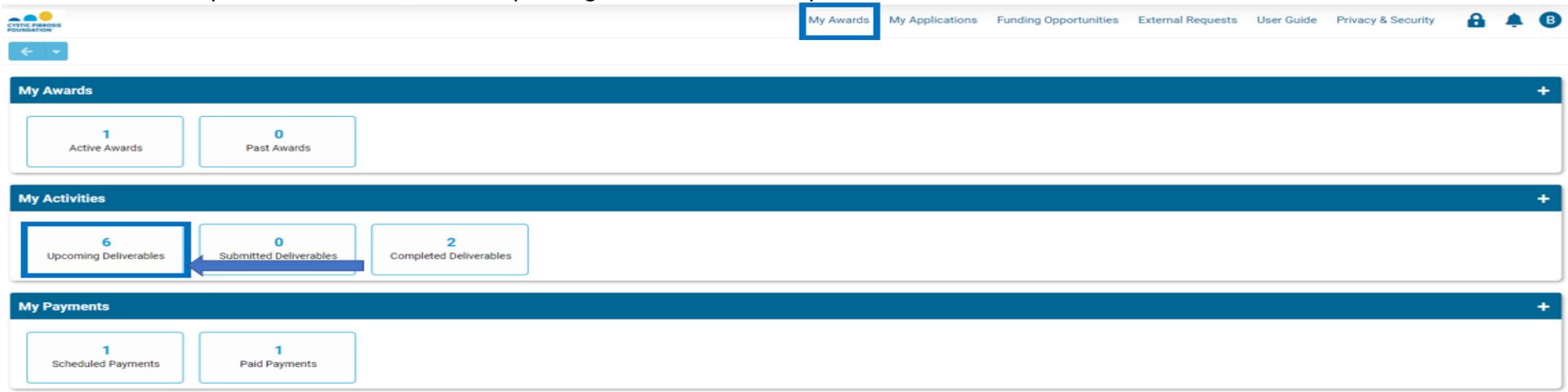
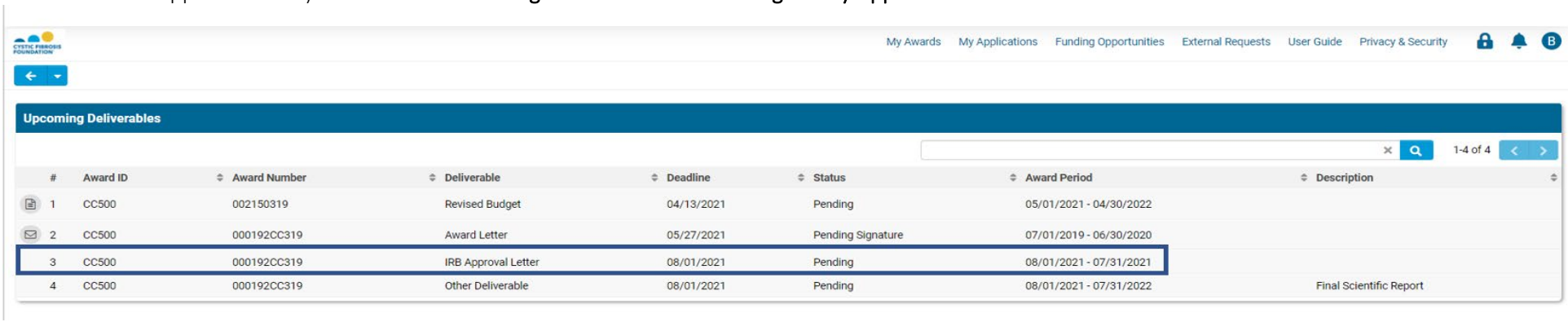
How to Upload Deliverables – Regulatory Approvals:

1. Log into https://awards.cff.org/
2. On the **My Awards** Dashboard, Click on **Upcoming Deliverables** under **My Activities**



3. On the **Upcoming Deliverables** tab, you can find the **Regulatory Approval** (IRB Approval Letter, IACUC Approval Letter, rDNA Approval Letter or IBC Approval Letter) deliverable in "**Pending**" status. Click on the **Regulatory Approval** deliverable.



#	Award ID	Award Number	Deliverable	Deadline	Status	Award Period	Description
1	CC500	002150319	Revised Budget	04/13/2021	Pending	05/01/2021 - 04/30/2022	
2	CC500	000192CC319	Award Letter	05/27/2021	Pending Signature	07/01/2019 - 06/30/2020	
3	CC500	000192CC319	IRB Approval Letter	08/01/2021	Pending	08/01/2021 - 07/31/2021	
4	CC500	000192CC319	Other Deliverable	08/01/2021	Pending	08/01/2021 - 07/31/2022	Final Scientific Report

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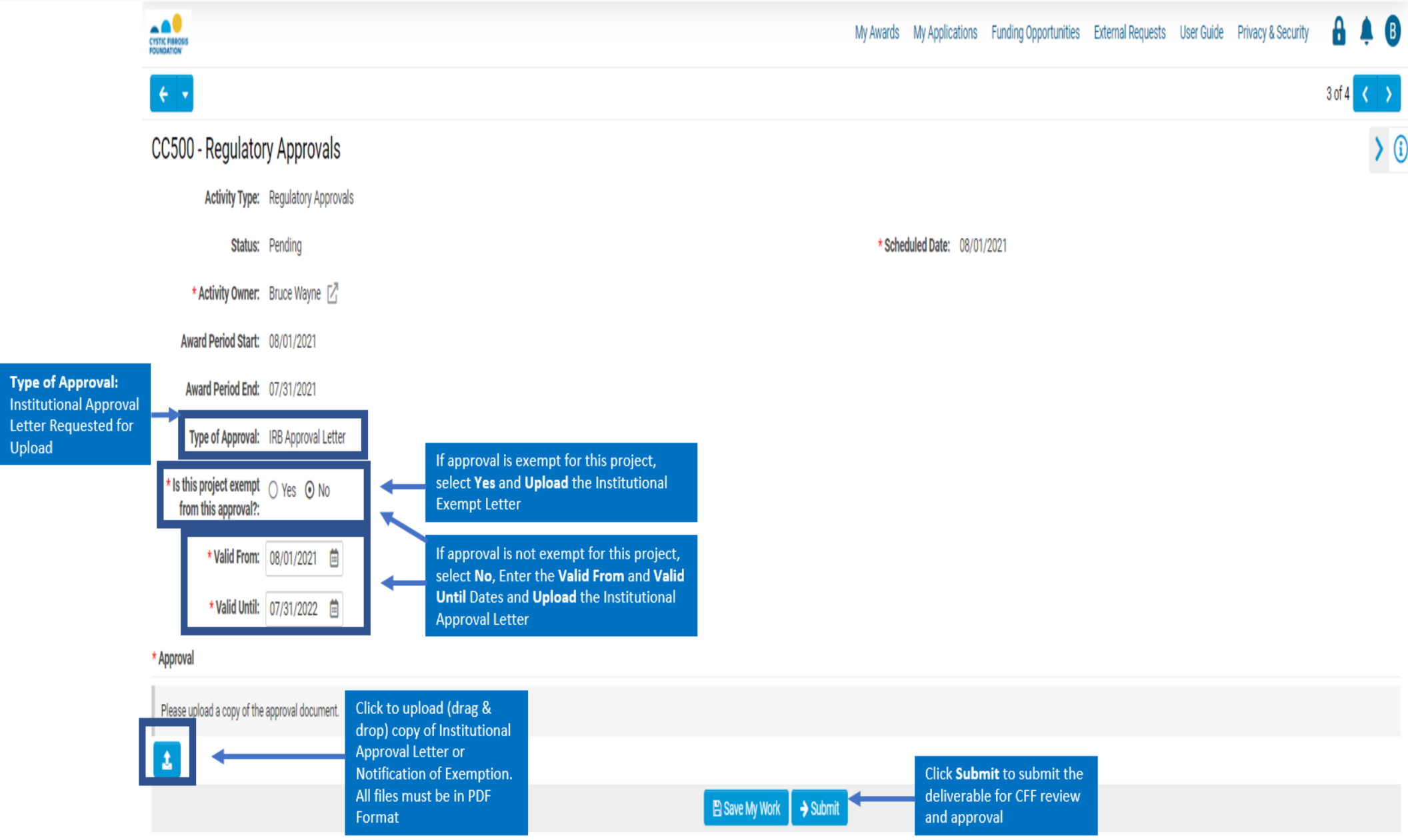

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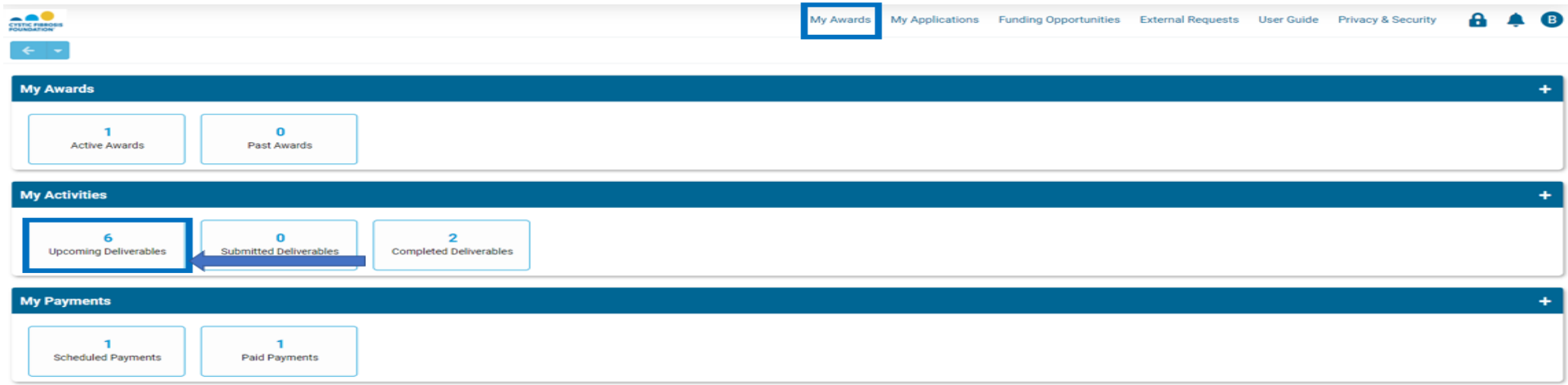
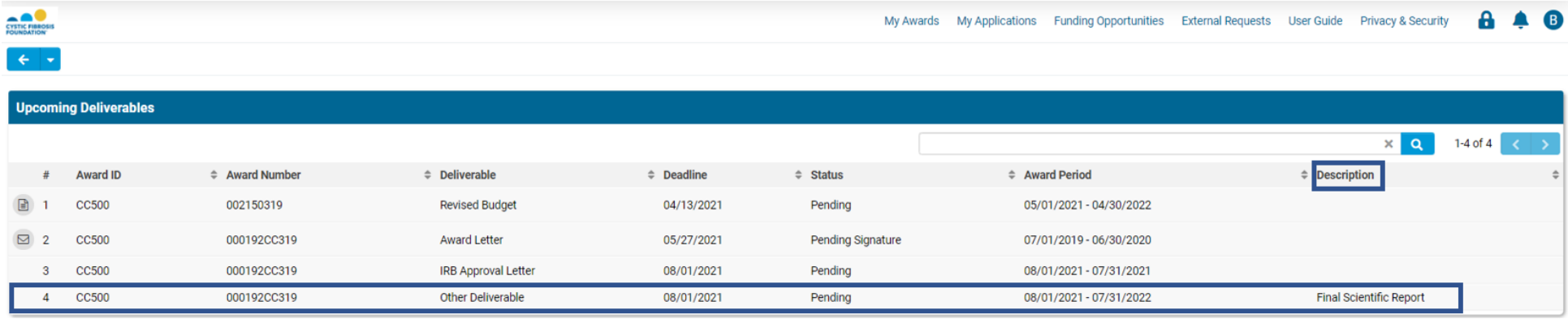
How to Upload Deliverables – Other Deliverable (Final Scientific Report and Final Report of Expenditures) - Activated Awards

1. Log into https://awards.cff.org/
2. On the **My Awards** Dashboard, Click on **Upcoming Deliverables** under **My Activities**



3. On the **Upcoming Deliverables** tab, you can find the **Other Deliverable** listed in "**Pending**" status. The requested deliverable will have the **Description** listed on the far right. Click on **Other Deliverable**. ***Please note:** All Activated Awards will have the Final Scientific Report and Final Report of Expenditures requested under **Other Deliverable.**



#	Award ID	Award Number	Deliverable	Deadline	Status	Award Period	Description
1	CC500	002150319	Revised Budget	04/13/2021	Pending	05/01/2021 - 04/30/2022	
2	CC500	000192CC319	Award Letter	05/27/2021	Pending Signature	07/01/2019 - 06/30/2020	
3	CC500	000192CC319	IRB Approval Letter	08/01/2021	Pending	08/01/2021 - 07/31/2021	
4	CC500	000192CC319	Other Deliverable	08/01/2021	Pending	08/01/2021 - 07/31/2022	Final Scientific Report

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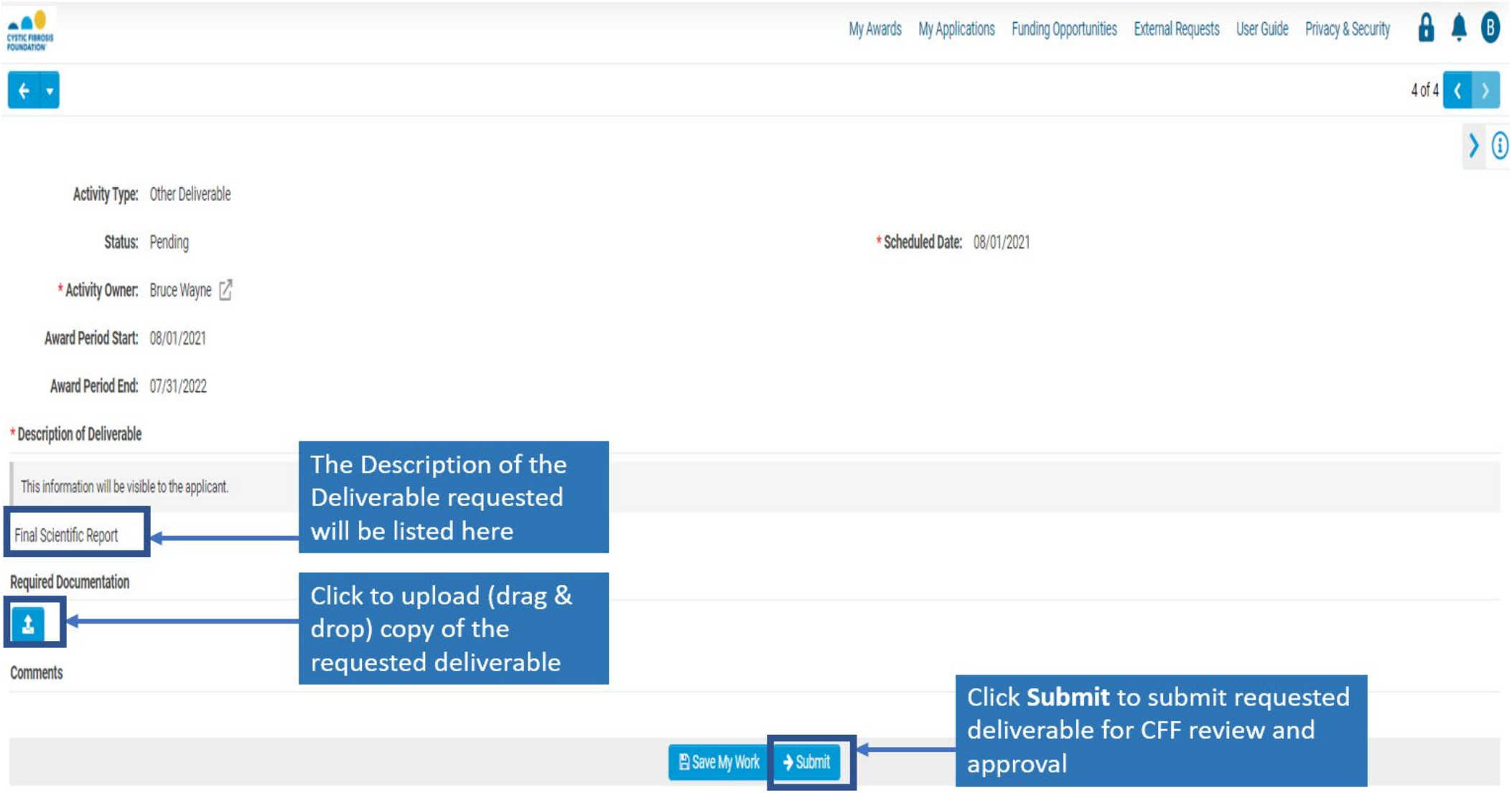
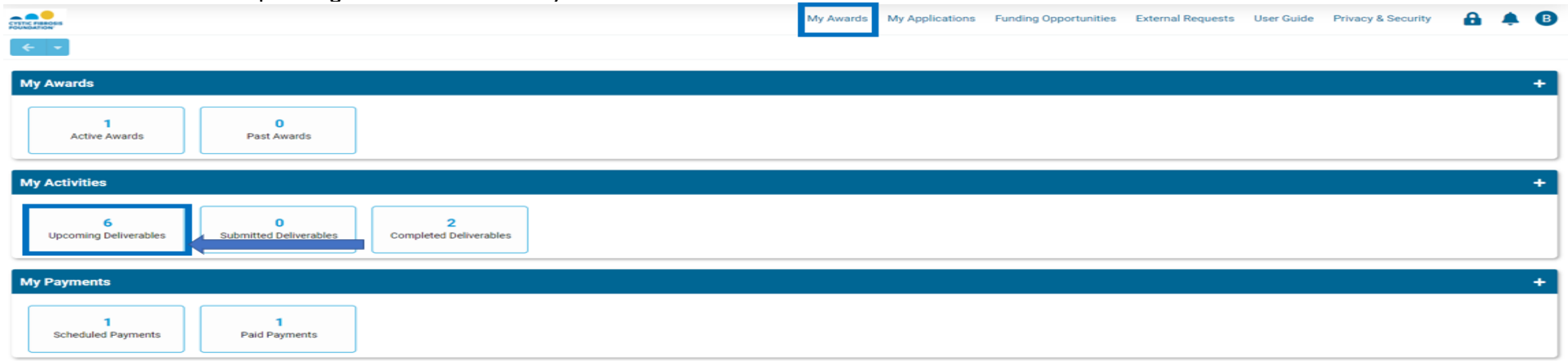


***Please note:** You may find all of our Reporting Forms for CF Foundation Awards at Reporting Forms for CF Foundation Awards

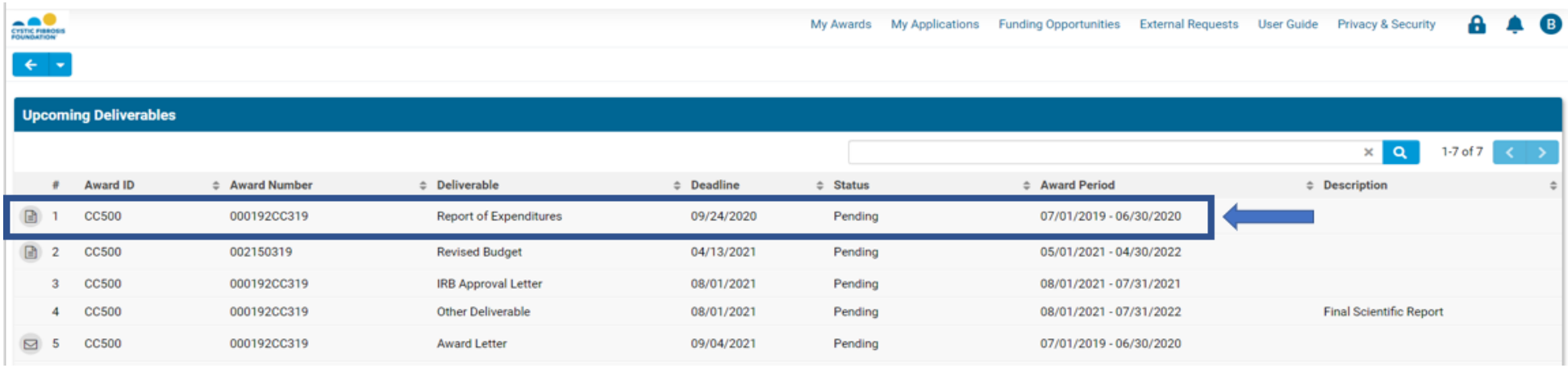
How to Grant Budget Access (Principal Investigator):

The **Estimated Budget** and the **Report of Expenditures** details and entry are accessible only to the **Principal Investigator** and the **Financial Officer** Contact. By completing the following steps, the **Principal Investigator** may grant Budget Access to contacts associated to their award for both financial reports.

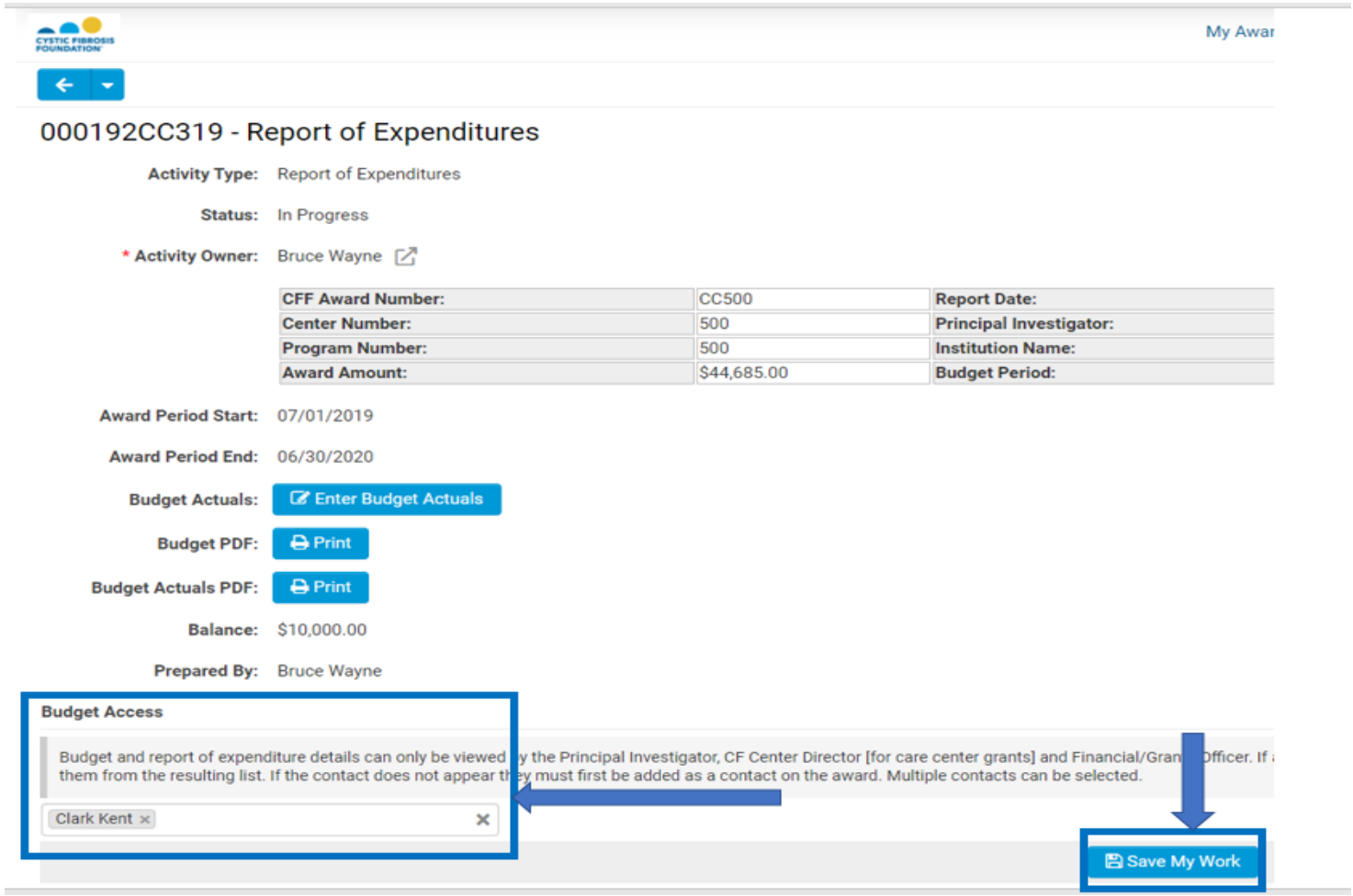
1. Log into https://awards.cff.org/
2. Click on Upcoming Deliverables under My Activities



3. To grant Budget Access to an associated contact, select the financial deliverable (**Estimated Budget (Care Centers)** or **Report of Expenditures**).



4. Begin typing the Contact name in the search box located on the bottom left side of the page. Make the Contact selection from the drop-down list and then click on **Save My Work.** The Contact that was selected will now be able to view/edit the budget. **PLEASE NOTE:** You will not be able to search for a Contact under **Budget Access** if the Contact has not been added to your Award Contacts. The Contact must be added to the Award with the same Project Period as the financial deliverable. Please see "How to Add Contacts" guide for further information.



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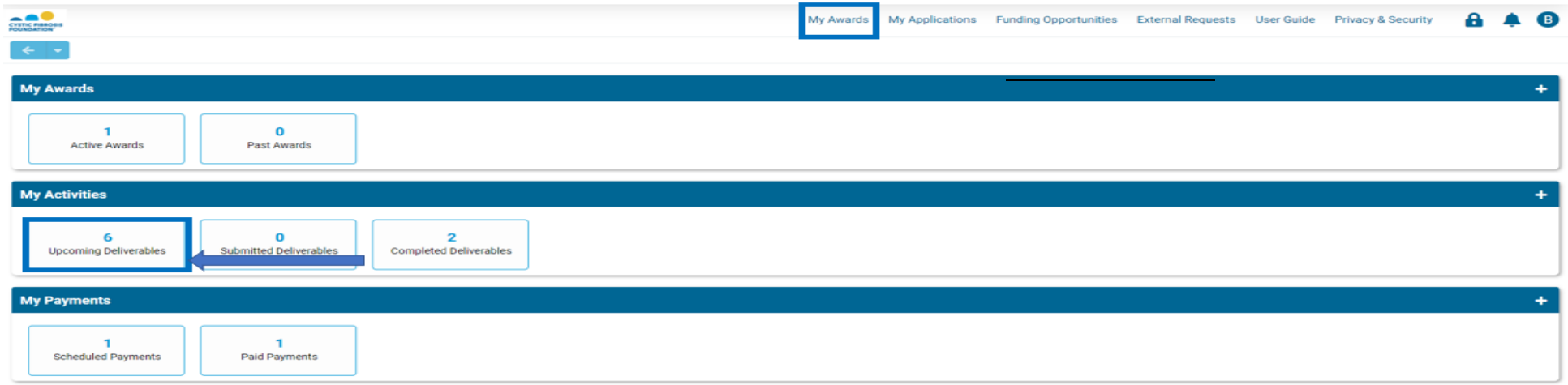
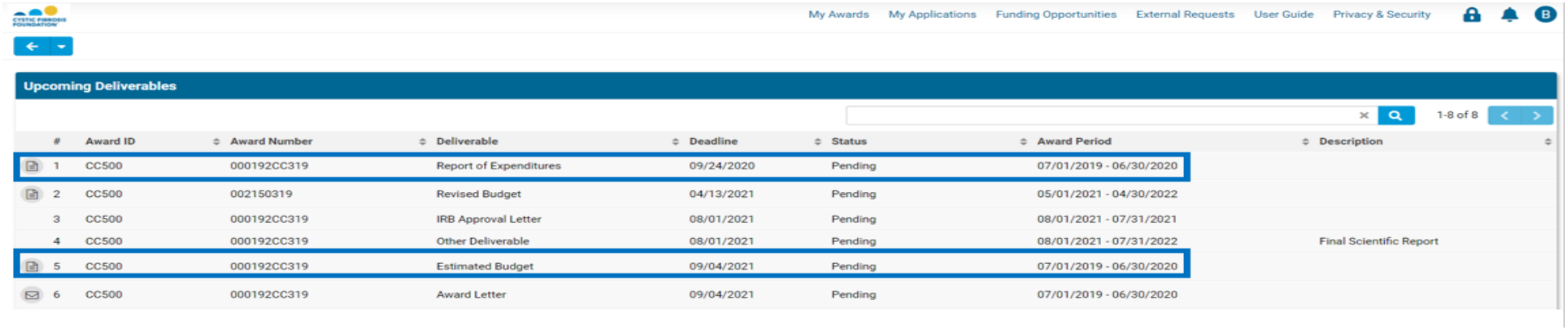
How to Enter in Financial Reports:

1. You may find all pending deliverables including your financial reports by clicking on **Upcoming Deliverables** under **My Activities**. **PLEASE NOTE:** You will only be able to view deliverables associated to an Award if the Principal Investigator has added you as a contact to their award (For more information, see refer to "How to Add Contacts")

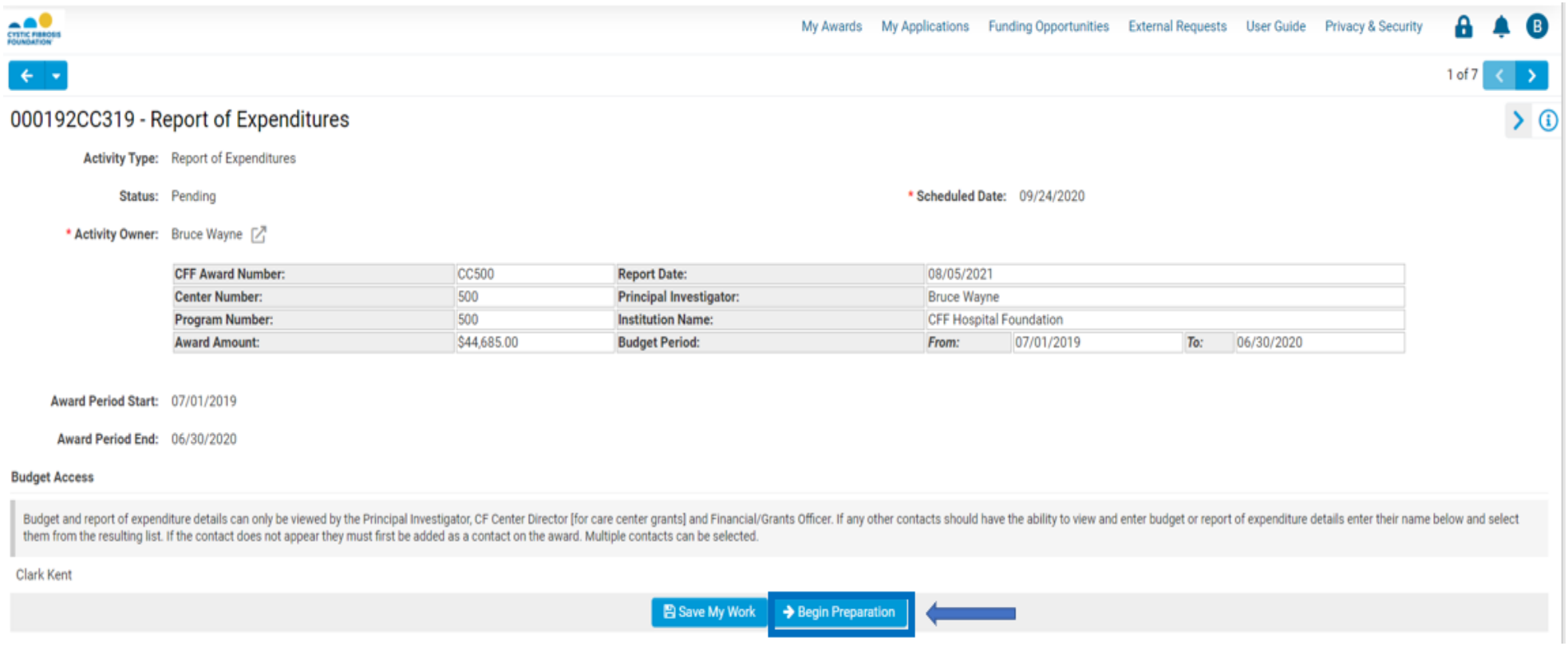


2. The Upcoming Deliverables page lists all outstanding deliverables for a given award. To begin, click on either the **Estimated Budget** (**Care Centers Awards Only**) or the **Report of Expenditures**. **PLEASE NOTE:** For Care Center Awards, the system will not allow you to enter in the **Report of Expenditures** if the **Estimated Budget** has not been submitted and approved or if our Program Administrator has requested changes to the **Estimated Budget.**

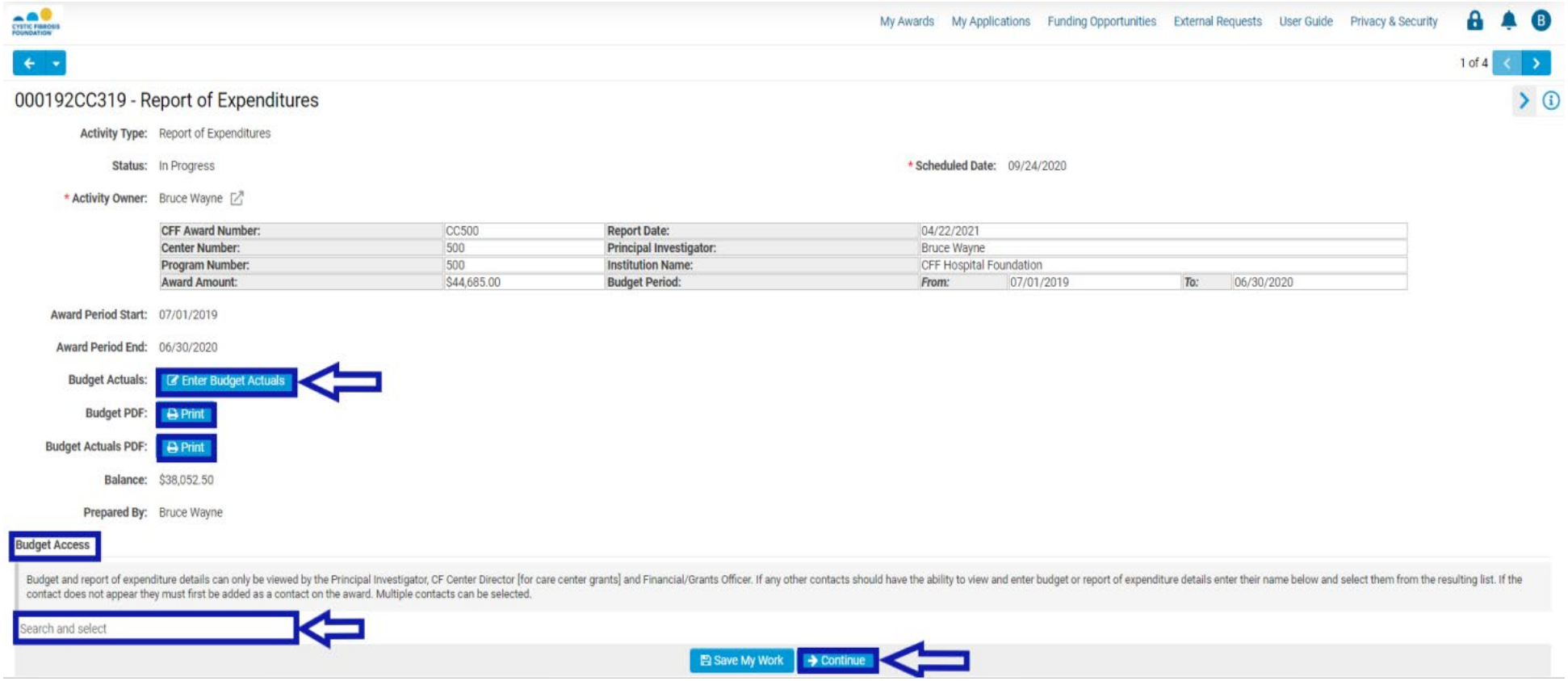


#	Award ID	Award Number	Deliverable	Deadline	Status	Award Period	Description
1	CC500	000192CC319	Report of Expenditures	09/24/2020	Pending	07/01/2019 - 06/30/2020	
2	CC500	002150319	Revised Budget	04/13/2021	Pending	05/01/2021 - 04/30/2022	
3	CC500	000192CC319	IRB Approval Letter	08/01/2021	Pending	08/01/2021 - 07/31/2021	
4	CC500	000192CC319	Other Deliverable	08/01/2021	Pending	08/01/2021 - 07/31/2022	Final Scientific Report
5	CC500	000192CC319	Estimated Budget	09/04/2021	Pending	07/01/2019 - 06/30/2020	
6	CC500	000192CC319	Award Letter	09/04/2021	Pending	07/01/2019 - 06/30/2020	

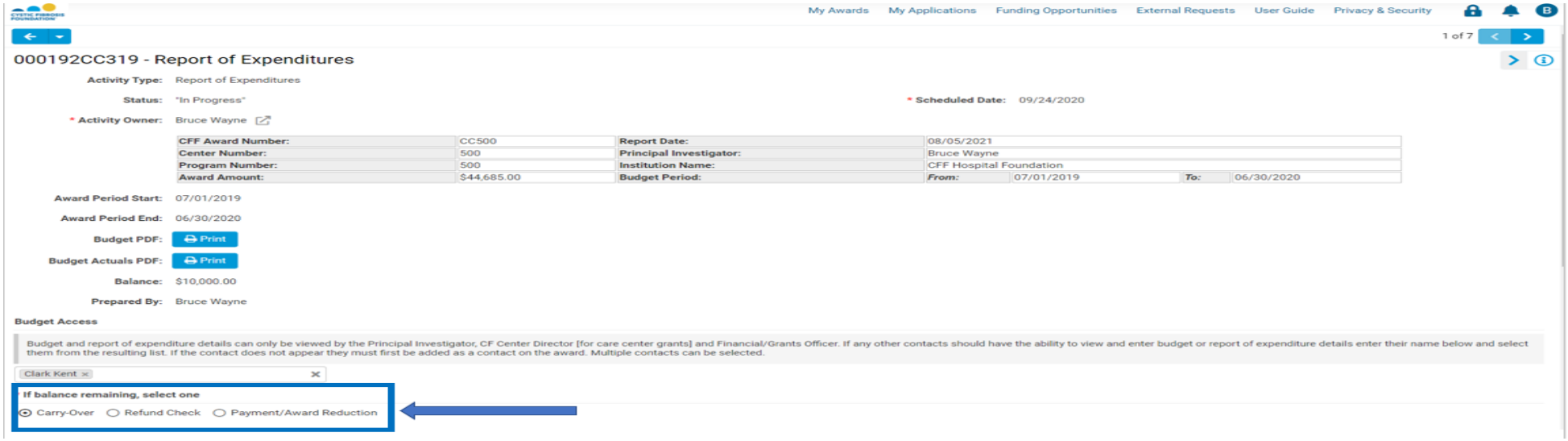
3. On the **Estimated Budget** (**Care Centers**) or **Report of Expenditures** page, click on **Begin Preparation** to "claim" the Financial Report. This will change the status of the Financial Report to "**In Progress**".

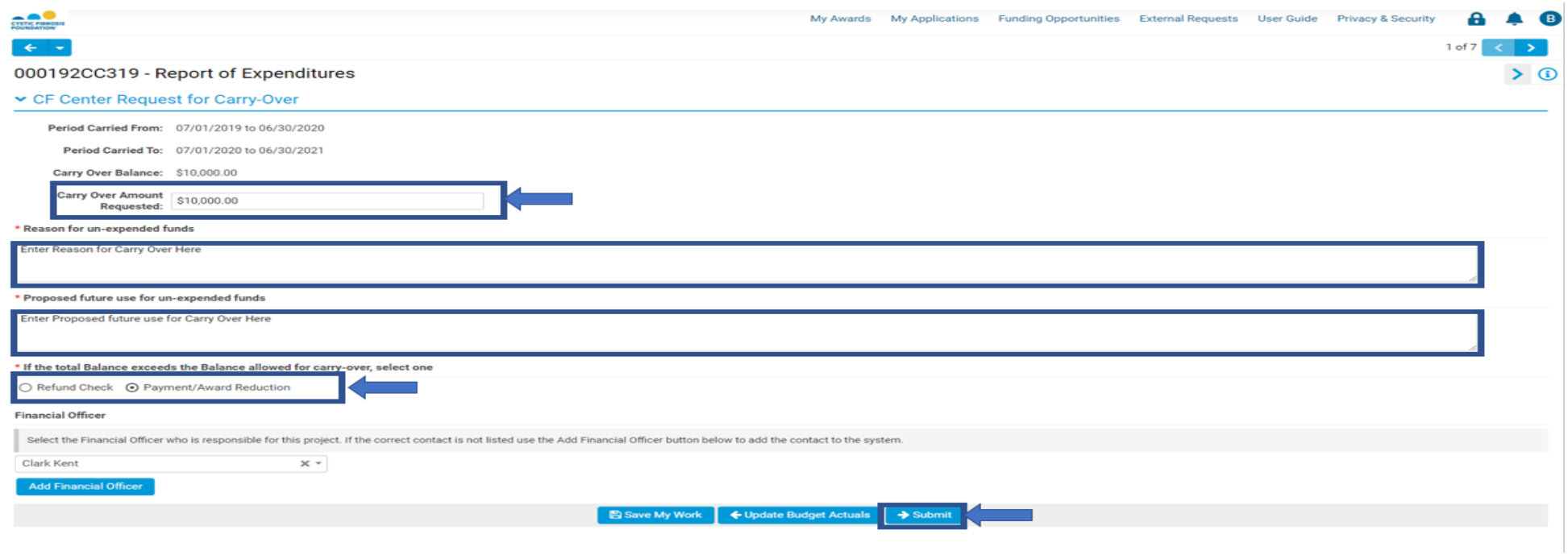


4. When the **Estimated Budget** (**Care Centers**) or **Report of Expenditures** is "**In Progress**" status, you will be able to enter in the Budget Actuals (expenditures) by clicking on the **Enter Budget Actuals** button. You will also be able to view the budget by clicking on the **Print** button. Click **Continue** once the budget has been entered. **PLEASE NOTE:** Only the Principal Investigator and Financial Officers can enter in the Budget. If you are a contact that needs to enter in the budget, you must request Budget Access from the Principal Investigator (Refer to "How to Grant Budget Access").

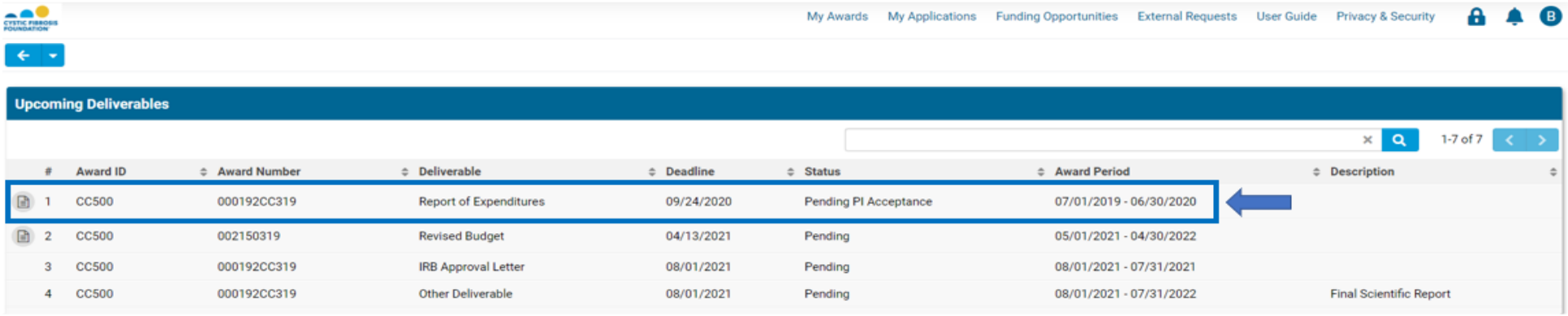


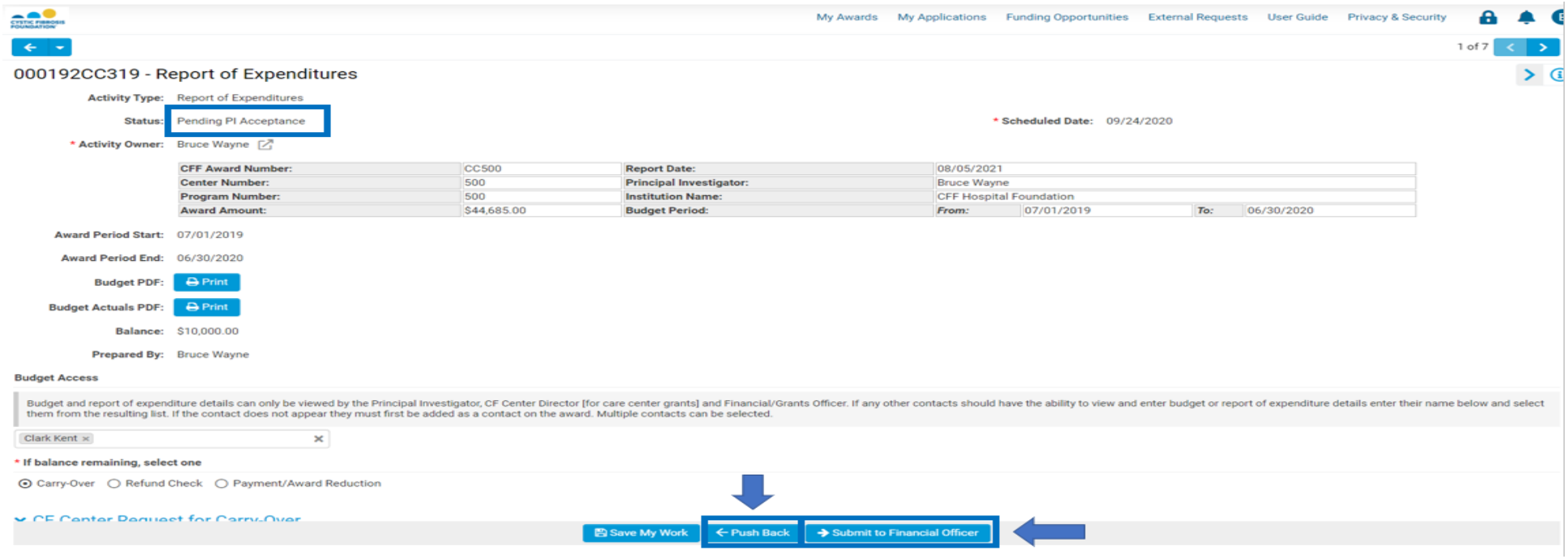
5. ***Report of Expenditures Only:*** If there is a balance remaining, you must select an option for the remaining balance (Carry-Over, Refund Check, Payment/ Award Reduction). Once all information has been entered click on the **Submit** button. **PLEASE NOTE:** If the Carry-Over option is selected, the system will request a justification for the Carry-Over amount.



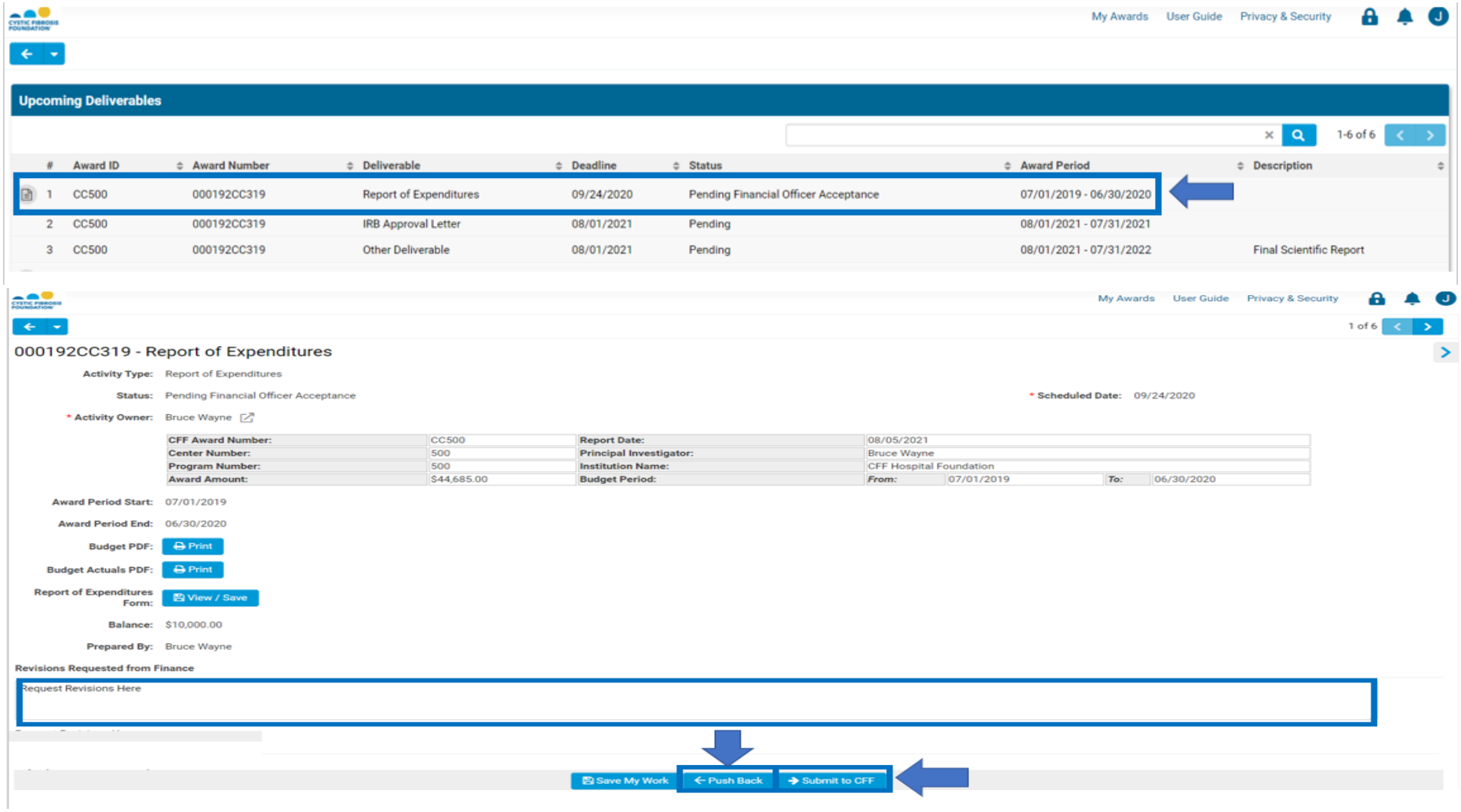


6. Once the Budget has been entered and submitted, the status of the **Estimated Budget** (**Care Centers**) or **Report of Expenditures** will go to "**Pending PI Acceptance**". The Principal Investigator must log in, click on **Upcoming Deliverables**, and select either the **Estimated Budget** (**Care Centers**) or **Report of Expenditures** that has the status "**Pending PI Acceptance**". On the **Estimated Budget** (**Care Centers**) or **Report of Expenditures** page, the Principal Investigator can review the budget and make any edits. If the Principal Investigator wants to request any revisions from their administration team, the Principal Investigator can select **Push Back** and the status of the Financial Report will revert back to "**Pending**". Once the Financial Report is complete, the Principal Investigator will submit the budget to the Financial Officer by clicking on **Submit to Financial Officer**.





7. The **Estimated Budget** (**Care Centers**) or **Report of Expenditures** will now be in "**Pending Financial Officer Acceptance**" status. The **Financial Officer** will need to log in, click on **Upcoming Deliverables**, and select the **Estimated Budget** (**Care Centers**) or **Report of Expenditures** that has the status "**Pending Financial Officer Acceptance**". On the **Estimated Budget** (**Care Centers**) or **Report of Expenditures** page, the Financial Officer may request revisions with comments by selecting **Push Back** – this will revert the status of the report to **Revisions Requested**. If no revisions are requested, the Financial Officer may submit the report by clicking on the **Submit to CFF** button. **PLEASE NOTE:** Only the Financial Officer can submit the Financial Reports to CFF. The status of the report will move to "**Submitted**". The status of the report will move to "**Reviewed and Approved**" when the CFF Program Administrator approves the report.

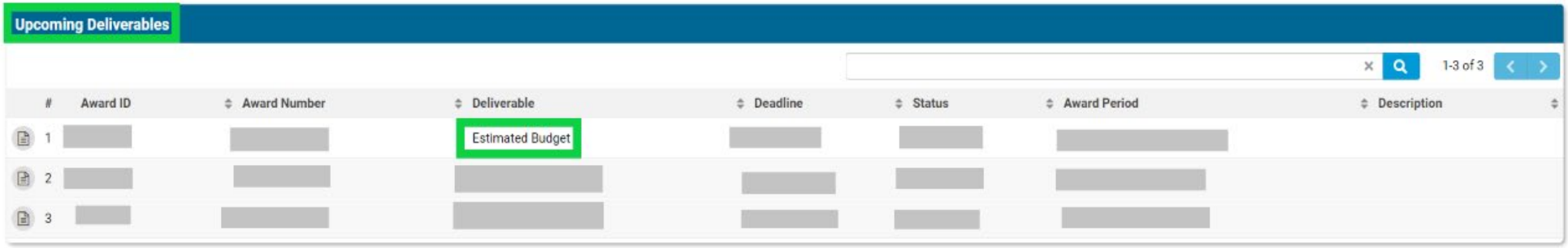


CYSTIC FIBROSIS FOUNDATION®

How to Enter in the Estimated Budget - Care Center Awards

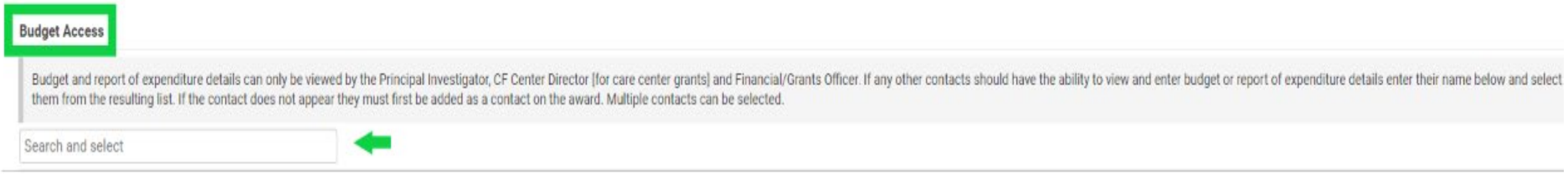
1. Principal Investigators (PIs) can locate any Upcoming Deliverables within the **Upcoming Deliverables** button under **My Activities**

2. Once inside the **Upcoming Deliverables,** you will see outstanding deliverables for all awards accessible through the GMS in date order. Click the Estimated Budget deliverable.



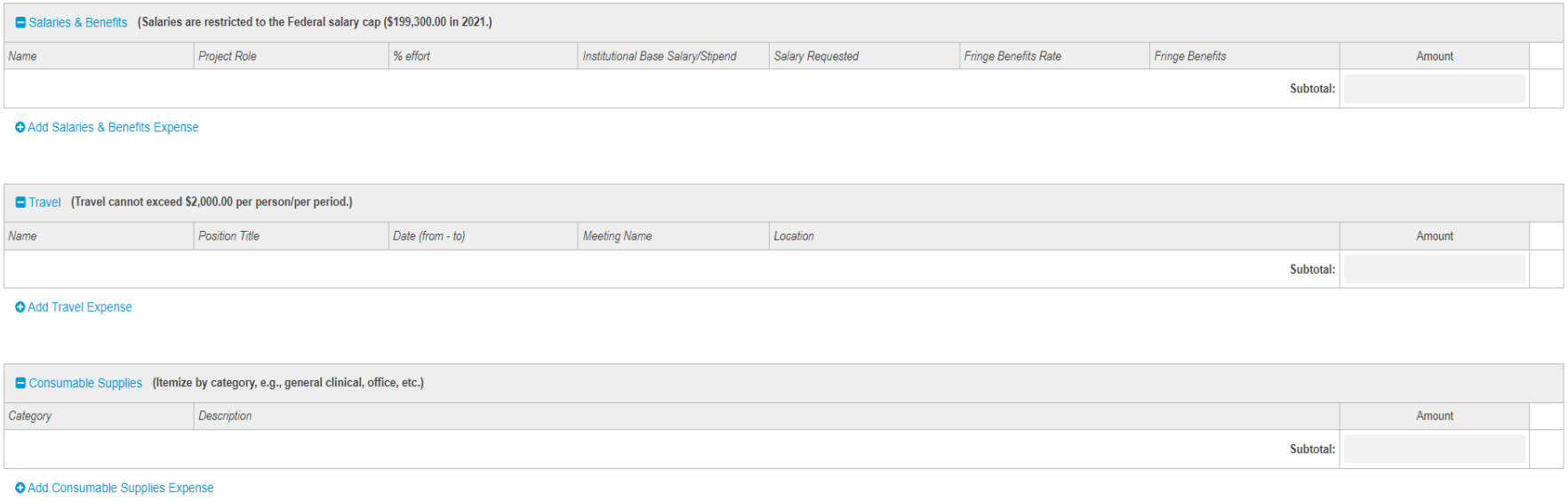
3. You can then enter the Estimated Budget by clicking the Enter Budget button.

4. If you would like to designate a team member to access the budget, please enter their name in the **Budget Access** option.

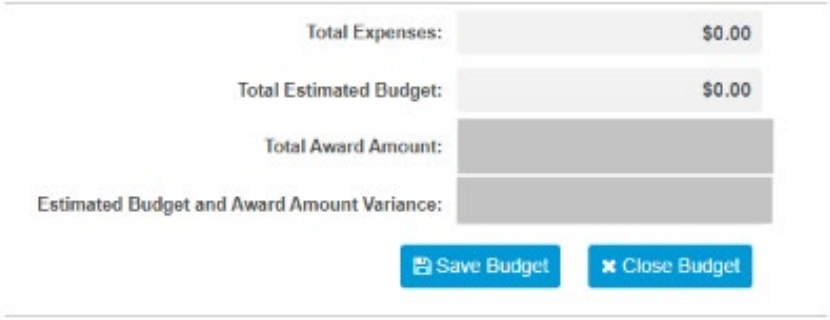


***Please remember only PIs, CF Center Directors, and Financial Officers can have access to a budget.**

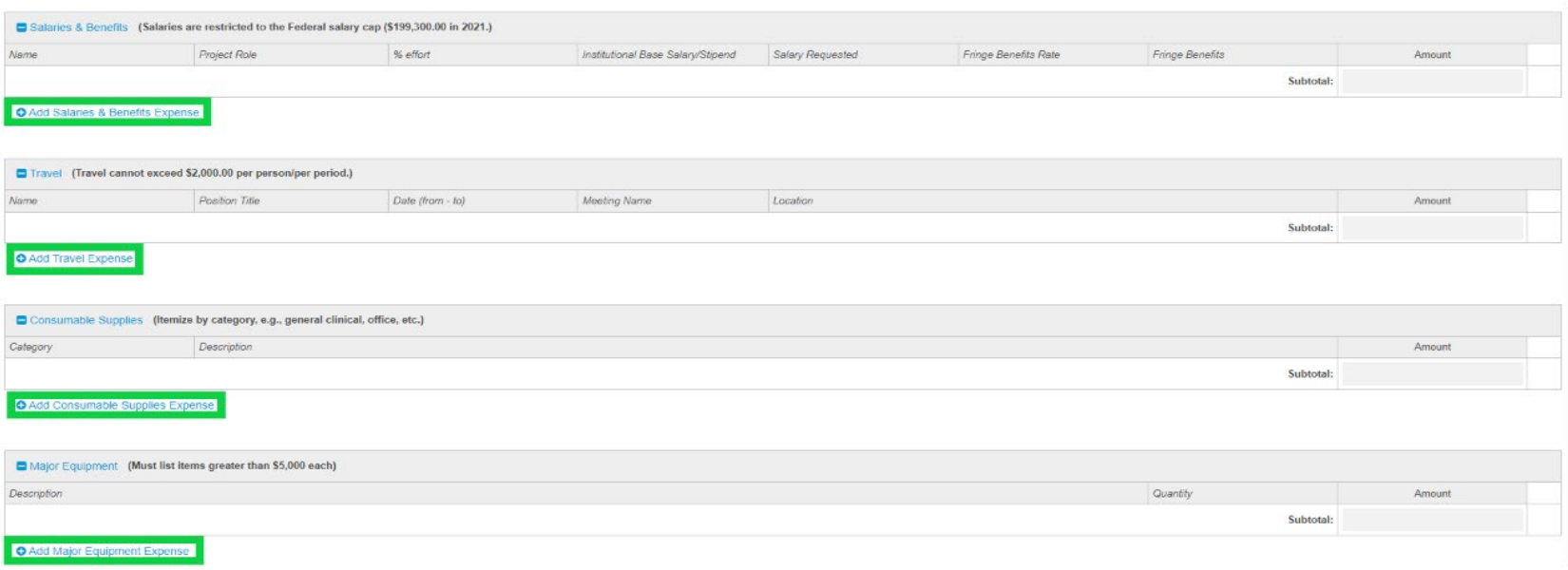
5. Upon clicking the **Enter Budget** button, please be sure to enter line items for each section as your budget allows. Nothing in the Estimated Budget is prepopulated from the previous year.



6. Only the **Total Award Amount** is prepopulated.



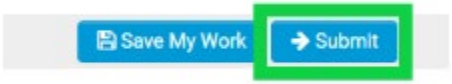
7. To add line items in the different sections of the **Estimated Budget**, click the blue plus sign **(+)** next to **Add [Section Name]**



8. Be sure to click **Save Budget** as you enter the Estimated Budget as to not lose your work.

9. If at any point you want to save your work and come back to the Estimated Budget, click **Save My Work**.

10. When you are done entering the Estimated Budget, click **Submit**. Once the **Submit** button has been clicked, changes cannot be made.



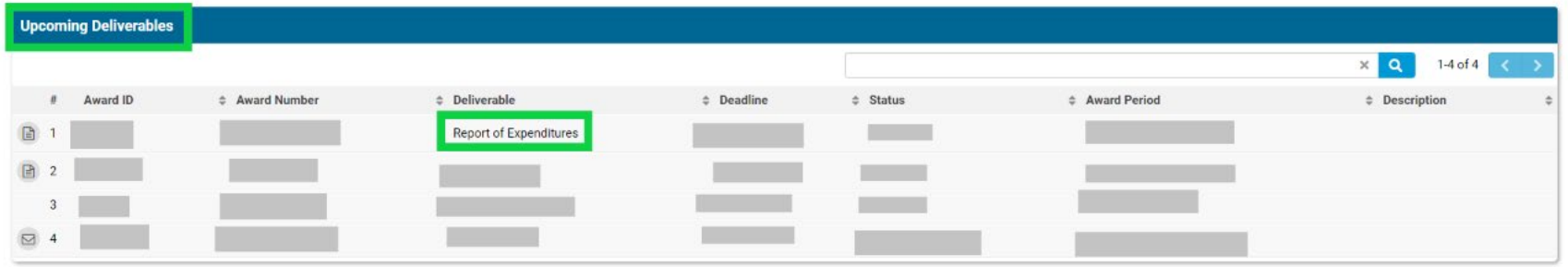
***Please see "How to Enter in Financial Reports" for further guidance on the submission of the Estimated Budget**

CYSTIC FIBROSIS FOUNDATION®

How to Enter in a Report of Expenditures (ROE):

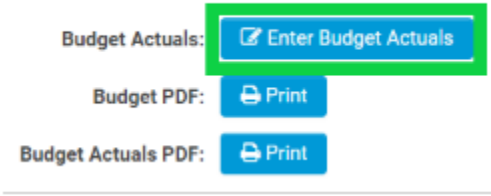
1. Principal Investigators (PIs) can locate any Upcoming Deliverables within the **Upcoming Deliverables** button under **My Activities**

2. Once inside the **Upcoming Deliverables,** you will see outstanding deliverables for all awards accessible through the GMS in date order. Click the Report of Expenditures deliverable.

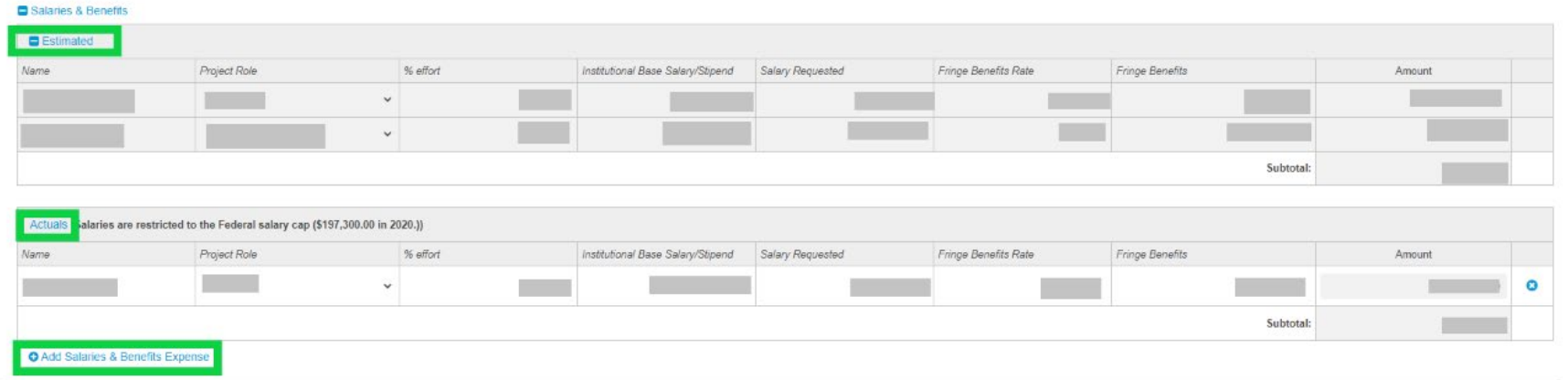


3. You can then preparing the ROE by clicking **Begin Preparation**

4. By clicking **Enter Budget Actuals** you can show what amount of the Estimated Budget funds were used



5. In entering the Budget actuals, please be sure to add actual expenses in the corresponding budget section under “Estimated”. The ROE sections will be pre-populated with the corresponding Estimated Budget projections. To add line items in the different sections of the **Estimated Budget**, click the blue plus sign **(+)** next to **Add [Section Name]**



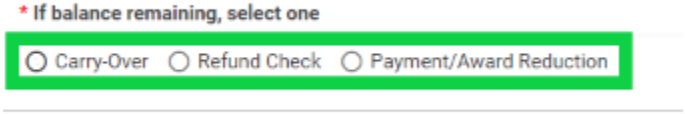
6. At the bottom of the Budget Actuals, you will see a breakdown of the total expenses actually used, the estimated expenses, the total to be reported, and the variance between the amount to be reported and the total actual expenses.

7. Be sure to click **Save Budget** as you enter the Estimated Budget as to not lose your work.

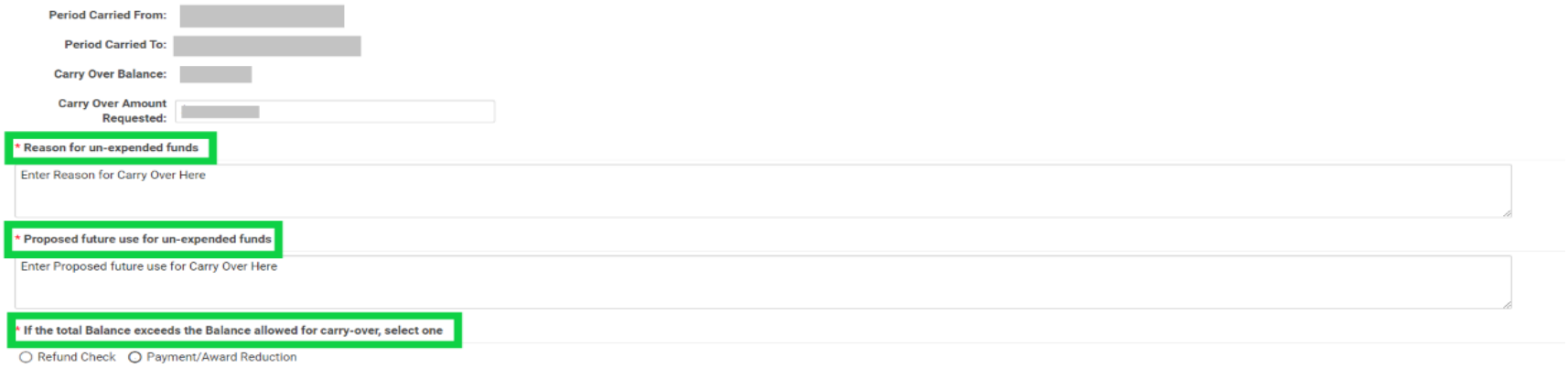
8. Click **Save My Work** along the way to ensure you keep the data previously entered.

9. When you are finished filling out the ROE, click **Continue**

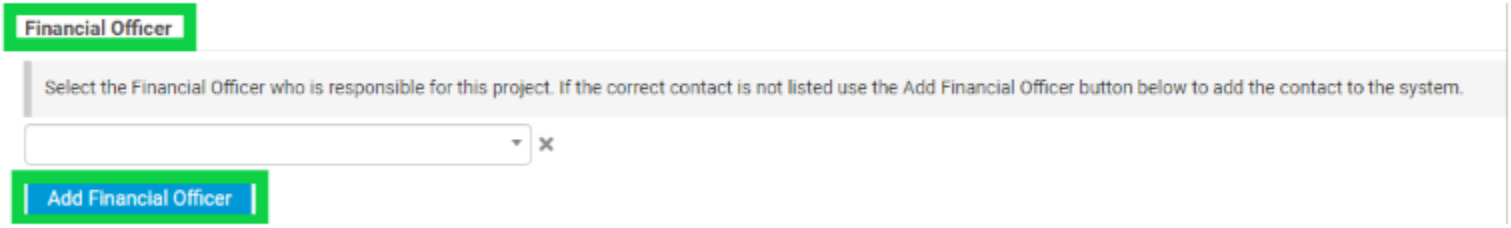
10. Here you may choose how your institution wishes to receive the remaining balance of the award (if applicable): Carry-Over, Refund Check, or Payment/Award Reduction



11. If you choose the Carry-Over option, you will need to explain the reason for un-expended funds. If the total Balance exceeds the carry over limit, you will need to choose how to address the discrepancy. You can receive a refund check or a payment/award reduction.

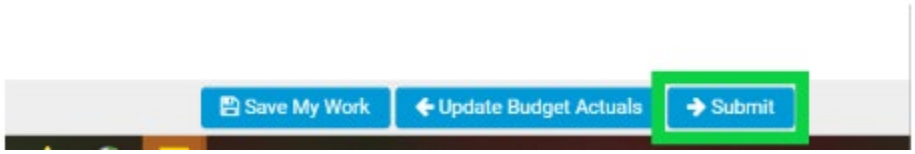


12. Next, add the Financial Officer who needs to review and approve the ROE for your institution. If the Financial Officer needs to be added, click **Add Financial Officer** to give them access to the ROE.



13. If at any time, you need to navigate away from the ROE but are not ready to submit the report, click **Save My Work**

14. When you are ready to submit the Report of Expenditures for the CF Foundation Grants & Contracts office to review and approve click **Submit**. Once the **Submit** button has been clicked, changes cannot be made.

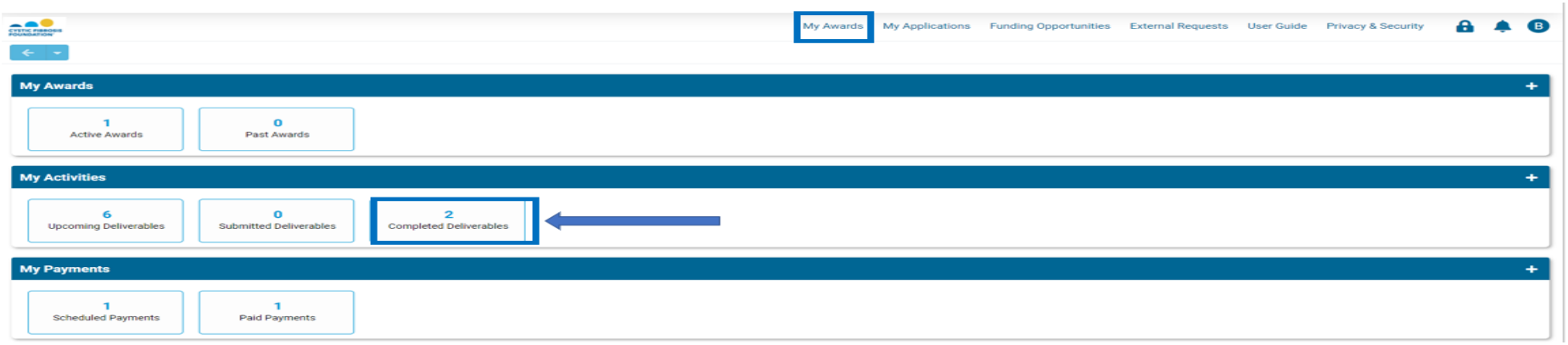


***Please see "How to Enter in Financial Reports" for further guidance on the submission of the Report of Expenditures (ROE)**

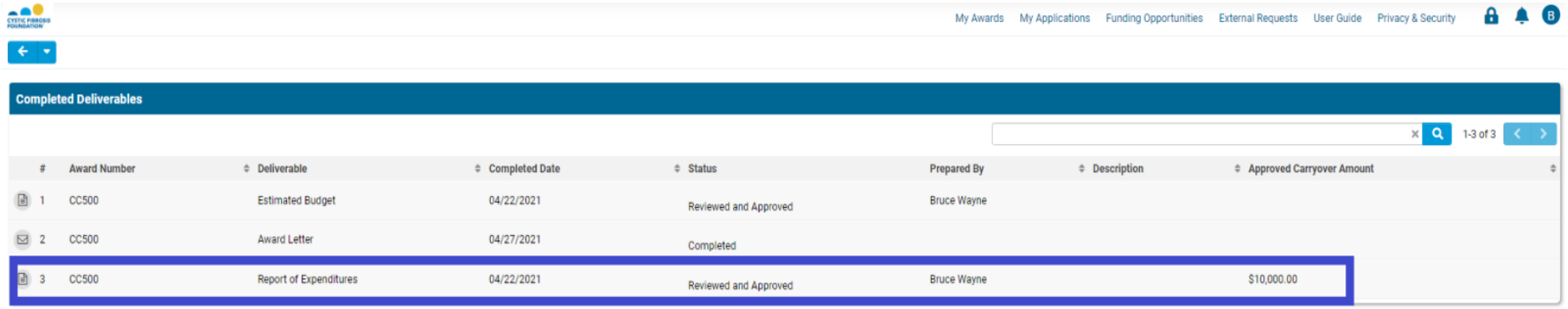
CYSTIC FIBROSIS FOUNDATION®

How to View Approved Report of Expenditures/Carryovers:

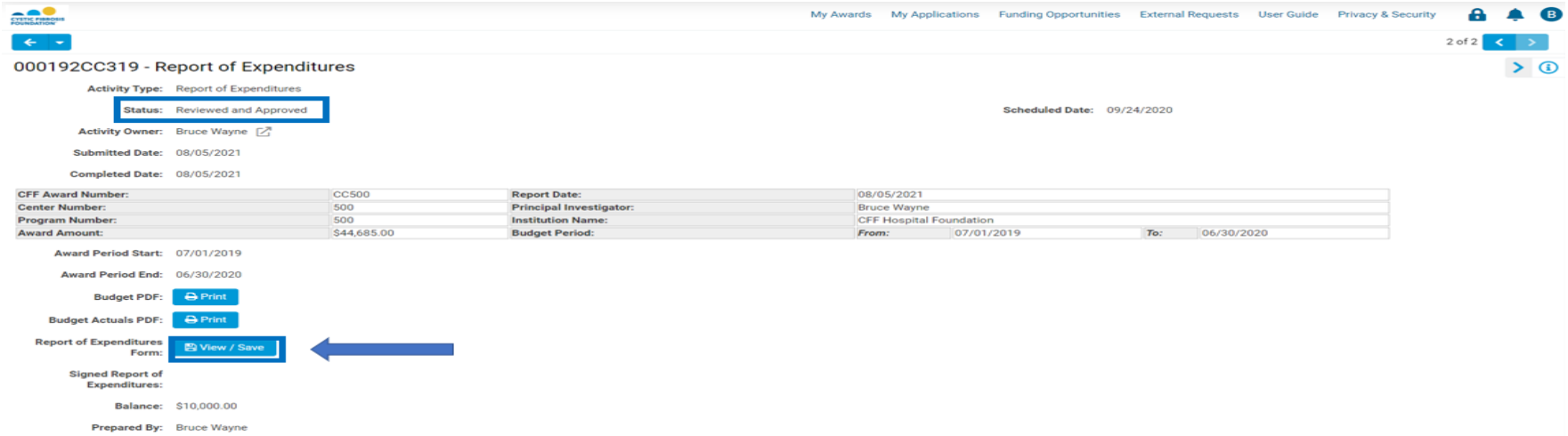
1. You may find all your approved deliverables and financial reports by clicking on **Completed Deliverables** under **My Activities**. PLEASE NOTE: You will only be able to view deliverables associated to an Award if the **Principal Investigator** has added you as a contact to their award (Refer to "How to Add Contacts")



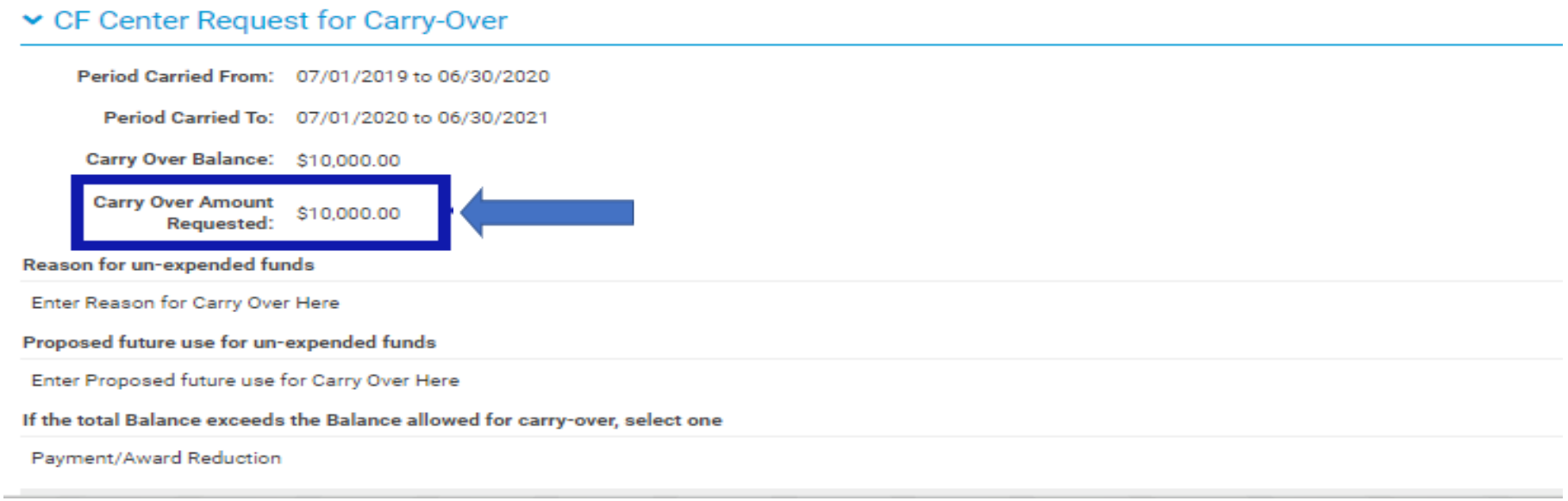
2. On the **Completed Deliverables** page, you will find all completed deliverables for a given award. Click on **Report of Expenditures** of choice to view the carryover amount reviewed and approved. You can also view the Approved Carryover Amount under the **Approved Carryover Amount** coloumn.



3. To download the approved Report of Expenditure, click the **Print** button next to **Budget Actuals PDF.**



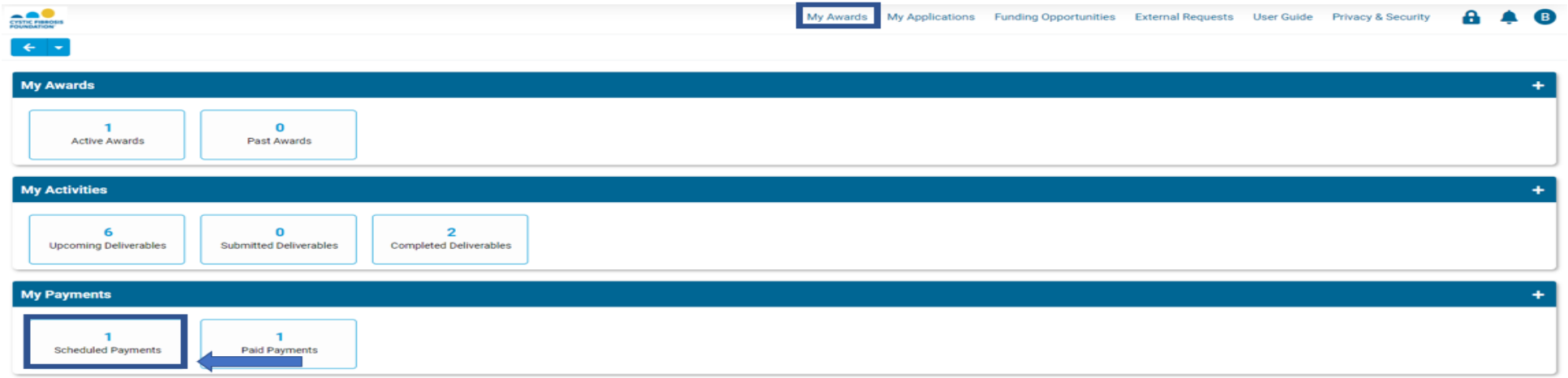
4. To view your approved **Carry Over Amount**, scroll down to the bottom of the **Report of Expenditures** page. The **Carry Over Amount Requested** is the amount that has been approved.



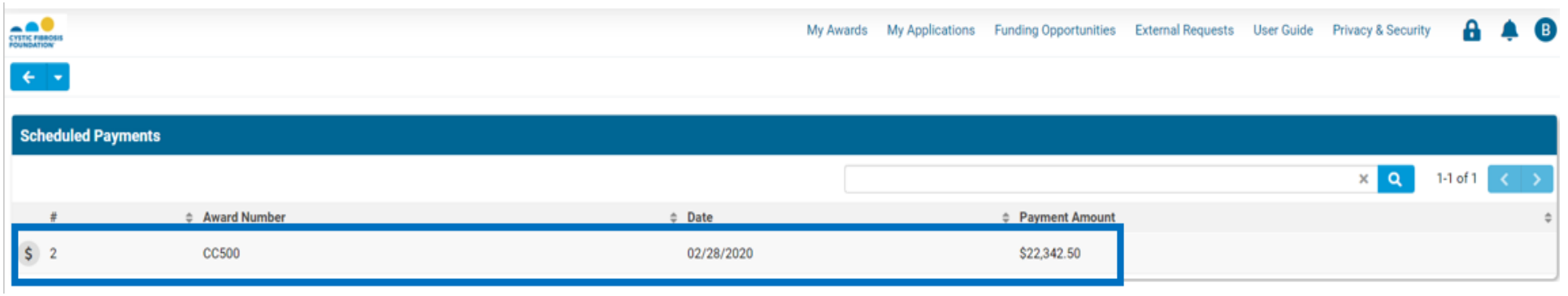
CYSTIC FIBROSIS FOUNDATION®

How to View Payments in the System and Associated Contingent Deliverables:

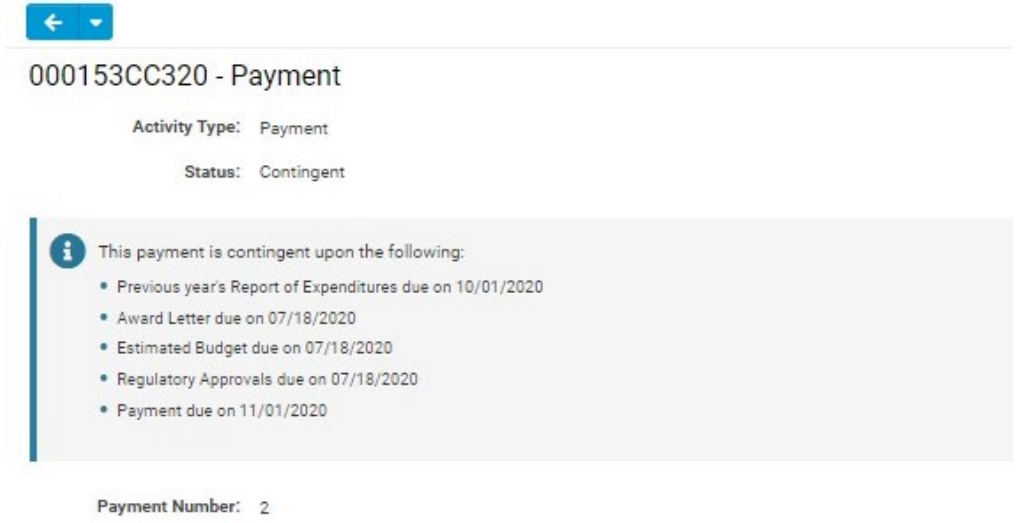
1. Log into https://awards.cff.org/
2. On the **My Awards** Dashboard, Click on **Scheduled Payments** under **My Payments**



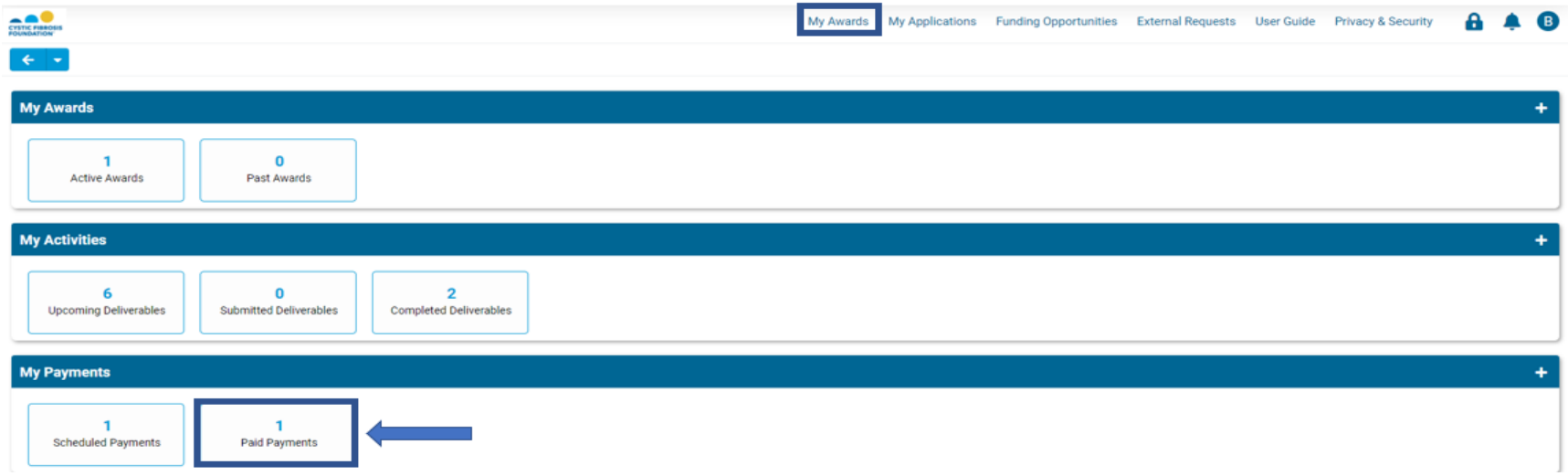
3. On the Scheduled Payments page, you can view all scheduled payments for the Award for which you are affiliated. You must first be added as a contact to an award to see the payments. (For more information, see "How to Add Contacts").



4. Once you click on a **Scheduled Payment**, the system will display the deliverable(s) associated with that payment that remain to be completed by the awardee before the payment can be scheduled. Associated payment(s) will remain contingent upon receipt and approval of the deliverable(s). All deliverable(s) received after the deadline will be queued for review and approval. Payment(s) will be released in the payment cycle following approval of deliverable(s).



5. You may also view all previously paid/issued payments by clicking on **Paid Payments** under **My Payments.**

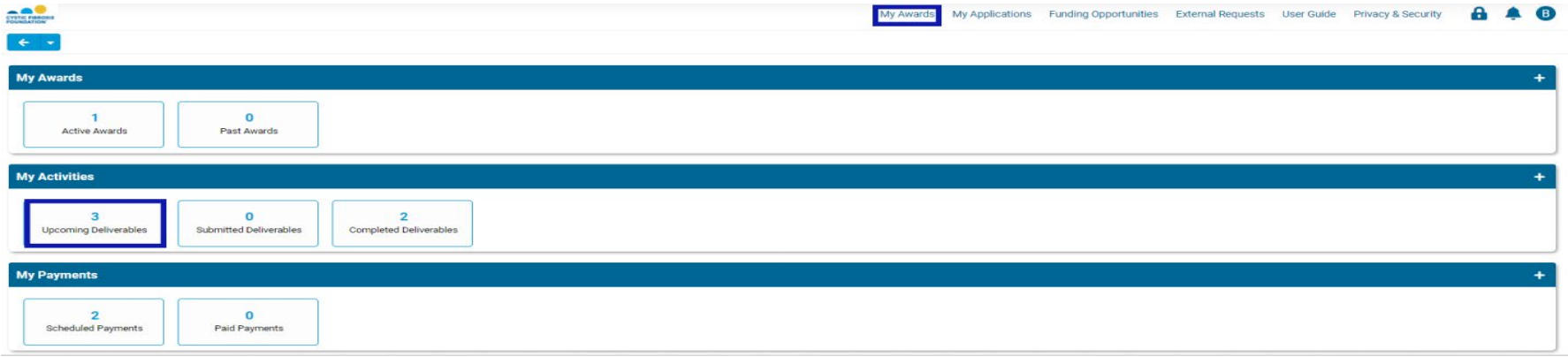


CYSTIC FIBROSIS FOUNDATION®

How to Complete the Renewal Budget & Progress Report:

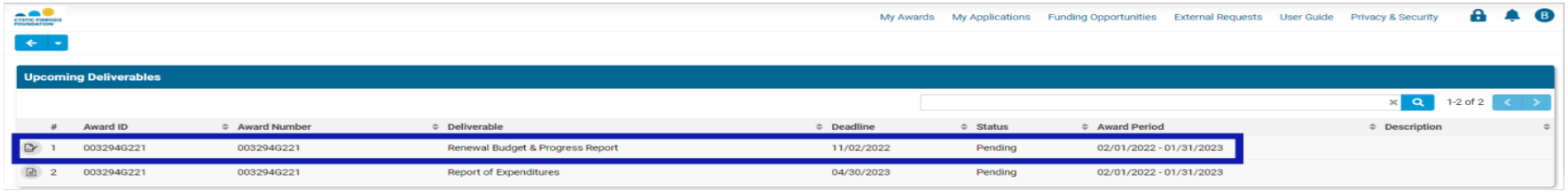
1. All pending deliverables, including your financial reports, can be found by clicking on **Upcoming Deliverables** under **My Activities**.

   PLEASE NOTE: You will only be able to view deliverables associated to an Award if the **Principal Investigator** has added you as a contact to their award (For more information, see refer to the guide **"How to Add Contacts"**)

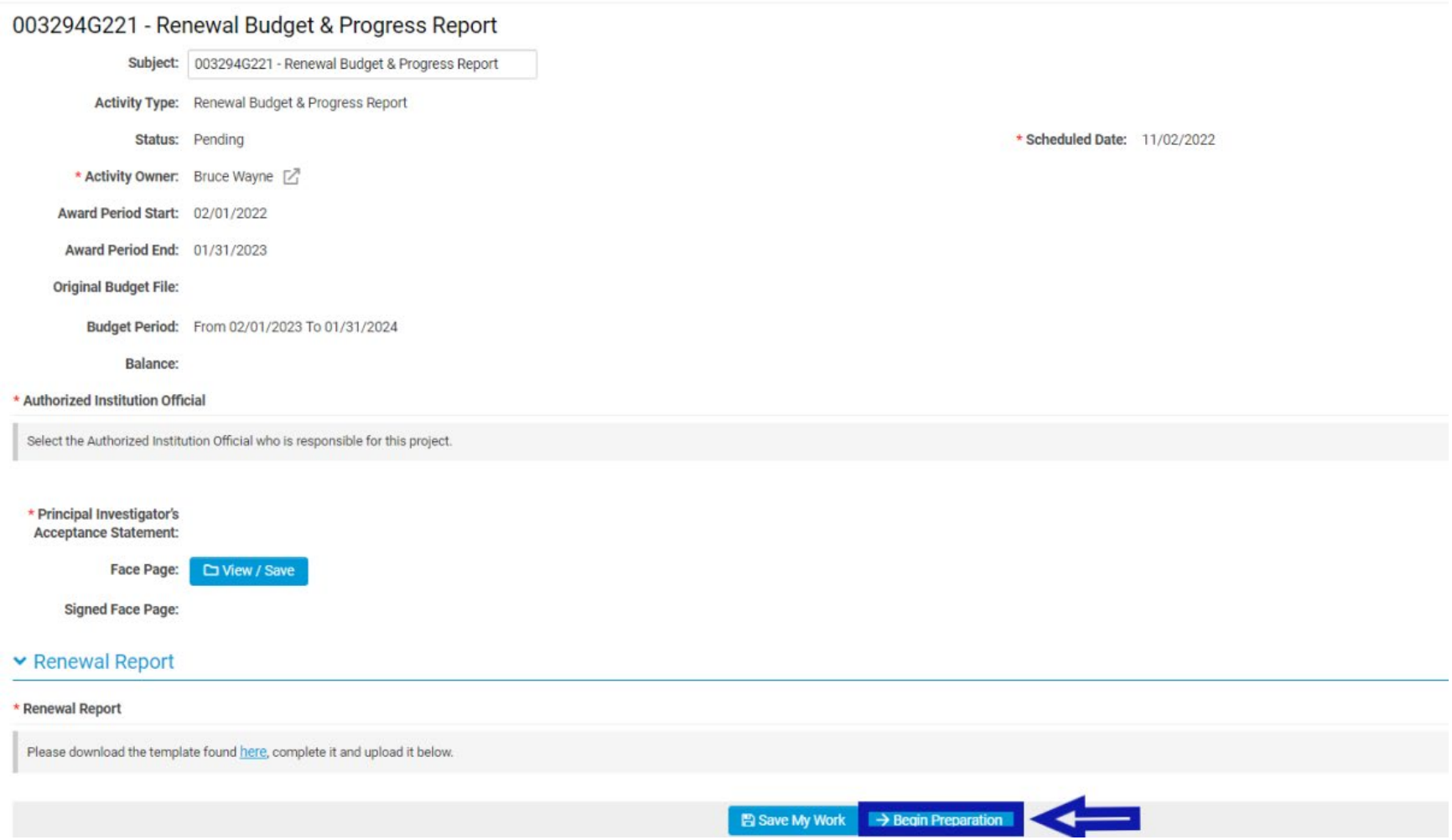


2. The Upcoming Deliverables page lists all outstanding deliverables for a given award. To begin, click on the **Renewal Budget & Progress Report.**

   PLEASE NOTE: Some Awards might have the **"Renewal Budget"** Deliverable listed instead of **"Renewal Budget & Progress Report"**. The **"Renewal Budget"** Deliverable will still include the Progress Report.



3. On the Renewal Budget & Progress Report page, click on **Begin Preparation** to begin. This will change the status of the Renewal Budget & Progress Report to **"In Progress"**.



4. When the status of the Renewal Budget & Progress Report is in "**In Progress**" status, only the Principal investigator can enter in the Renewal Budget and Budget Justification. For support staff to **receive access** to the Renewal Budget and Budget Justification, the Principal Investigator must add the contact associated to the award to the **Budget Access** section. When the contact is added to the Budget Access section, the Principal Investigator must click **Save My Work**. This will allow for the contact added to the Budget Access section to edit and work on the Renewal Budget and Budget Justification.

   PLEASE NOTE: You will only be able to view deliverables associated to an Award only if the **Principal Investigator** has added you as a contact to their award (For more information, see refer to the guide **"How to Add Contacts"**)

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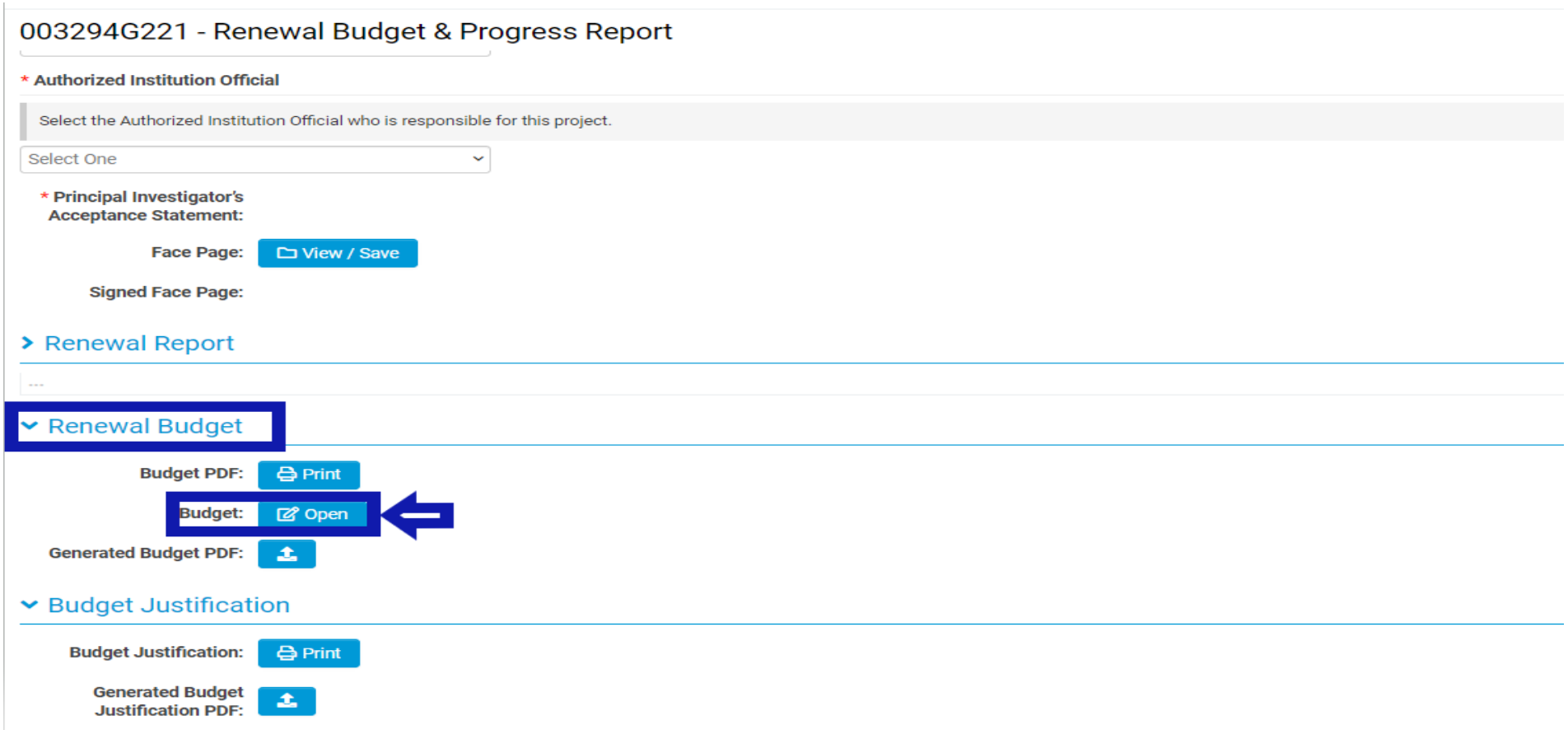
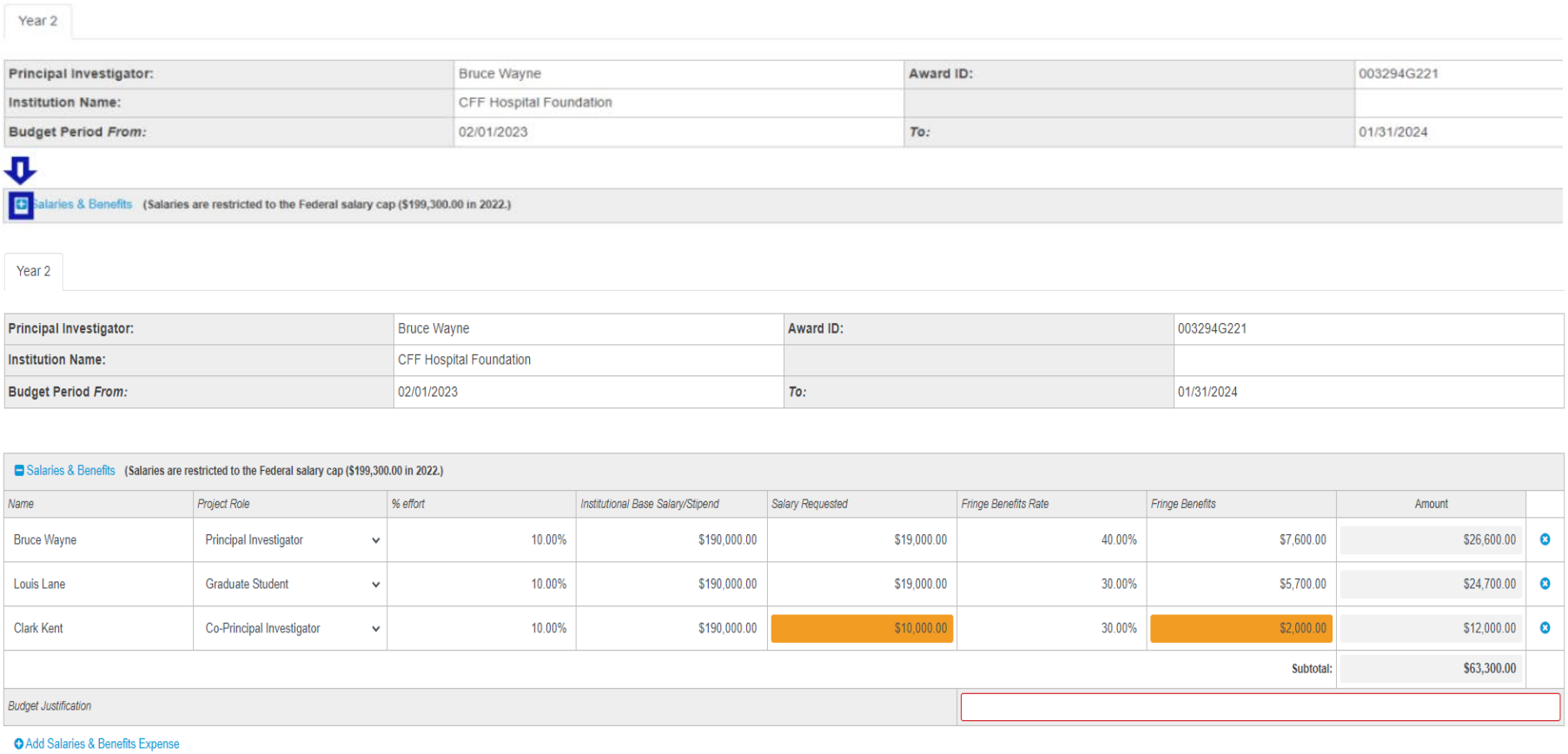
How to Enter in the Renewal Budget & Budget Justification:

1. When the status of the Renewal Budget & Progress Report is in "**In Progress**" status, the Principal Investigator or any contact associated to the award that has been granted **Budget Access will be able to work on the Renewal Budget and Budget Justification.**
2. To begin, click on the **Open** button next to **Budget** under the **Renewal Budget** tab:



3. By clicking on **Open**, a pop-up window will appear for the Renewal Budget. In this window, the Principal Investigator or any contact associated to the award that has been granted Budget Access will be able to enter in the Budget for the Renewal Period. To enter in the Budget for the Renewal Period, **click on the + Sign** next to each Budget category to open the Budget Category line-items.

   PLEASE NOTE: The **Renewal Budget** automatically populates based on the information submitted on the original **Application Budget**. You may update each budget line-item, if necessary, by editing the information in each budget cell.



Year 2

Principal Investigator:	Bruce Wayne	**Award ID:**	003294G221
Institution Name:	CFF Hospital Foundation		
Budget Period *From:*	02/01/2023	***To:***	01/31/2024

Salaries & Benefits (Salaries are restricted to the Federal salary cap ($199,300.00 in 2022.)

Year 2

Principal Investigator:	Bruce Wayne	**Award ID:**	003294G221
Institution Name:	CFF Hospital Foundation		
Budget Period *From:*	02/01/2023	***To:***	01/31/2024

Salaries & Benefits (Salaries are restricted to the Federal salary cap ($199,300.00 in 2022.)

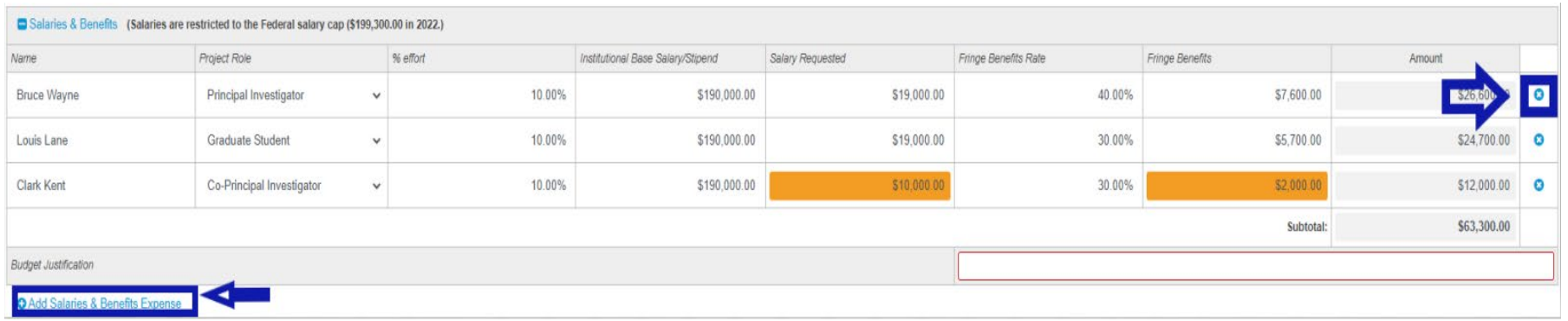
Name	*Project Role*	*% effort*	*Institutional Base Salary/Stipend*	*Salary Requested*	*Fringe Benefits Rate*	*Fringe Benefits*	Amount
Bruce Wayne	Principal Investigator	10.00%	$190,000.00	$19,000.00	40.00%	$7,600.00	$26,600.00
Louis Lane	Graduate Student	10.00%	$190,000.00	$19,000.00	30.00%	$5,700.00	$24,700.00
Clark Kent	Co-Principal Investigator	10.00%	$190,000.00	$10,000.00	30.00%	$2,000.00	$12,000.00
						Subtotal:	$63,300.00

Budget Justification

Add Salaries & Benefits Expense

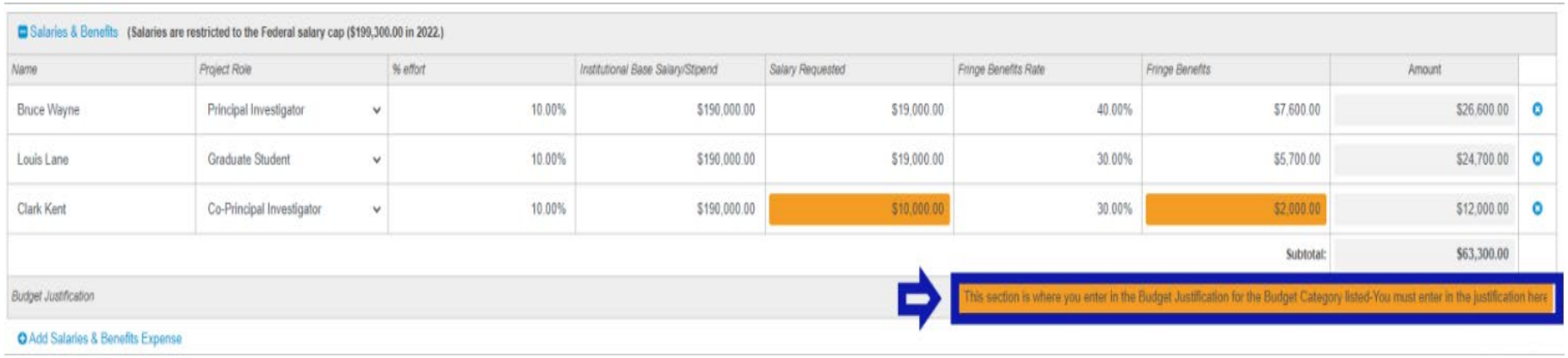
CYSTIC FIBROSIS FOUNDATION®

4. To **Delete** an Expense, click on the **X button** next to the line-item. To **Add** an Expense, click on the **+ Sign** under the Budget Category section.

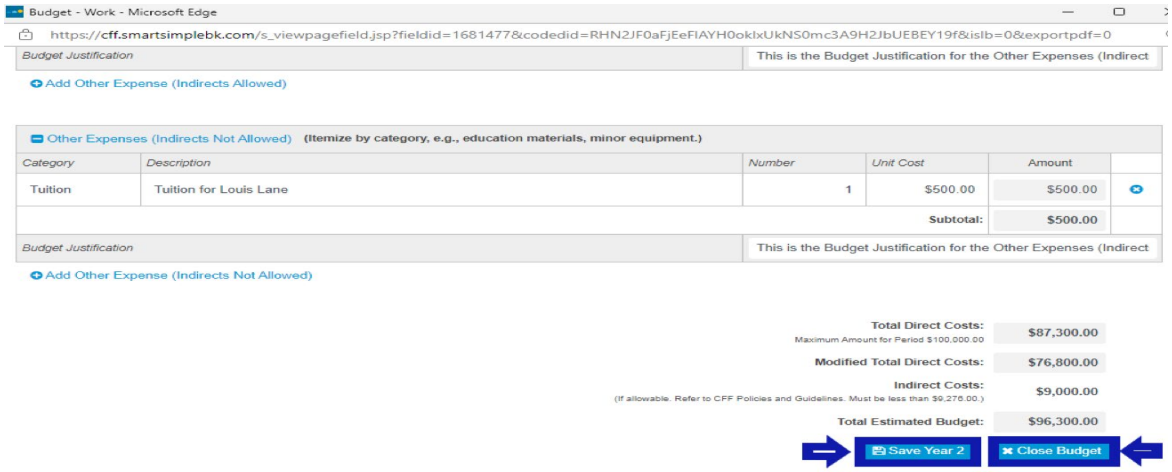


5. For the **Budget Justification**, there will be a **Text Box** available under each Budget Category section. To complete the Budget Justification, enter in the justification for each category in the Text Box. Click **Save** located at the bottom of the pop-up window to save the Budget and Budget Justification.

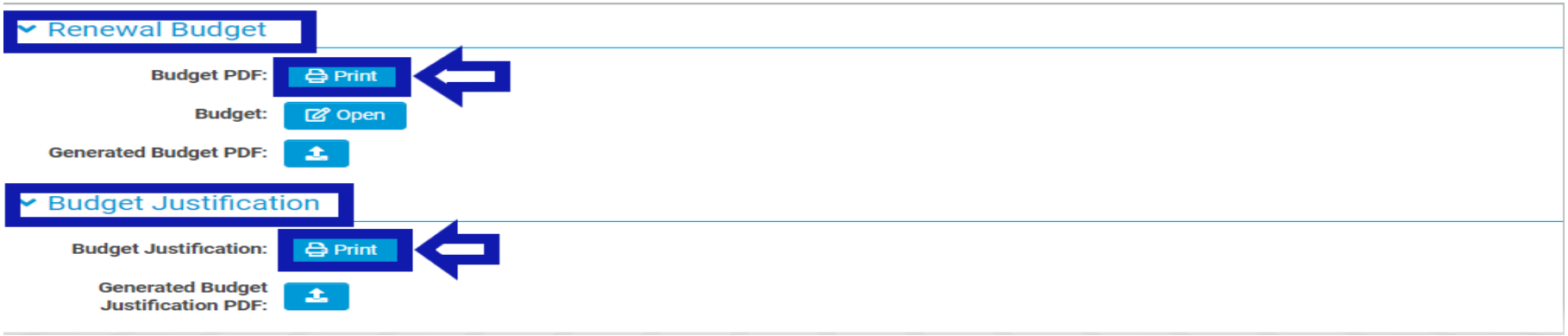
PLEASE NOTE: If you enter in any expenses into a Budget Category, you must enter in the justification for that category. The system will **not allow** you to submit the **Renewal Budget if the Budget Justification Text Box is left blank.**



6. Once all the Renewal Period Expenses and the Budget Justification for each Budget Category have been entered in, Click **Save** at the bottom of the Budget window to save the Renewal Budget information. **If allowable (see RFA Guidelines)**, please complete the Indirect Costs field. Click **Close Budget** to close the pop-up window.



7. **To view the entire Renewal Budget as a PDF,** click Print next to Budget PDF under the Renewal Budget tab. To view the entire Budget Justification as a PDF, click Print next to Budget Justification under the Budget Justification tab.



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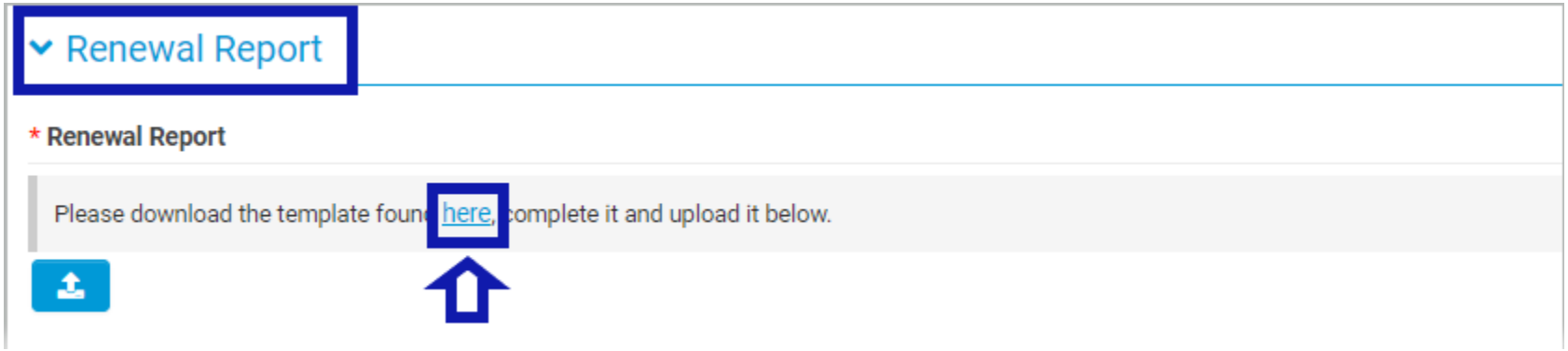
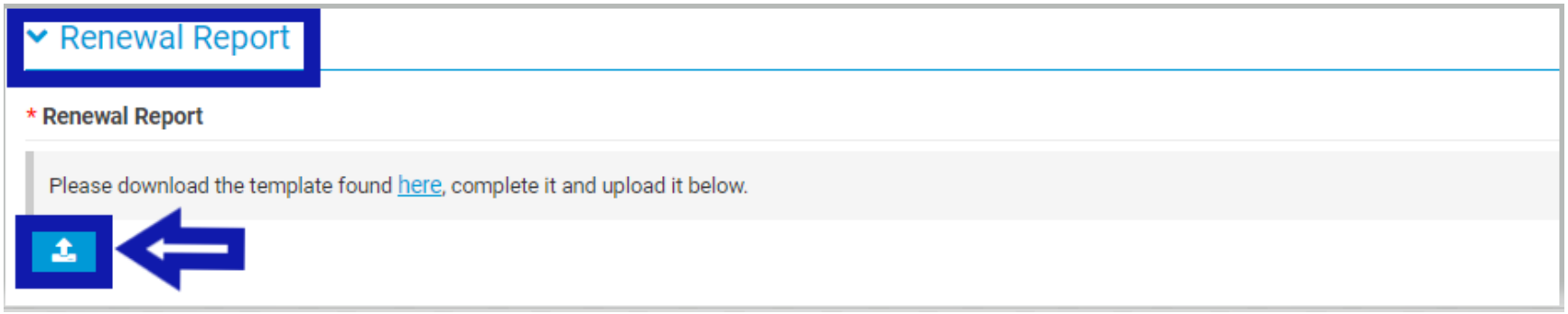
How to Submit the Renewal Report:

1. To submit the **Renewal Report**, download the template located under the **Renewal Report** tab.



2. A word document labeled Renewal-Progress-Report-CFF-GMS will be downloaded. The document provides instructions for the Renewal Progress Report and should be used as a template to complete the Renewal Progress Report. **To submit the Renewal Progress Report**, upload the completed copy of the Renewal Progress Report by clicking on the Upload button under the Renewal Report tab.



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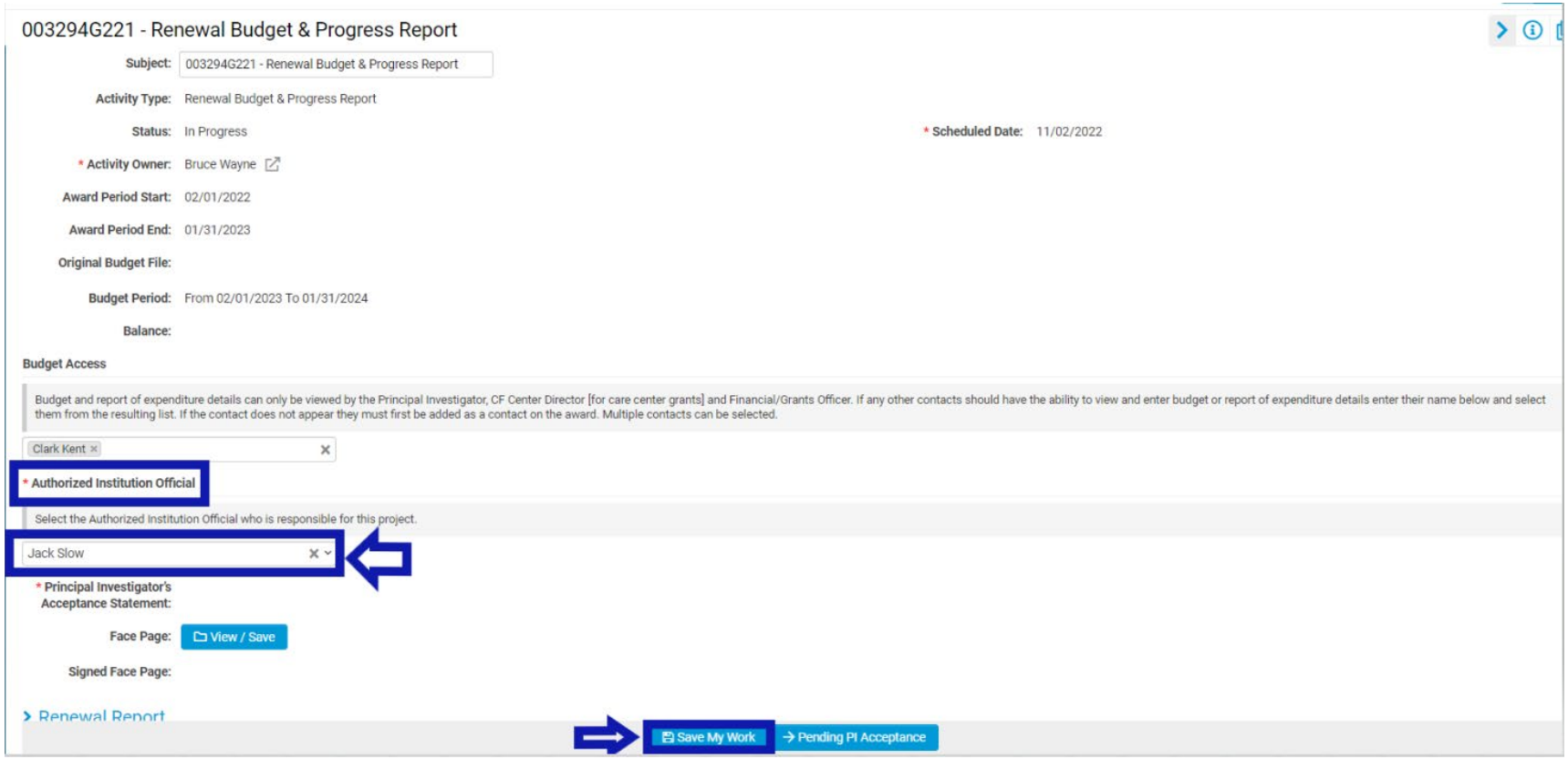
How to submit the final Renewal Budget and Report to CFF:

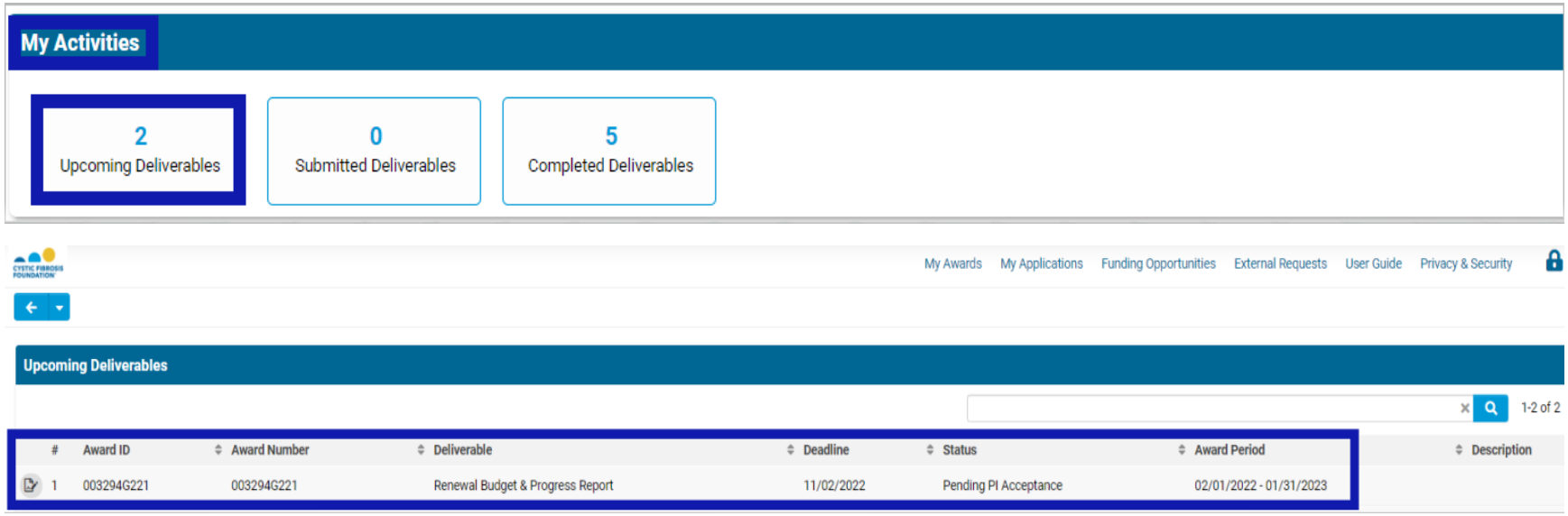
1. After the Renewal Report, Renewal Budget and Budget Justification have been completed, **enter in the Authorized Institutional Official** under the Authorized Institutional Official search box. Click Save My Work once the Authorized Institutional Official has been entered.

   PLEASE NOTE: The Authorized Institutional Official will only appear if that contact has been associated to the award. (For more information, refer to the guide **"How to Add Contacts"**)

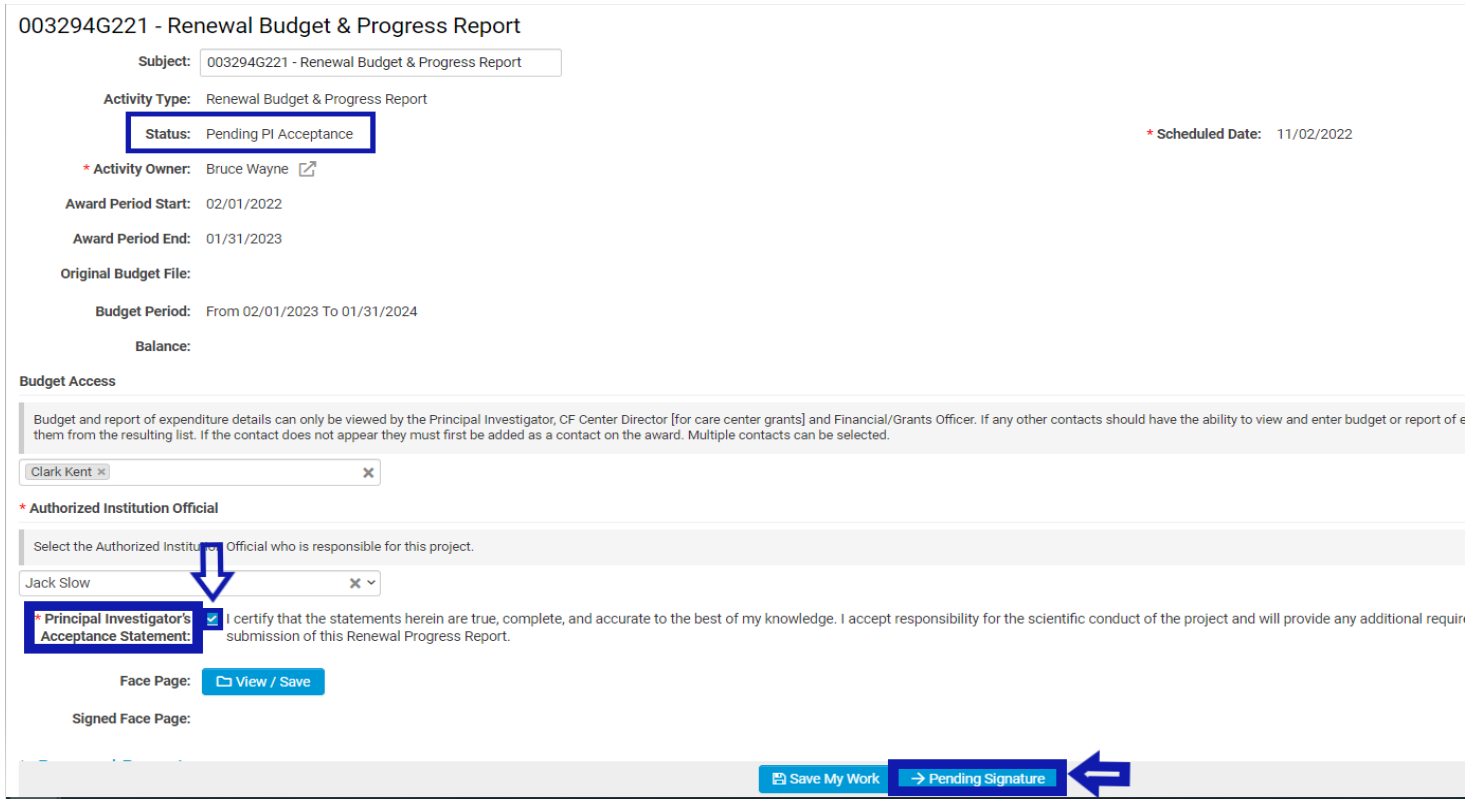


2. After the Renewal Budget & Progress Report has been saved, click **Pending PI Acceptance** to move the Renewal Budget & Progress Report forward. This will move the status of the Renewal Budget & Progress Report from "**In Progress**" to "**Pending PI Acceptance**".

3. In **Pending PI Acceptance** status, the Principal Investigator must log in, **click on Upcoming Deliverables under My Activities**, and select the Renewal Budget & Progress Report that has the status "**Pending PI Acceptance**".



4. On the Renewal Budget & Progress Report page, the Principal Investigator can review the Renewal Report, Renewal Budget and Budget Justification and make any edits if necessary. To submit the Renewal Budget & Progress Report, the Principal Investigator must provide their approval by **clicking the check box next to** the Principal Investigator's Acceptance Statement. Once the check box has been marked, the Principal Investigator can submit the entire Renewal Budget & Progress Report for signature by **clicking on the Pending Signature** button.



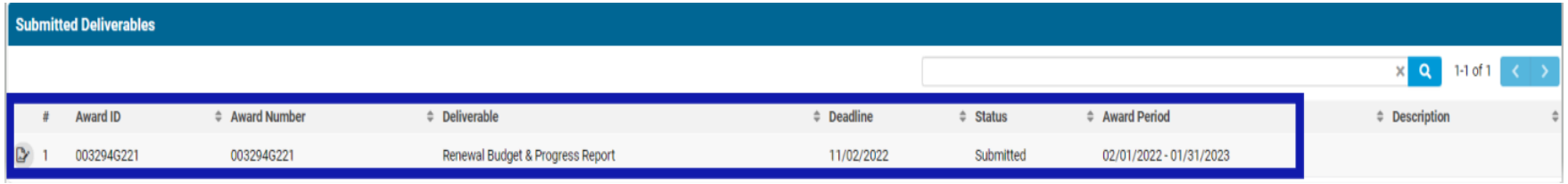
Renewal Budget & Progress Report Review Process:

1. The status of the Renewal Budget & Progress Report will move from "Pending PI Acceptance" to "Pending Signature" once the Principal Investigator clicks on the Pending Signature button. **In Pending Signature status, the Renewal Budget & Progress Report will go through the Adobe Signature process outside of the Grants Management System.**

2. Adobe Signature will first route the entire Renewal Budget & Progress Report to the **Principal Investigator's email inbox for e-signature.** Once the Principal Investigator provides their e-signature through the Adobe Signature email, Adobe Signature will route the entire Renewal Budget & Progress Report to the **Authorized Institutional Official' s email inbox for e-signature.** When the Authorized Institutional Official provides their e-signature, the Renewal Budget & Progress Report will move from Pending Signature status to **Submitted** status on the Grants Management System.

3. **To view the submitted Renewal Budget & Progress Report,** click on Submitted Deliverables under the My Activities tab.

4. Click on the Renewal Budget & Progress Report in Submitted status.



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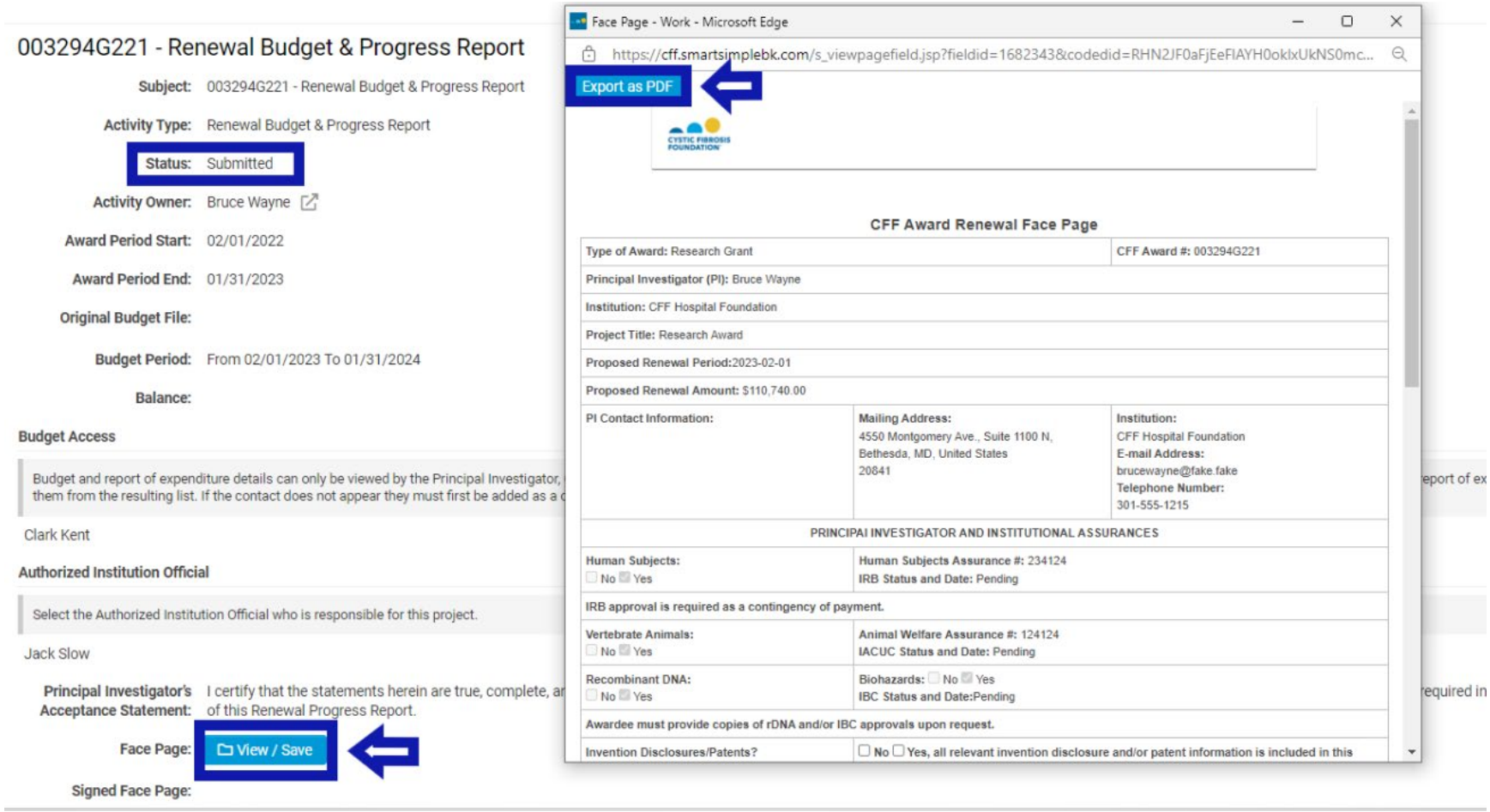
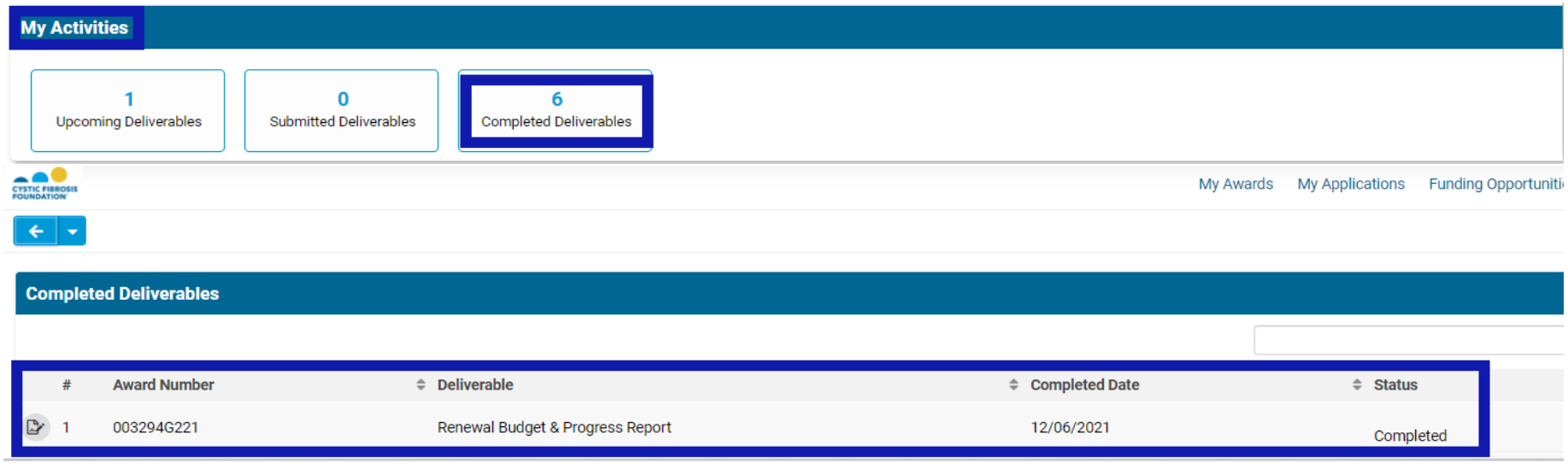
5. On the Renewal Budget & Progress Report page, **click on the View/Save button next to Face Page.** This will open a pop-up window labeled Face Page which will have the Principal Investigator and Authorized Institutional Official e-signatures listed. To view the entire Renewal Budget & Progress Report which includes the Renewal Report, Renewal Budget, and Budget Justification, **click on the Export as PDF button on the top left corner of the pop-up window.**



Renewal Budget & Progress Report Review Process:

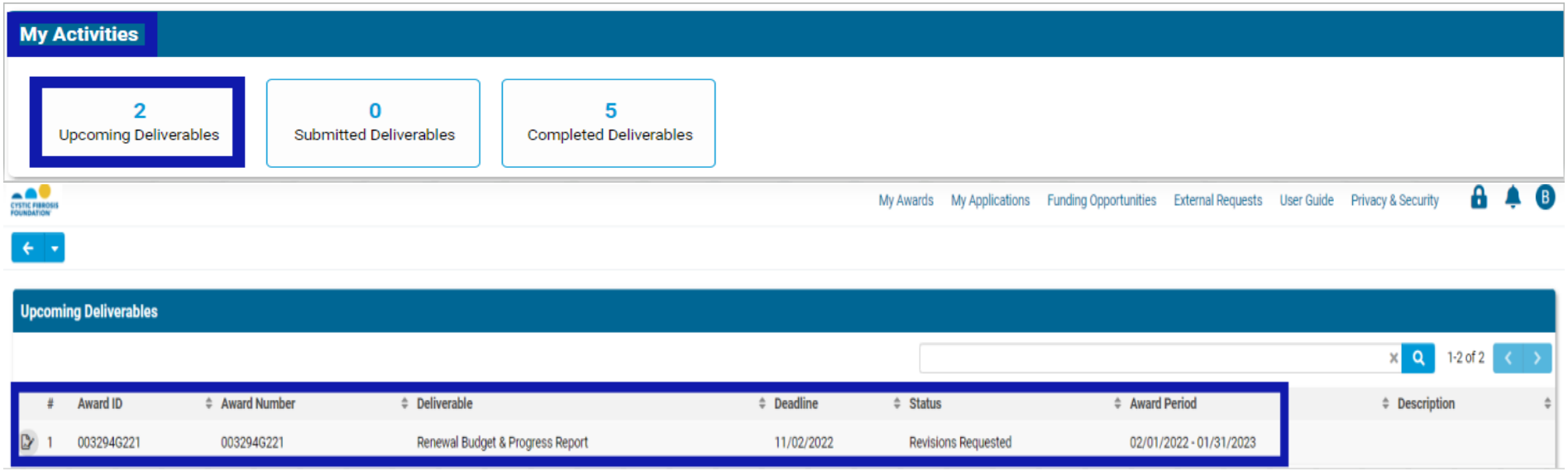
If Renewal Budget & Progress Report is Approved:

1. When the Renewal Budget & Progress Report is in Submitted status, the Renewal Budget & Progress Report will be reviewed by the CFF Program Officer and CFF Program Administrator associated to the award. **If approved by both the CFF Program Officer and CFF Program Administrator, the status of the Renewal Budget & Progress Report will move from Submitted to Completed status.** You will find the approved Renewal Budget & Progress Report in the Completed Deliverables section under My Activities. **An Award Letter for the Renewal Period will be issued out shortly after.** You will be able to view the Award Letter in the Upcoming Deliverables section under My Activities once it has been issued.



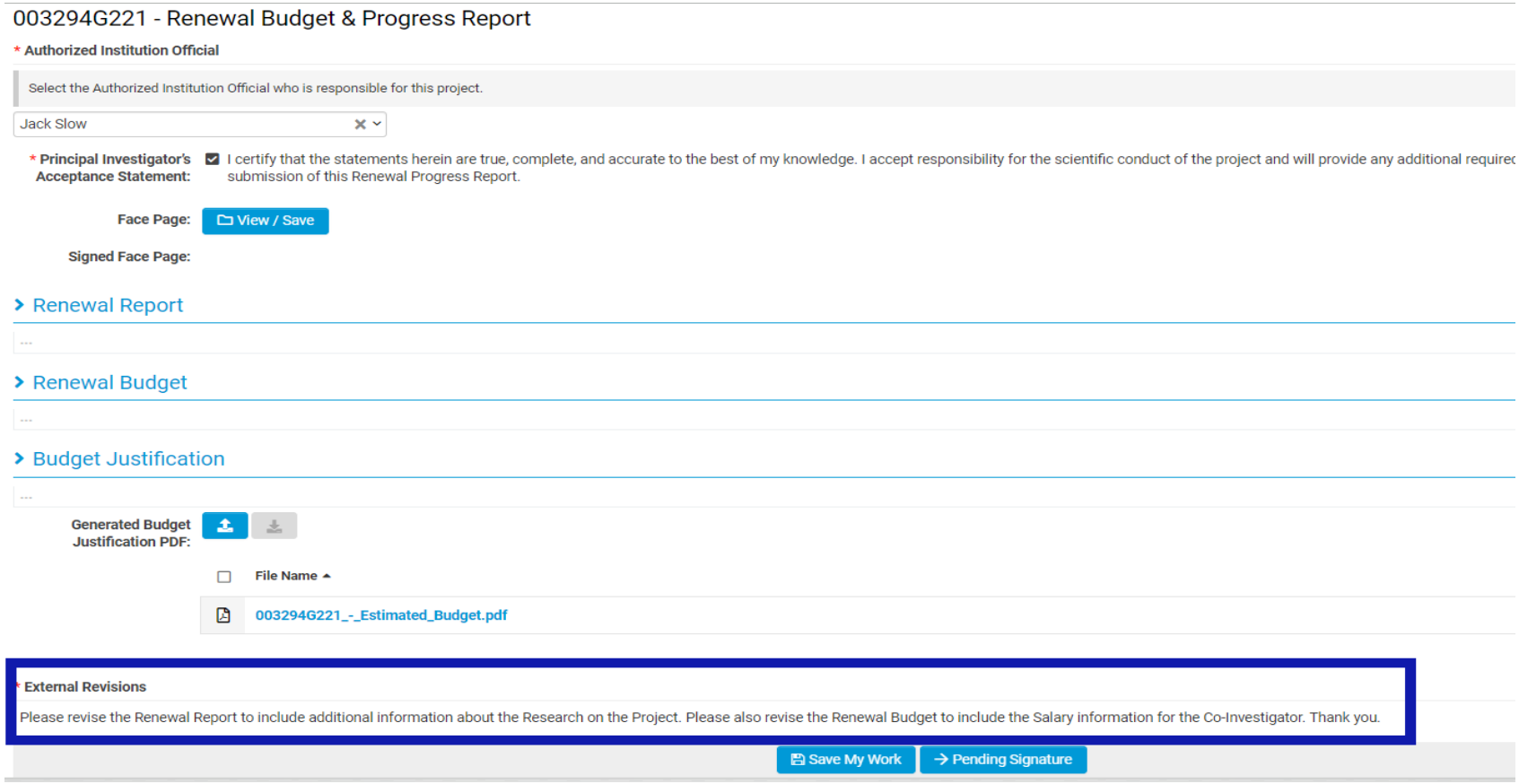
If Renewal Budget & Progress Report has Revisions Requested by CFF:

1. When the Renewal Budget & Progress Report is in Submitted status, the Renewal Budget & Progress Report will be reviewed by the CFF Program Officer and CFF Program Administrator associated to the award. **If revisions are being requested from CFF,** you will find that the Renewal Budget & Progress Report has reverted from Submitted status to Revisions Requested status. You can find the Renewal Budget & Progress Report with the Revisions Requested in the Upcoming Deliverables section under My Activities.



2. On the Renewal Budget & Progress Report page, the Principal Investigator **can find what revisions have been requested under the External Revisions** section on the bottom of the page.

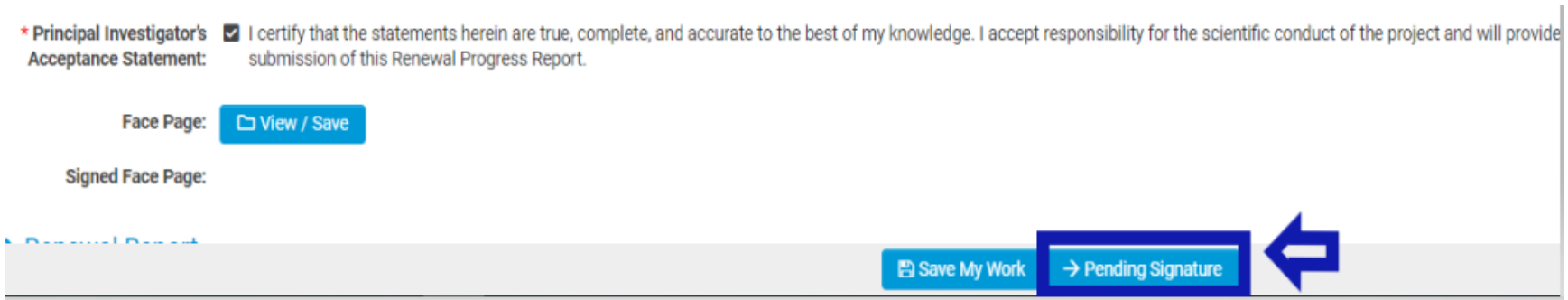
   PLEASE NOTE: External Revisions section is only viewable to the Principal Investigator.

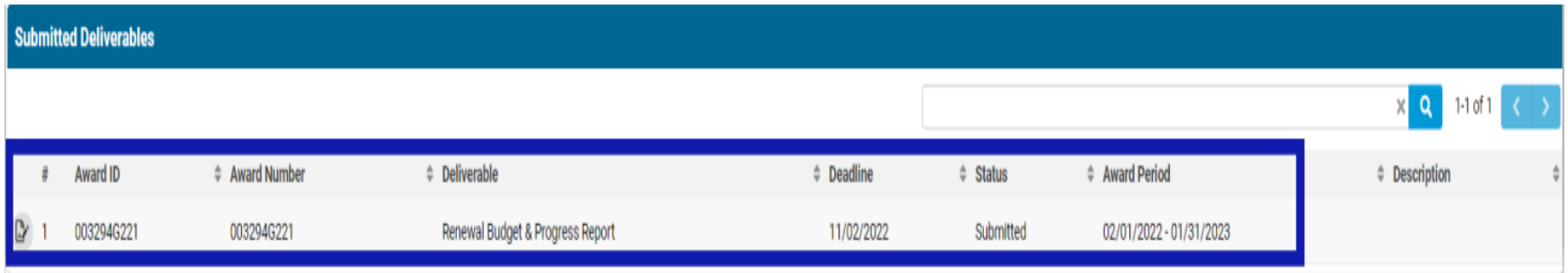


3. The Principal Investigator or any contact associated to the award that has been granted Budget Access can edit the Renewal Budget & Progress Report when the report is in Revisions Requested status. **After making all requested revisions** to the Renewal Budget & Progress Report, click **Save My Work** to save all the revisions.

   PLEASE NOTE: Only the Principal Investigator can see the External Revisions Requested section. If the Principal Investigator wants a contact with Budget Access to revise the Renewal Budget & Progress Report, the Principal Investigator must inform the contact with Budget Access what revisions are being requested by CFF.

4. To submit the Renewal Budget & Progress Report with all the completed revisions, the Principal Investigator will need to click on **Pending Signature** on the Renewal Budget & Progress Report page to submit the revised Renewal Budget & Progress Report. The report will go through the same signature process in Step 2 of "Renewal Budget & Progress Report Review Process."





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No-Cost Extension Requests (NCE)

In the event the research/project is not completed within the project period, a no-cost extension request (NCE) must be submitted in the Grants Management System **no sooner** than 90 days before the end of the project period. A no-cost extension may be requested only for the final funding year, and the requested end date may not exceed one (1) year from the current end date of the project. Multiple no-cost extensions may be considered based on the research involved. Approvals of no-cost extensions **are not guaranteed**, and failure to request a no-cost extension may result in the forfeiture of funds.

No-Cost Extension Status Quick Reference Guide

Status	Draft	Pending	In Progress	Pending PI Acceptance	Pending AIO Acceptance	Revisions Requested	Submitted	Pending PA Acceptance	Completed
Definition	NCE request is now created	NCE is pending submission	NCE is filled out but has not yet been submitted for the Principal Investigator's Approval	NCE is pending the Principal Investigator's Approval	NCE is pending the Authorized Institution Official's Approval	NCE has been reviewed by CFF and was sent back for revisions requested	NCE is submitted and pending CFF review	NCE is pending the Program Administrators (CFF) Approval	NCE has been reviewed and approved by CFF
Location of NCE Request	Request NCE	Pending NCE	Pending NCE	Pending NCE	Pending NCE	Pending NCE	Under Review NCE	Under Review NCE	Completed NCE

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No-Cost Extension Contact Permissions Quick Reference Guide

Status/Contact	Draft	Pending	In Progress	Pending PI Acceptance	Pending AIO Acceptance	Revisions Requested	Submitted	Pending PA Acceptance	Completed
Principal Investigator	View Edit	View Edit	View Edit	View Edit	View Only	View Edit	View Only	View Only	View Only
Co-Investigator	View Edit	View Edit	View Edit	View Only	View Only	View Edit	View Only	View Only	View Only
Coordinator	View Edit	View Edit	View Edit	View Only	View Only	View Edit	View Only	View Only	View Only
Post-Award Contact	View Edit	View Edit	View Edit	View Only	View Only	View Edit	View Only	View Only	View Only
Financial Officer	View Edit	View Edit	View Edit	View Only	View Only	View Edit	View Only	View Only	View Only
Grants Officer	View Edit	View Edit	View Edit	View Only	View Only	View Edit	View Only	View Only	View Only
Authorized Institution Official	View Edit	View Edit	View Edit	View Only	View Edit	View Edit	View Only	View Only	View Only

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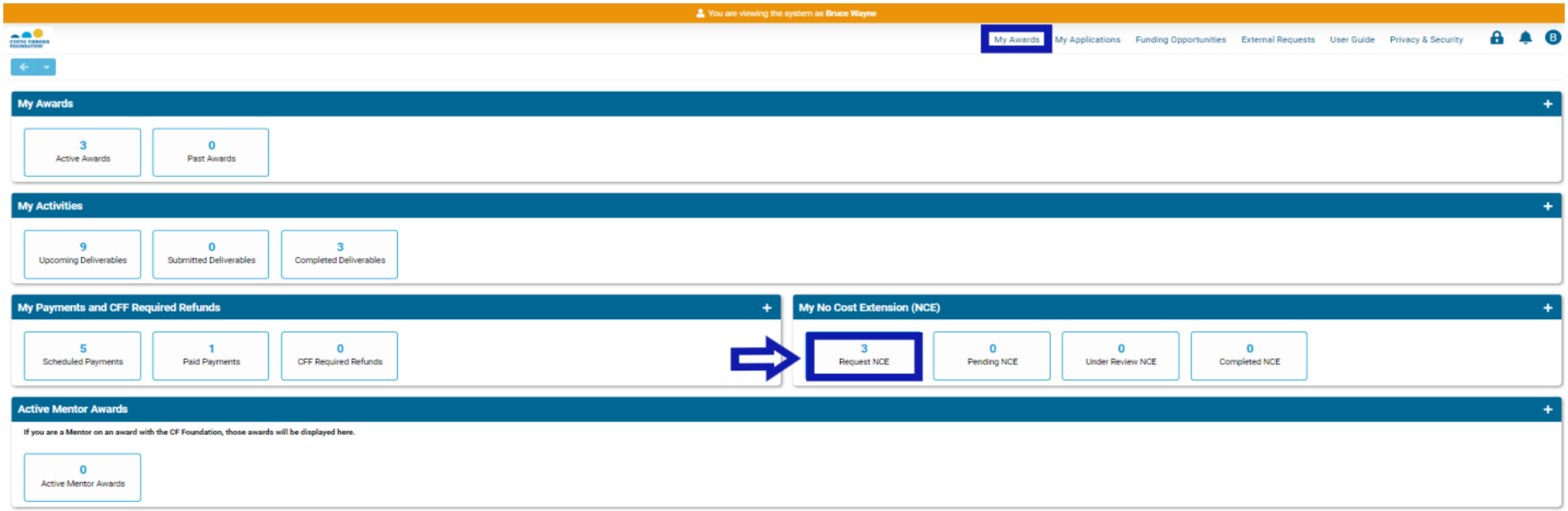
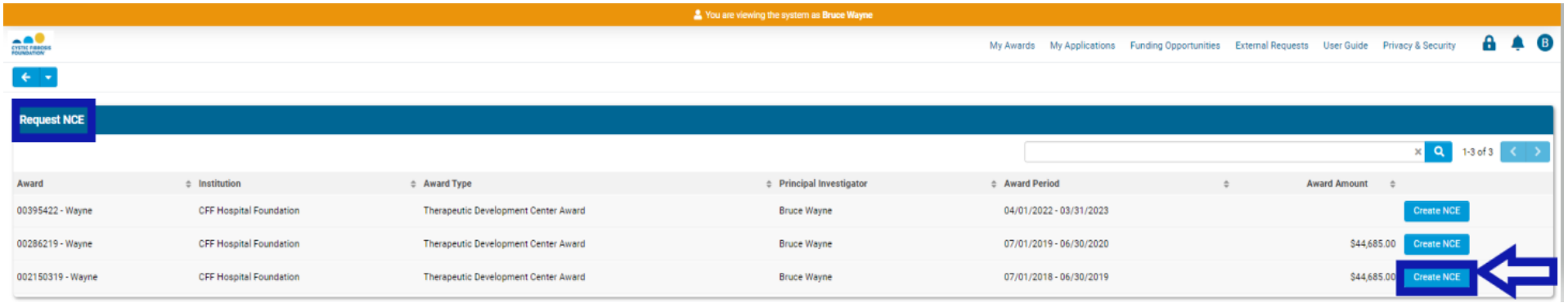
How to Request a No-Cost Extension:

1. To request a No-Cost Extension, go to the **My No Cost Extension (NCE)** module under the **My Awards** homepage and click on the **Request NCE** tile

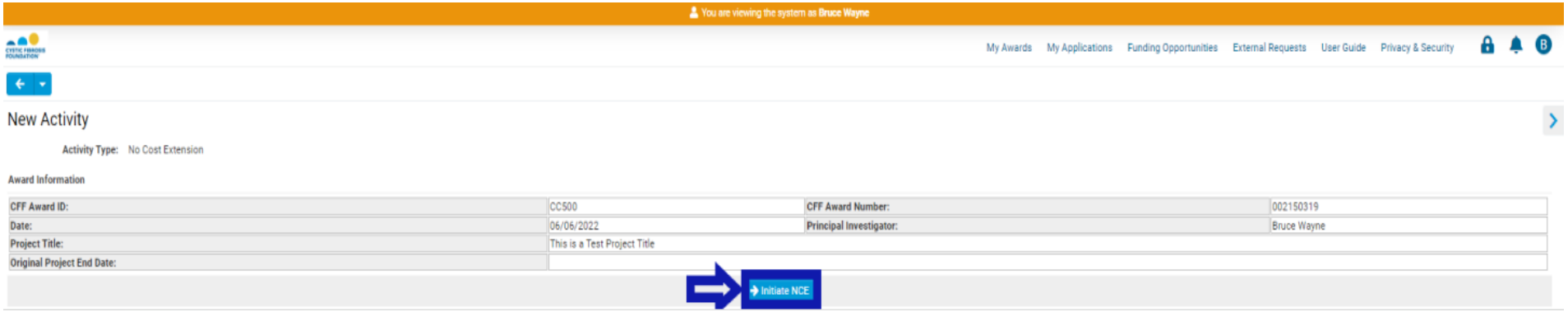


2. On the **Request NCE** page, you will find a list of all awards that you are associated with as a contact. Click the **Create NCE** button to create a No-Cost Extension request for that award.

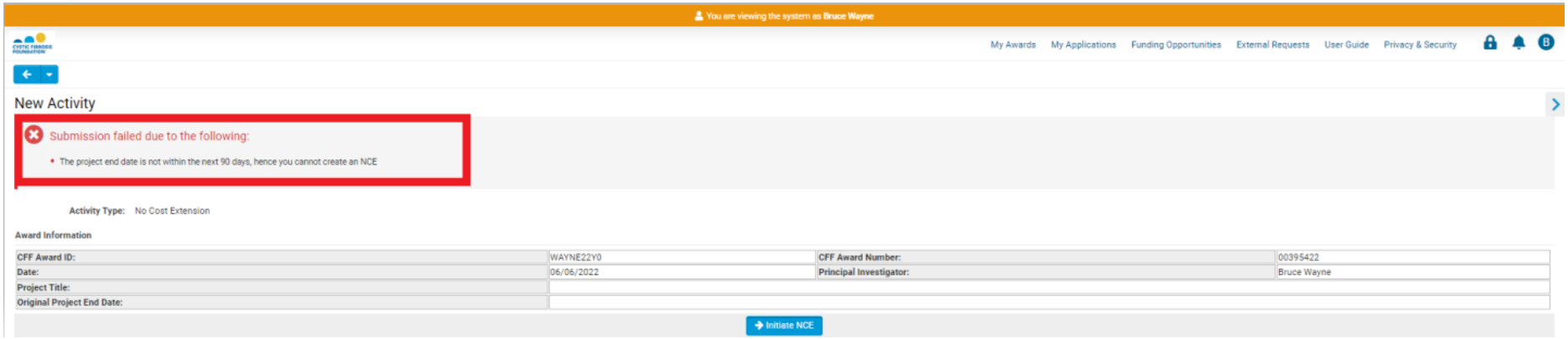
   PLEASE NOTE: You will only be able to view the award under the **Request NCE** tile only if the **Principal Investigator** of the award has added you as a contact to their award AND if you are a Post-Award contact listed on Page 2 of this guide. (For more information, see refer to the guide **"How to Add Contacts"**)



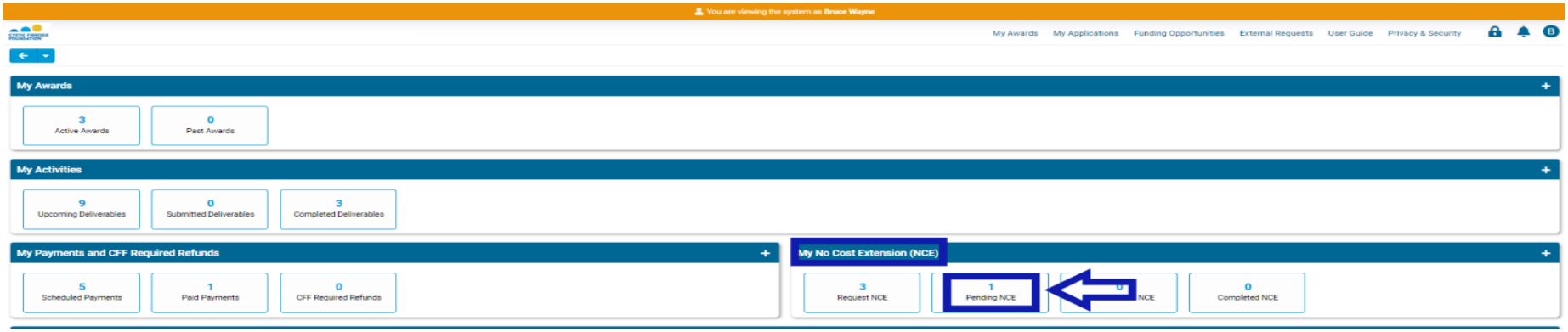
3. When you click on the **Create NCE** button, the system will create a No-Cost Extension request in **Draft** status. To start the No-Cost Extension request click on the **Initiate NCE** button.

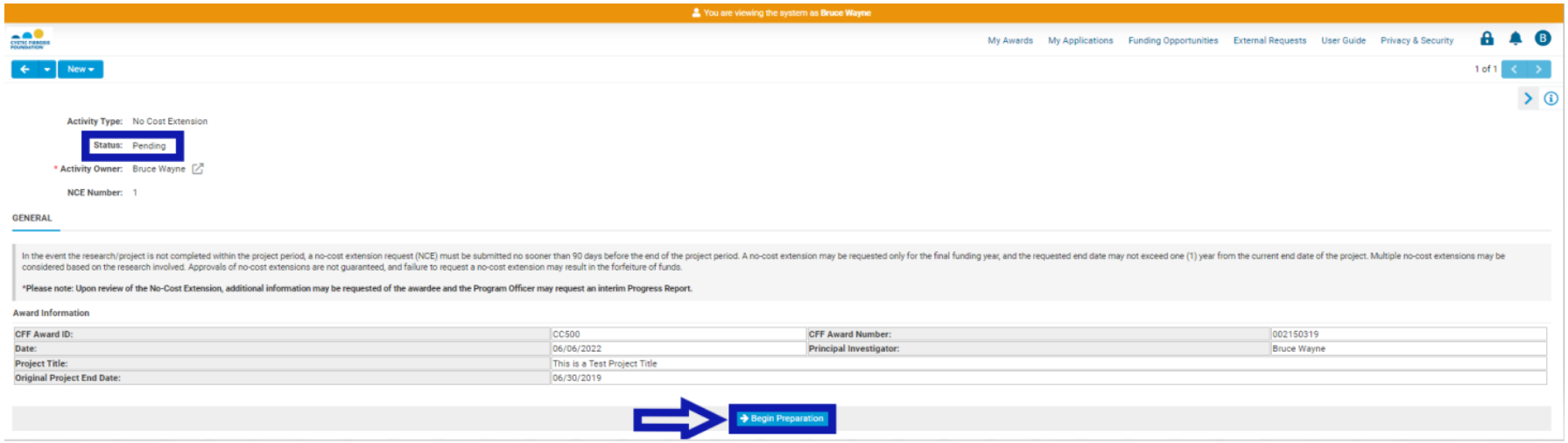


PLEASE NOTE: A No-Cost Extension Request (NCE) must be submitted **no sooner** than 90 days before the end of the project period. The system will validate the Project Period end date of the award when the No-Cost Extension Request is initiated. In the case that the No-Cost Extension request is initiated 90 days before the end of the Project Period, the system **WILL NOT** allow for the External User to begin the No-Cost Extension. The system will create an error message and will not allow the External User to initiate the No-Cost Extension request.

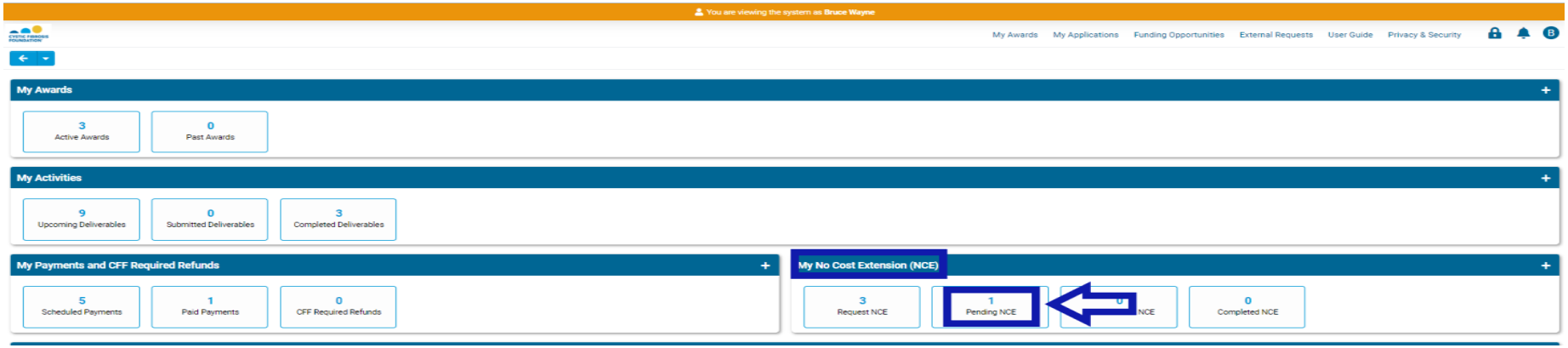


4. By clicking on the **Initiate NCE** button, the status of the No-Cost Extension request will move to **Pending** status. When the No-Cost Extension request is in **Pending** status, you can find the Pending No-Cost Extension request in the **Pending NCE** tile under the **My No Cost Extension (NCE)** module. To continue working on the No-Cost Extension request, click on the **Begin Preparation** button.

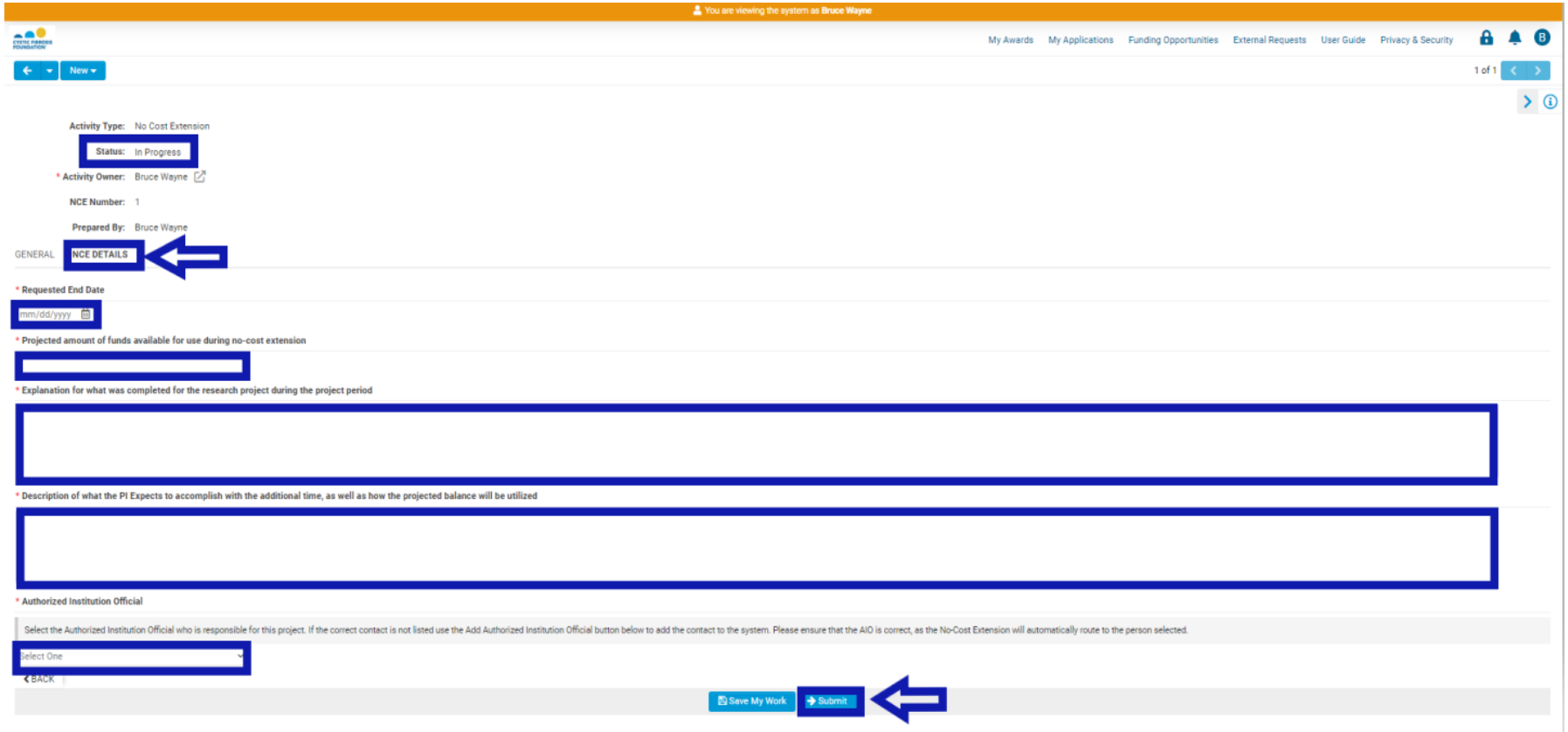




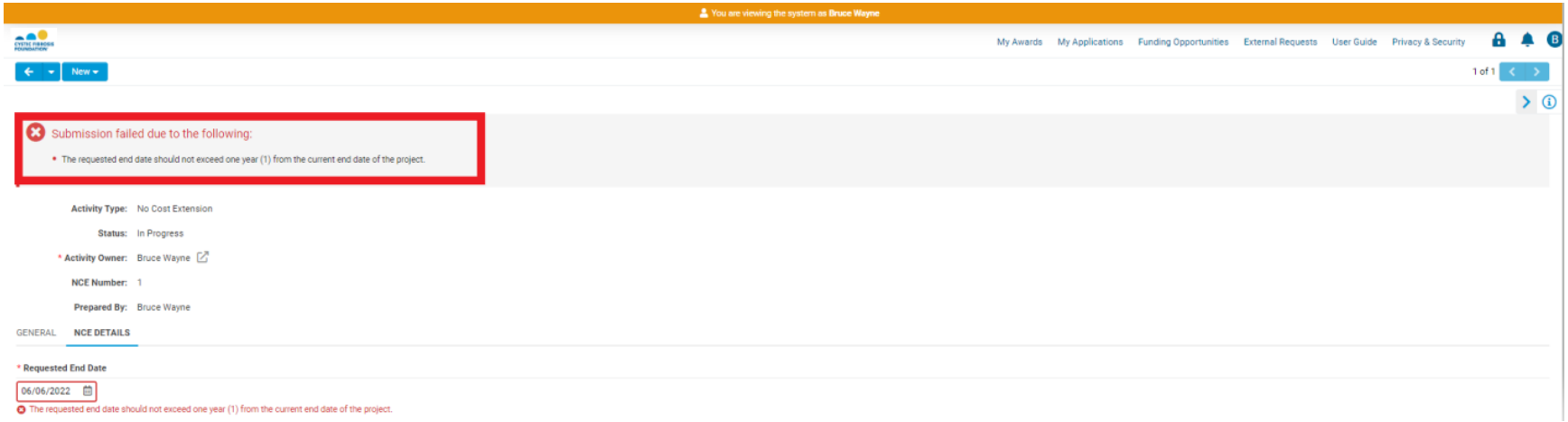
5. The status of the No-Cost Extension request will move from **Pending** to **In Progress** status once you click on the **Begin Preparation** button. When the No-Cost Extension request is in **In Progress** status, you can find the Pending No-Cost Extension request in the **Pending NCE** tile under the **My No Cost Extension (NCE)** module.



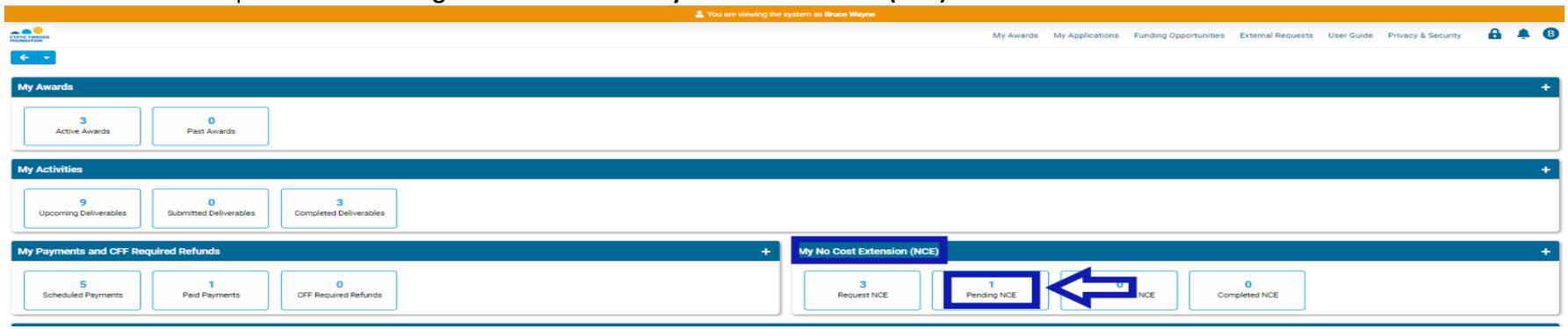
6. When the No-Cost Extension request is in **In Progress** status, you must fill out the details of the No-Cost Extension request under the **NCE Details** tab. Under this tab, you will enter in the Requested Project End Date, Projected amount of funds ($) available for use during the no-cost extension, Explanation for what was completed for the research project during the project period, Description of what the PI Expects to accomplish with the additional time, as well as how the projected balance will be utilized. You must also enter in your **Authorized Institution Official** contact that will be reviewing and approving the No-Cost Extension request in the search bar under the **Authorized Institution Official** section. Once all details have been entered under the **NCE Details** tab, click on the **Submit** button to move the No-Cost Extension request forward.



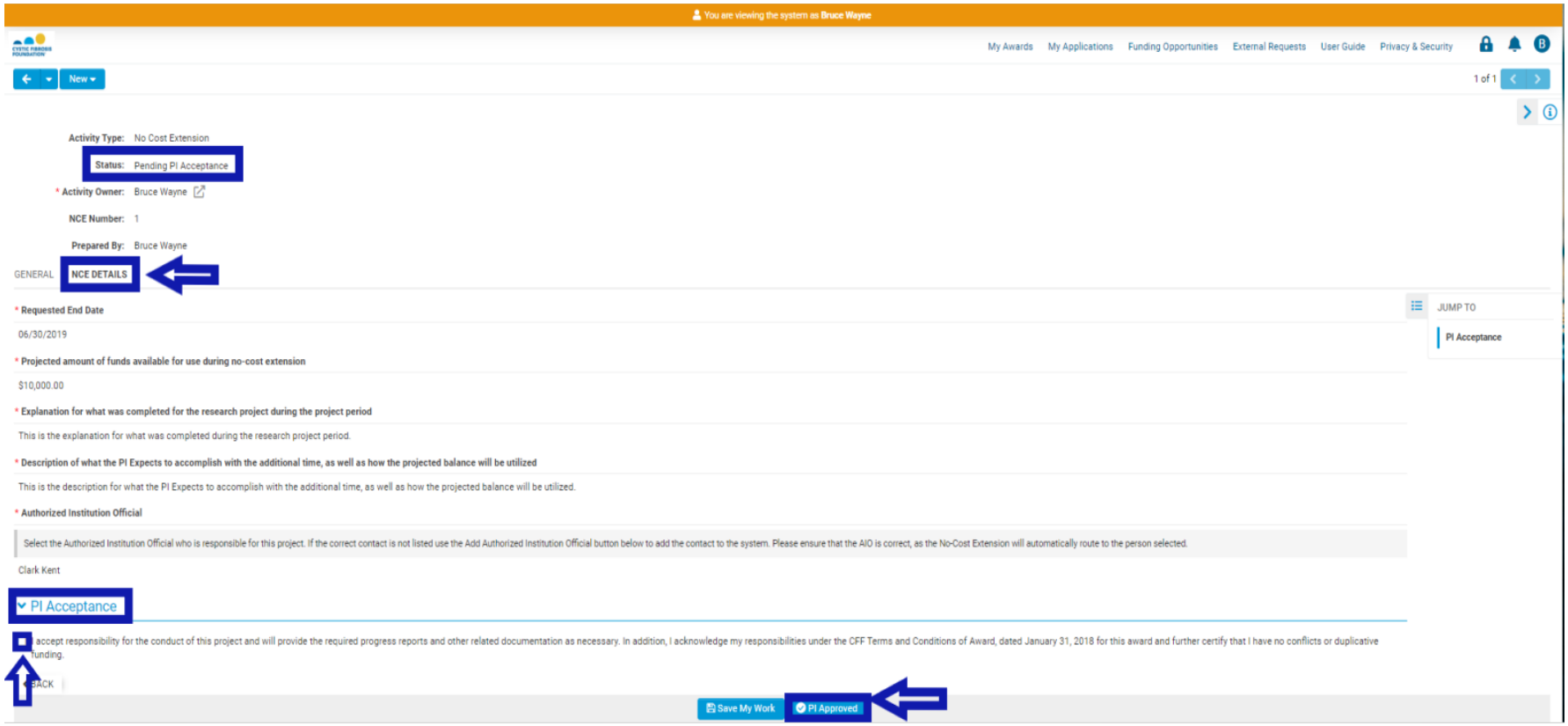
PLEASE NOTE: The **requested end date** may not exceed one (1) year from the current end date of the project. If the **requested end date** exceeds one year after the current project end date, the system **WILL NOT** allow you to move the No-Cost Extension request forward.



7. The status of the No-Cost Extension request will move from **In Progress** status to **Pending PI Acceptance** status. This means that the **Principal Investigator** of the award will need to review the details of the request and approve the No-Cost Extension request. When the No-Cost Extension request is in **Pending PI Acceptance** status, the **Principal Investigator** of the award will find the **Pending PI Acceptance** No-Cost Extension request in the **Pending NCE** tile under the **My No Cost Extension (NCE)** module.

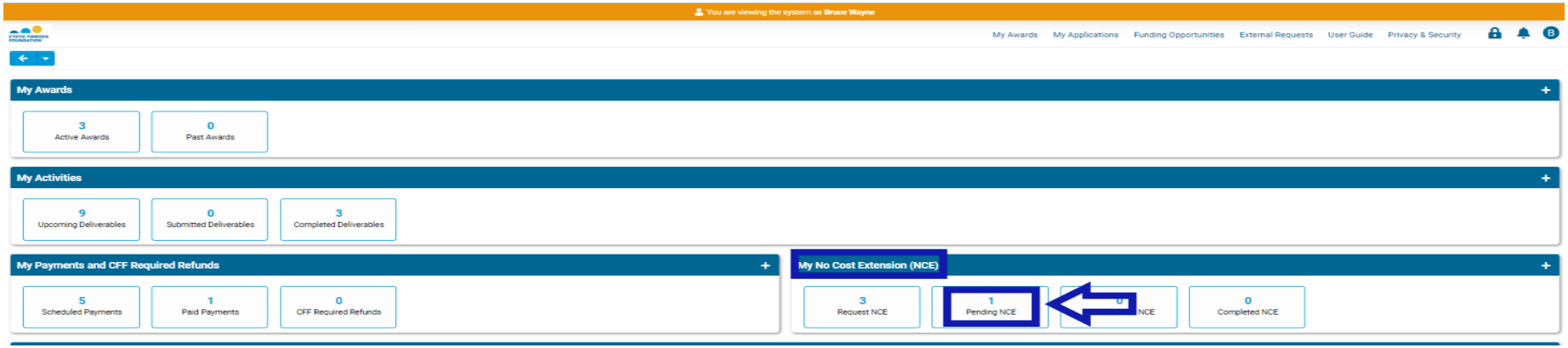


8. When the status of the No-Cost Extension request is in **Pending PI Acceptance** status, the **Principal Investigator** will be able to view all the details entered in for the No-Cost Extension Request under the **NCE Details** tab. To approve the No-Cost Extension request, the **Principal Investigator** will need to provide their attestation under the **PI Acceptance** section by clicking on the check box. Once that has been completed, the **Principal Investigator** can move the No-Cost Extension request forward by clicking on the **PI Approved** button.

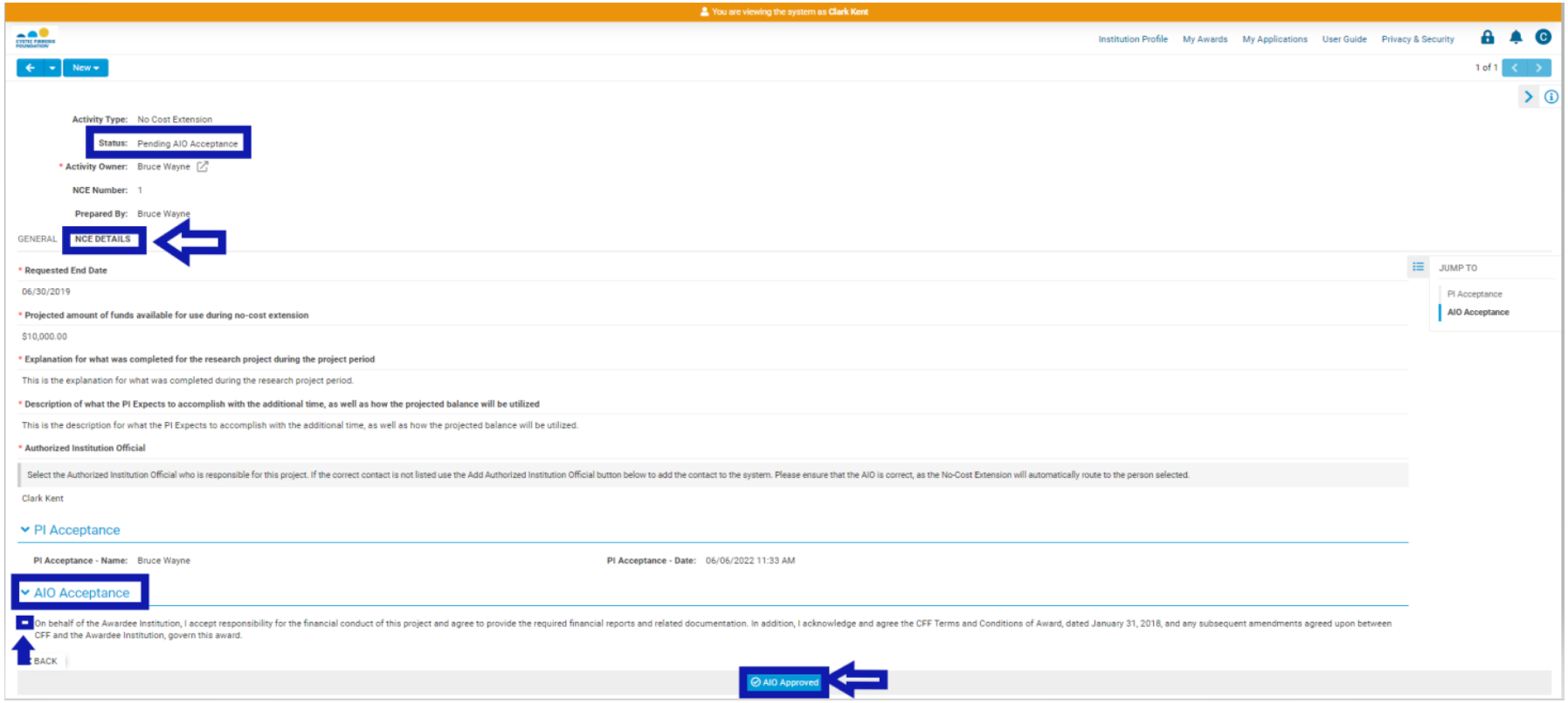


9. The status of the No-Cost Extension request will move from **Pending PI Acceptance** status to **Pending AIO Acceptance** status. This means that the **Authorized Institution Official** that was previously entered into the **NCE Details** tab will need to review and approve the No-Cost Extension request. When the No-Cost Extension request is in **Pending AIO Acceptance** status, the **Authorized Institution Official** that was entered into the **NCE Details** tab will find the **Pending AIO Acceptance** No-Cost Extension request in the **Pending NCE** tile under the **My No Cost Extension (NCE)** module.

   PLEASE NOTE: The **Authorized Institution Official will not** receive an email notification from the system once the status moves to **Pending AIO Acceptance**. The **Authorized Institution Official** must log into the system to be able to view the No-Cost Extension in **Pending AIO Acceptance status.**



10. When the status of the No-Cost Extension request is in **Pending AIO Acceptance** status, the **Authorized Institution Official** will be able to view all the details entered in for the No-Cost Extension Request under the **NCE Details** tab. To approve the No-Cost Extension request, the **Authorized Institution Official** will need to provide their attestation under the **AIO Acceptance** section by clicking on the check box. Once that has been completed, the **Authorized Institution Official** can **SUBMIT** the No-Cost Extension request to CFF for review by clicking on the **AIO Approved** button. **This is the final step for submitting the No-Cost Extension request for review by CFF.**



11. Once the **Authorized Institution Official** submits the No-Cost Extension request, the status of the No-Cost Extension request will move from **Pending AIO Acceptance** to **Submitted/Pending PA Acceptance** status. This means that the No-Cost Extension is pending review and approval by CFF. All Post-Award contacts associated with the award, who are listed on Page 2 of this guide, will be able to find the No-Cost Extension request in **Submitted/Pending PA Acceptance** status under the **Under Review NCE** tile of their **My No Cost Extension (NCE)** module.

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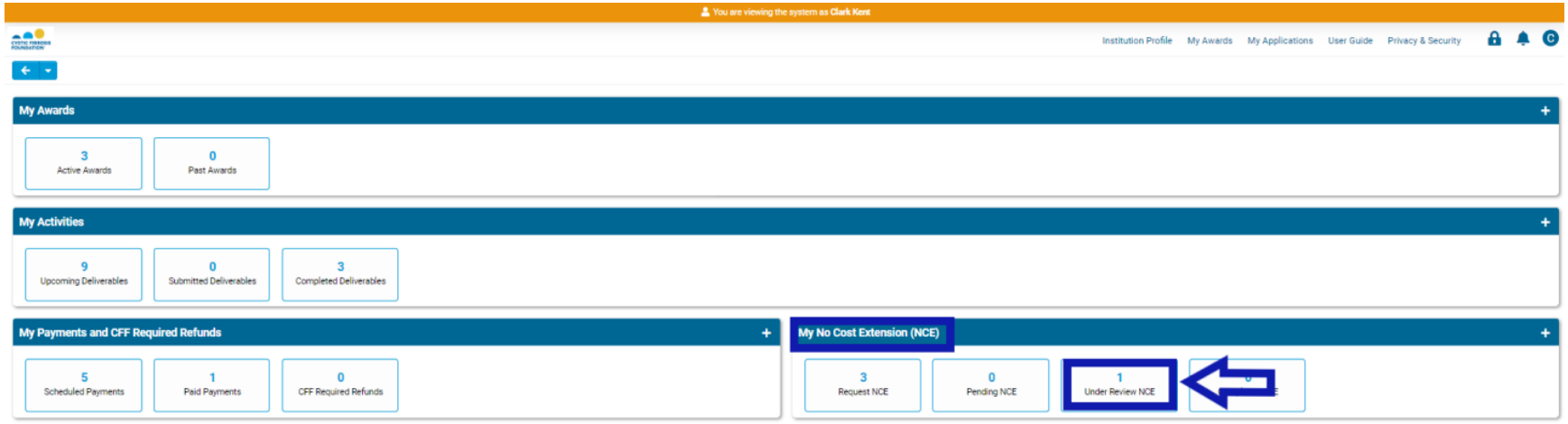
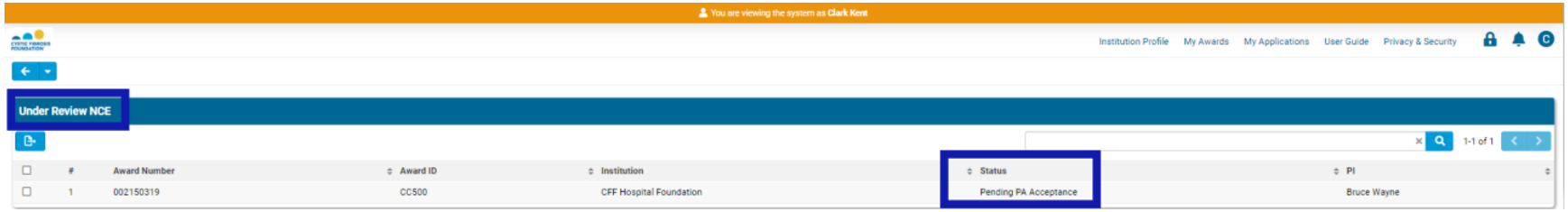
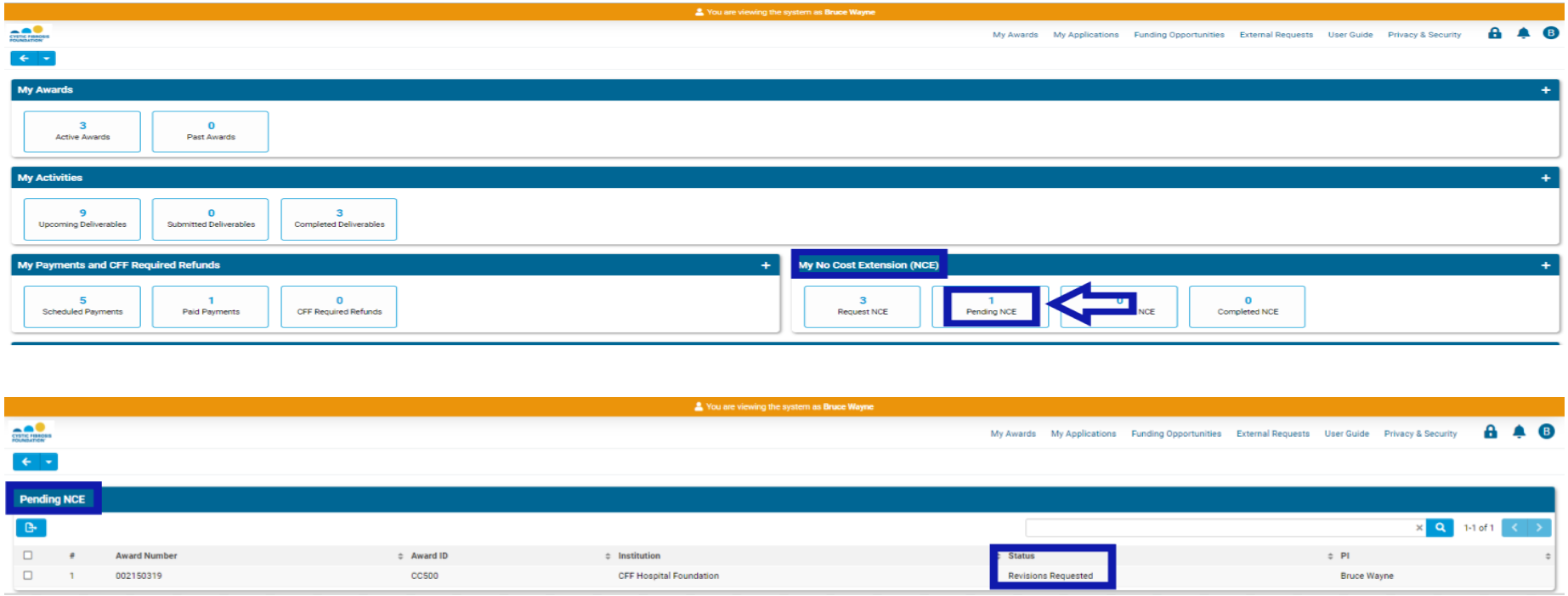




Revisions Requested:

1. If the No-Cost Extension request has been reviewed by CFF but not approved, you will find that the submitted No-Cost Extension request has been sent back by CFF in **Revisions Requested** status. You will find the No-Cost Extension in **Revisions Requested** status under the **Pending NCE** tile under the **My No Cost Extensions (NCE)** module.



2. On the No-Cost Extension page, you will find the **Revisions Requested** by CFF in a text box. All Post-Award contacts associated with the award, who are listed on Page 2 of this guide, will be able to enter in all revisions requested for the No-Cost Extension request under the **NCE Details** tab. Once all revisions have been made, click on the **Submit Revision** button to re-submit the No-Cost Extension request for the **Principal Investigator's** review.

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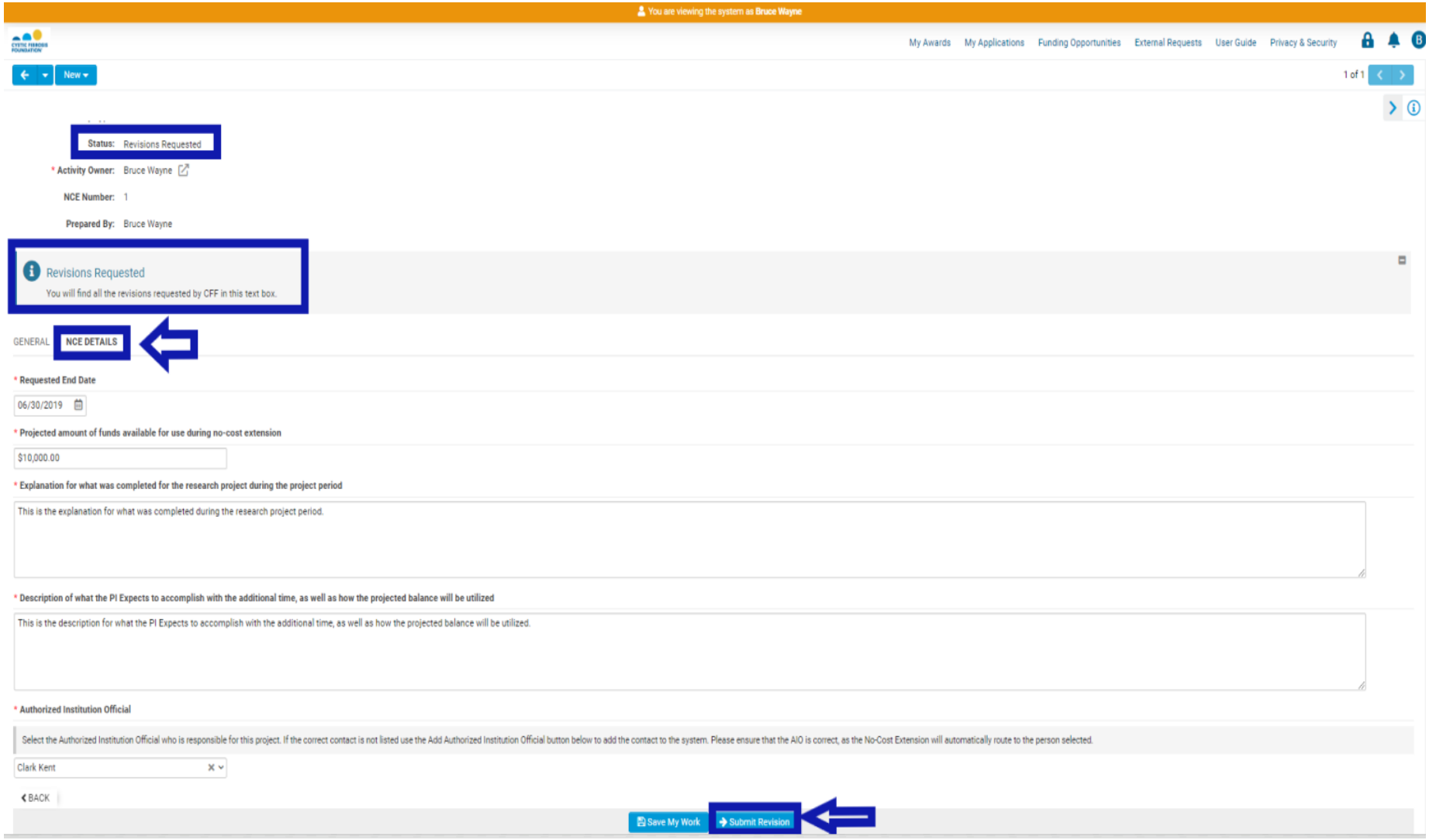
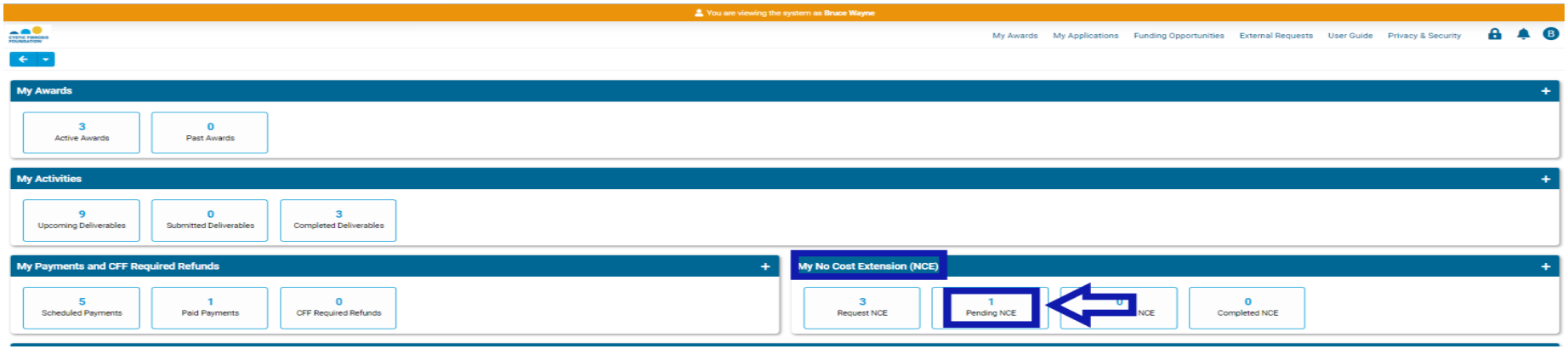


3. The status of the revised No-Cost Extension request will move from **Requested Revisions** status to **Pending PI Acceptance** status. This means that the **Principal Investigator** of the award will need to review and approve the revised No-Cost Extension request. When the No-Cost Extension request is in **Pending PI Acceptance** status, the **Principal Investigator** of the award will find the **Pending PI Acceptance** No-Cost Extension request in the **Pending NCE** tile under the **My No Cost Extension (NCE)** module.



4. When the status of the revised No-Cost Extension request is in **Pending PI Acceptance** status, the **Principal Investigator** will be able to view all the details entered in for the revised No-Cost Extension Request under the **NCE Details** tab. To approve the revised No-Cost Extension request, the **Principal Investigator** will need to provide their attestation under the **PI Acceptance** section by clicking on the check box. Once that has been completed, the **Principal Investigator** can move the revised No-Cost Extension request forward by clicking on the **PI Approved** button.

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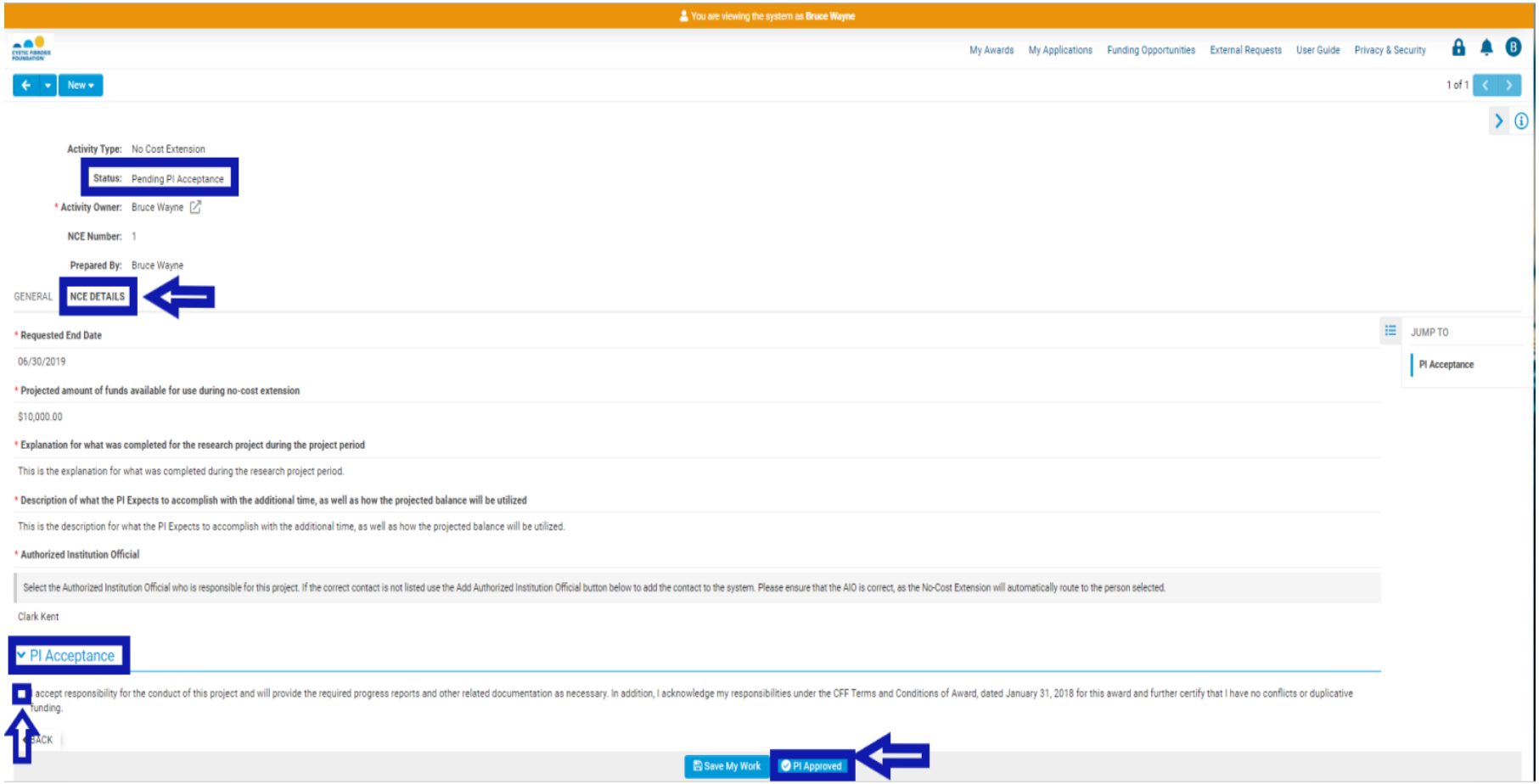
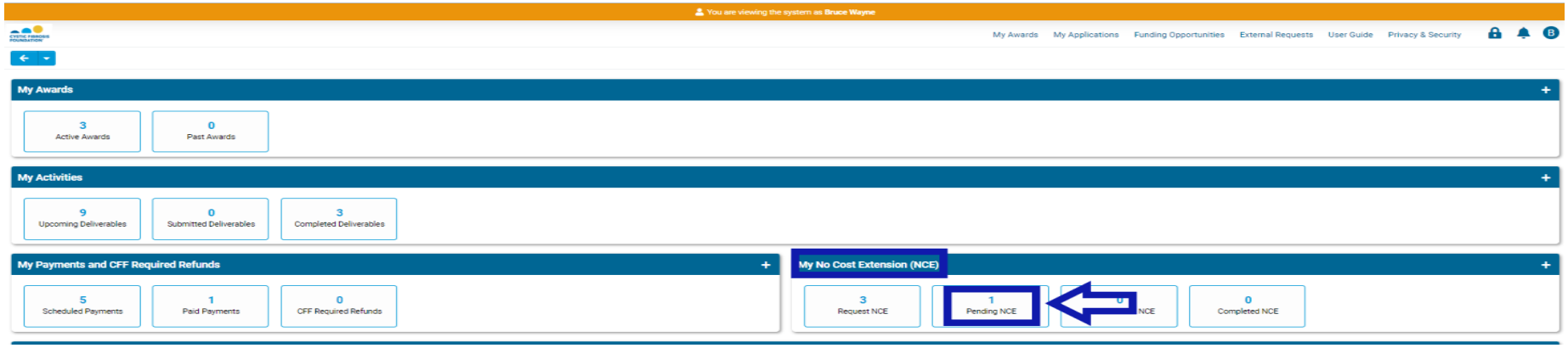
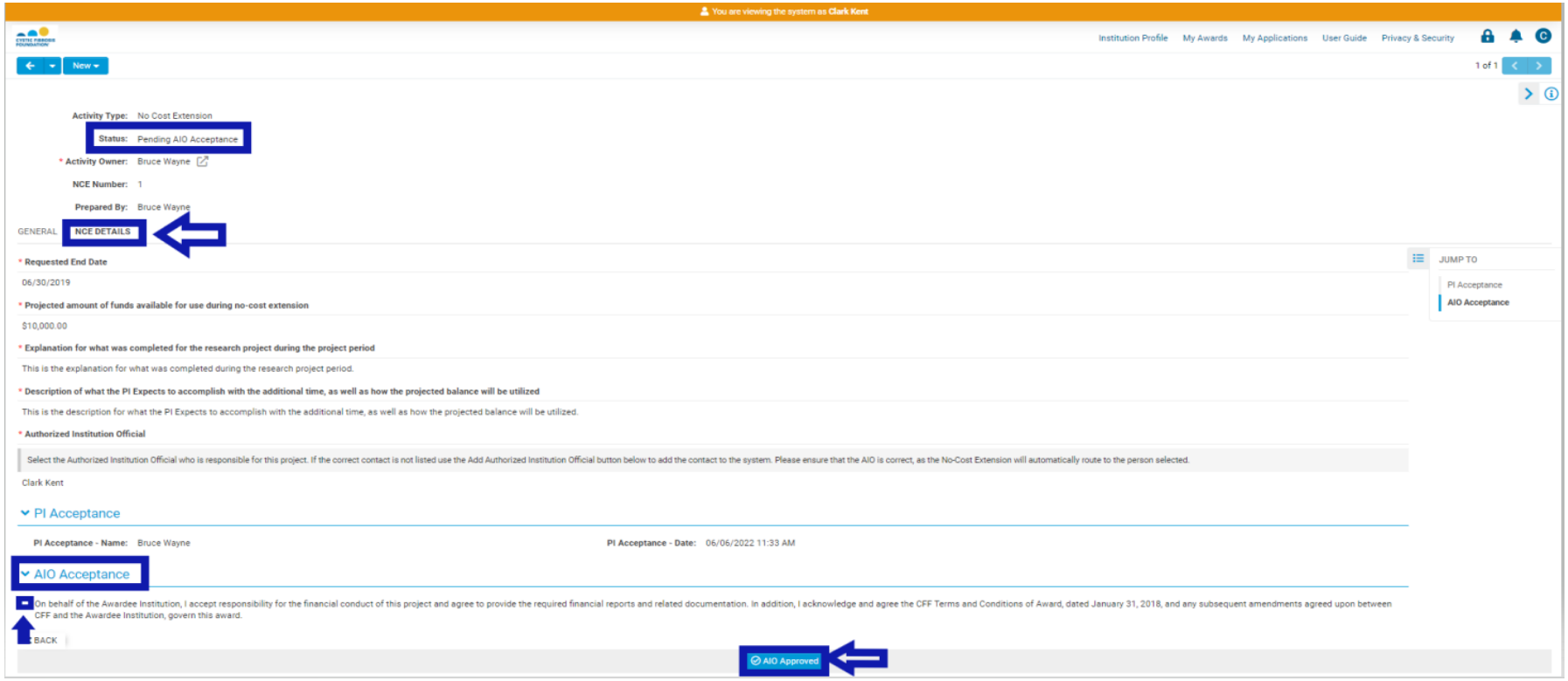


5. The status of the revised No-Cost Extension request will move from **Pending PI Acceptance** status to **Pending AIO Acceptance** status. This means that the **Authorized Institution Official** that was previously entered into the **NCE Details** tab will need to review and approve the revised No-Cost Extension request. When the revised No-Cost Extension request is in **Pending AIO Acceptance** status, the **Authorized Institution Official** that was entered into the **NCE Details** tab will find the **Pending AIO Acceptance** No-Cost Extension request in the **Pending NCE** tile under the **My No Cost Extension (NCE)** module



6. When the status of the revised No-Cost Extension request is in **Pending AIO Acceptance** status, the **Authorized Institution Official** will be able to view all the details entered in for the revised No-Cost Extension Request under the **NCE Details** tab. To approve the revised No-Cost Extension request, the **Authorized Institution Official** will need to provide their attestation under the **AIO Acceptance** section by clicking on the check box. Once that has been completed, the **Authorized Institution Official** can **RE-SUBMIT** the revised No-Cost Extension request to CFF for review by clicking on the **AIO Approved** button. **This is the final step for submitting the revised No-Cost Extension request for review by CFF.**



7. Once the **<u>Authorized Institution Official</u>** resubmits the revised No-Cost Extension request, the status of the revised No-Cost Extension request will move from **Pending AIO Acceptance** to **Submitted/Pending PA Acceptance** status. This means that the revised No-Cost Extension is pending review and approval by CFF. All Post-Award contacts associated with the award, who are listed on Page 2 of this guide, will be able to find the revised No-Cost Extension request in **Submitted/Pending PA Acceptance** status under the **Under Review NCE** tile of their **My No Cost Extension (NCE)** module.

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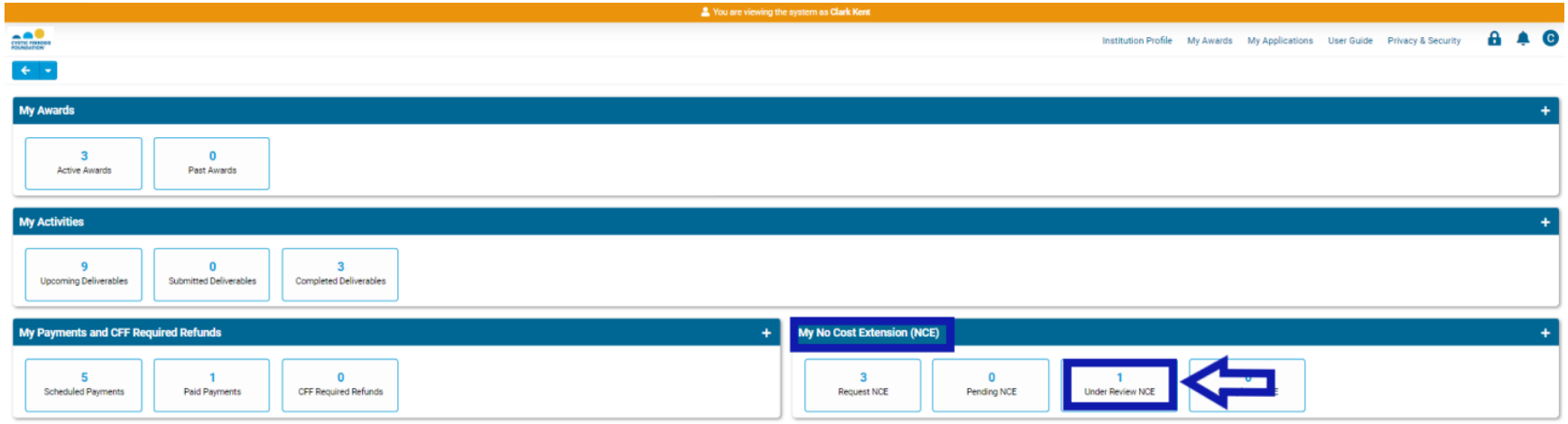
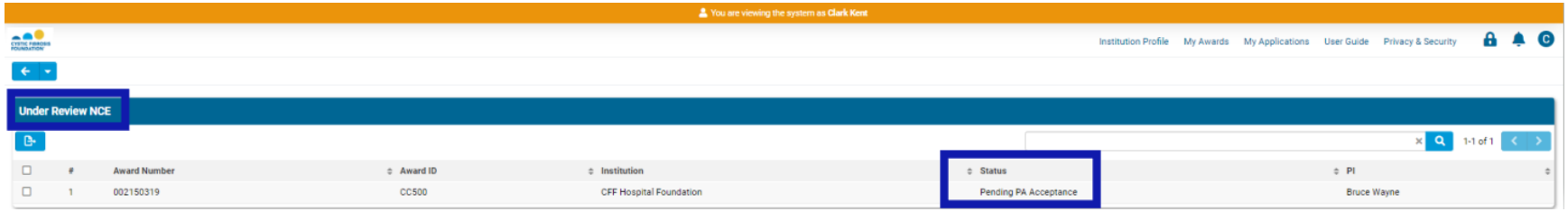
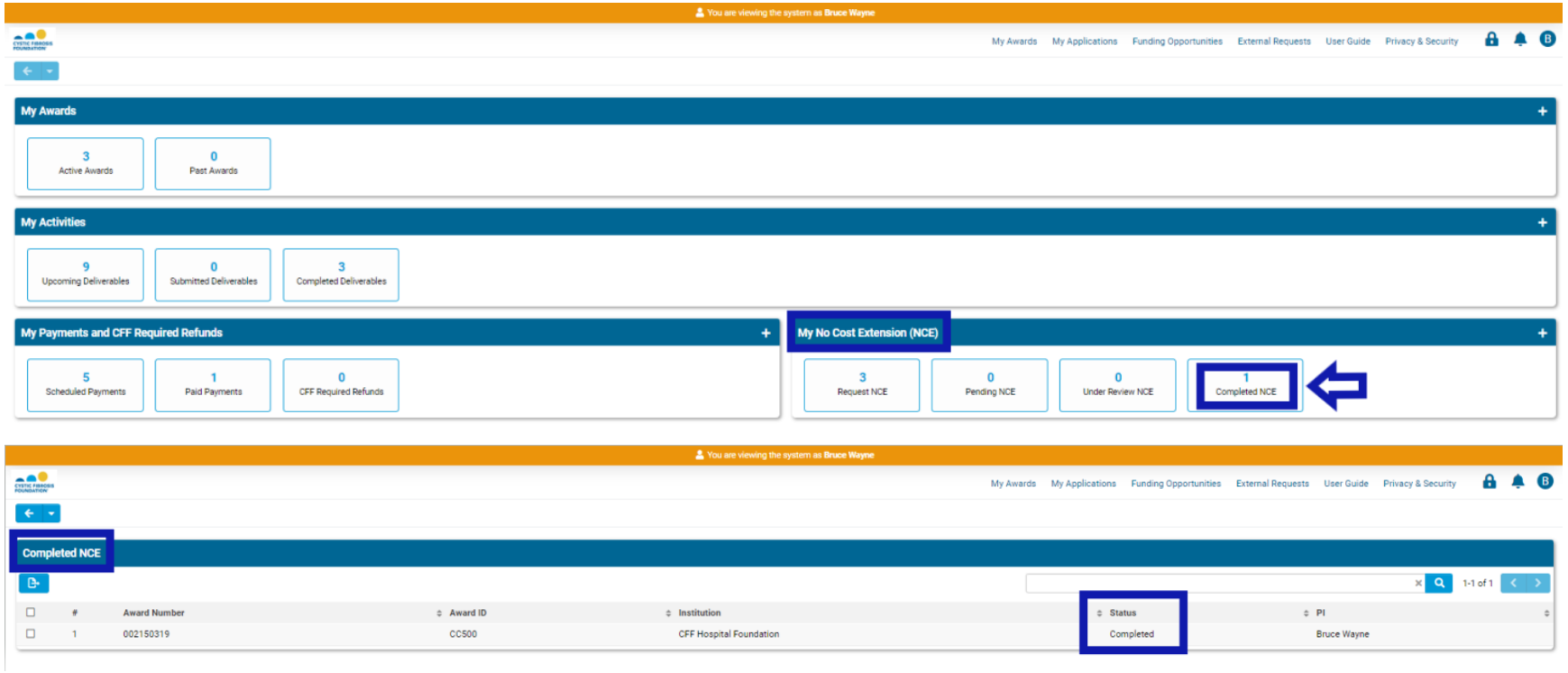




No-Cost Extension Approval:

1. When the No-Cost Extension request has been **reviewed and approved** by CFF, all Post-Award contacts associated with the award, who are listed on Page 2 of this guide, will be able to find the approved No-Cost Extension request in the **Completed NCE** tile under the **My No Cost Extension (NCE)** module. The status of the No-Cost Extension request will move from **Submitted/Pending PA Acceptance** status to **Completed** status. This means that the No-Cost Extension request has been approved by CFF and the award has the been granted the new requested project end date listed on the No-Cost Extension request.



IMPORTANT NOTES:

- When a No-Cost Extension request is approved, the Final Deliverables (which are typically the Final Scientific Report and Final Report of Expenditures) will have a new schedule date of three months after the new No-Cost Extension requested project end date.
  - For example, if the approved No-Cost Extension requested end date is 1/31/2022, the scheduled date (due date) for the final deliverables will be updated to 4/1/2022.
- You may request a subsequent No-Cost Extension request after the first No-Cost Extension request no sooner than 90 days before the end of the first No-Cost Extension project end date.

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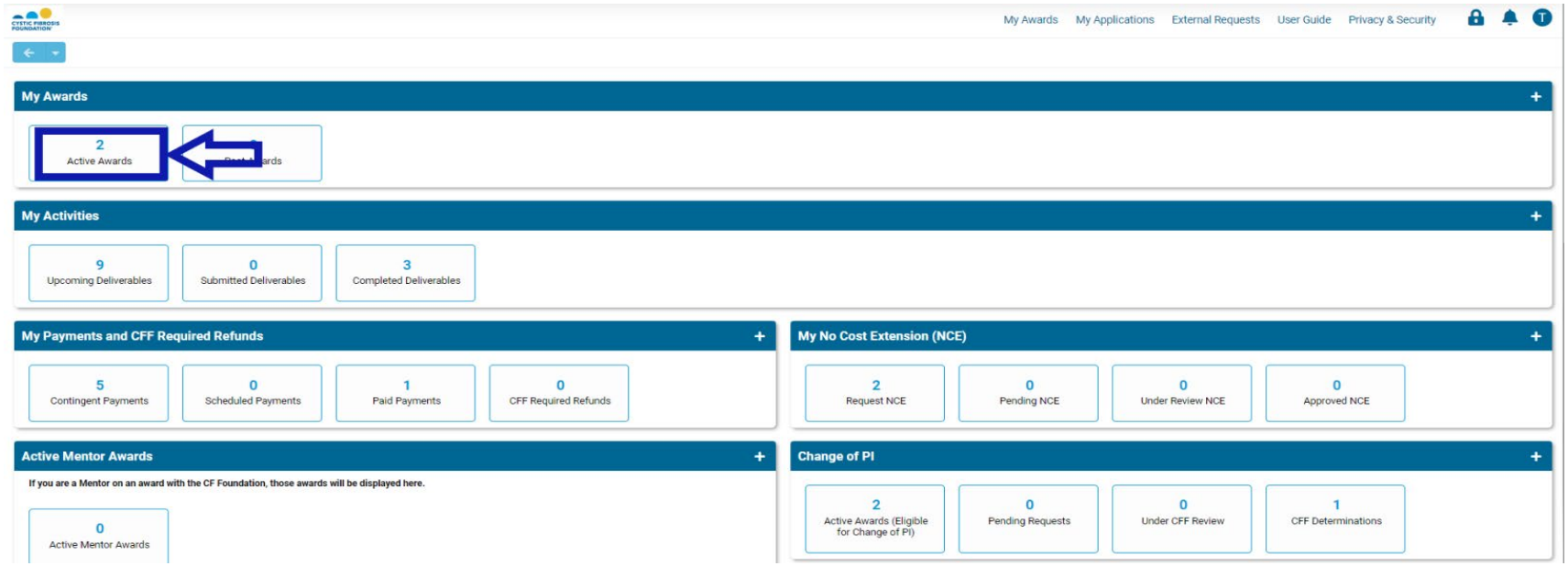
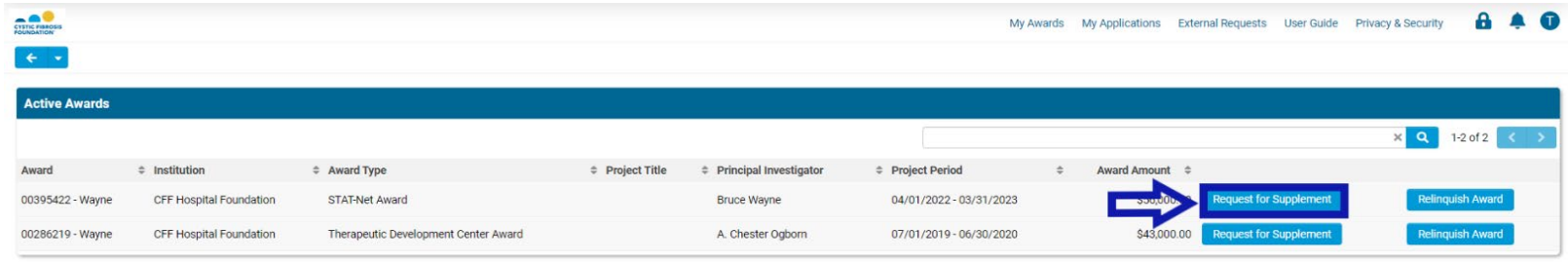
How to Submit a Supplemental Request

Please Note: All Supplemental submissions should be preceded by discussions with the CF Foundation's Program Officer regarding the programmatic reasoning for submitting a request for supplemental funding.

1. To request a Supplement Request for an Award, go to the **My Awards** module under the **My Awards** homepage and click on the **Active Awards** tile.

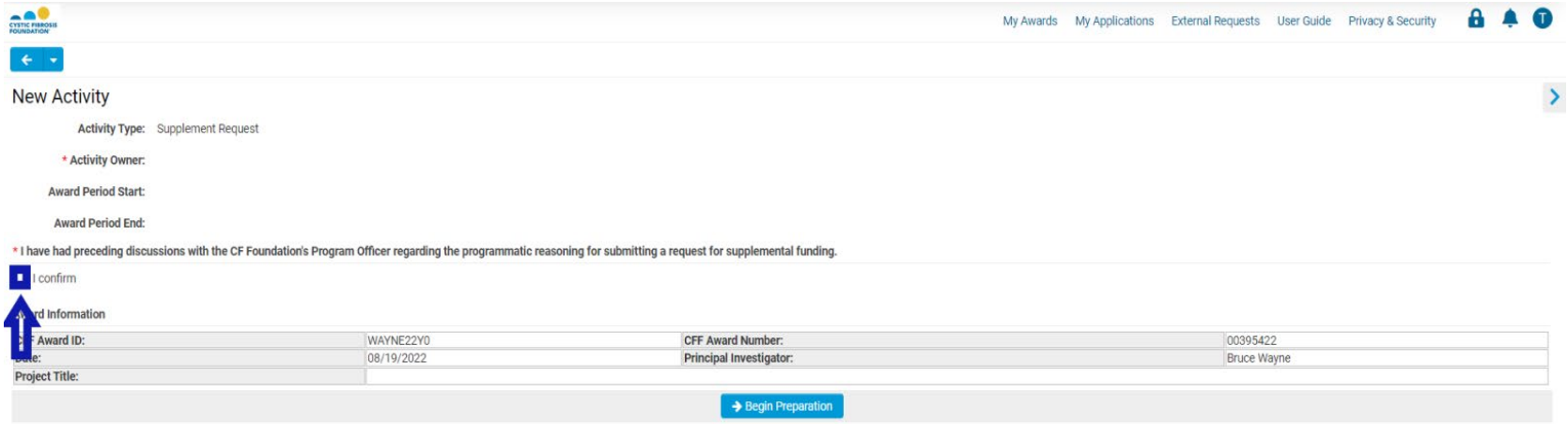


2. On the **Active Awards** page, you will find a list of all awards that you are associated with as a contact. Only the **Grants Officer, Authorized Institutional Official or Principal Investigator** that is associated with the Award Profile can request a Supplemental Request. Click the **Request for Supplement** button to create a Supplemental request for that specific award.



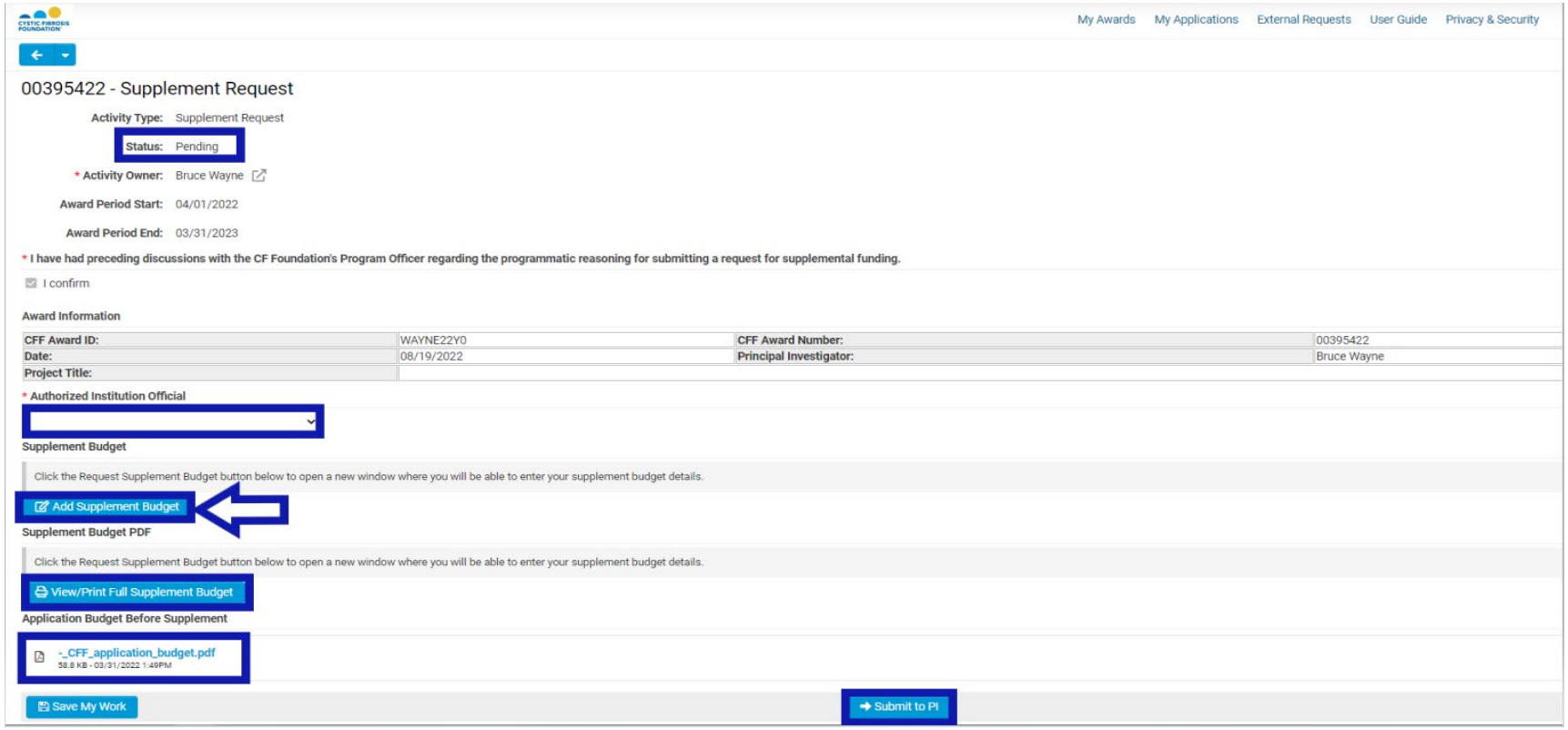
PLEASE NOTE: You will only be able to view the award under the **Active Awards** tile only if the **Principal Investigator** of the award has added you as a contact to their award. (For more information, see refer to the guide **"How to Add Contacts"**)

3. When you click on the **Request for Supplement** button, the system will create a Supplement request in **Pending** status. You will first need to provide confirmation that you have had preceding discussions with the CF Foundation's Program Officer regarding the programmatic reasoning for submitting a request for supplemental funding. To move the request forward, click the **Begin Preparation** button.

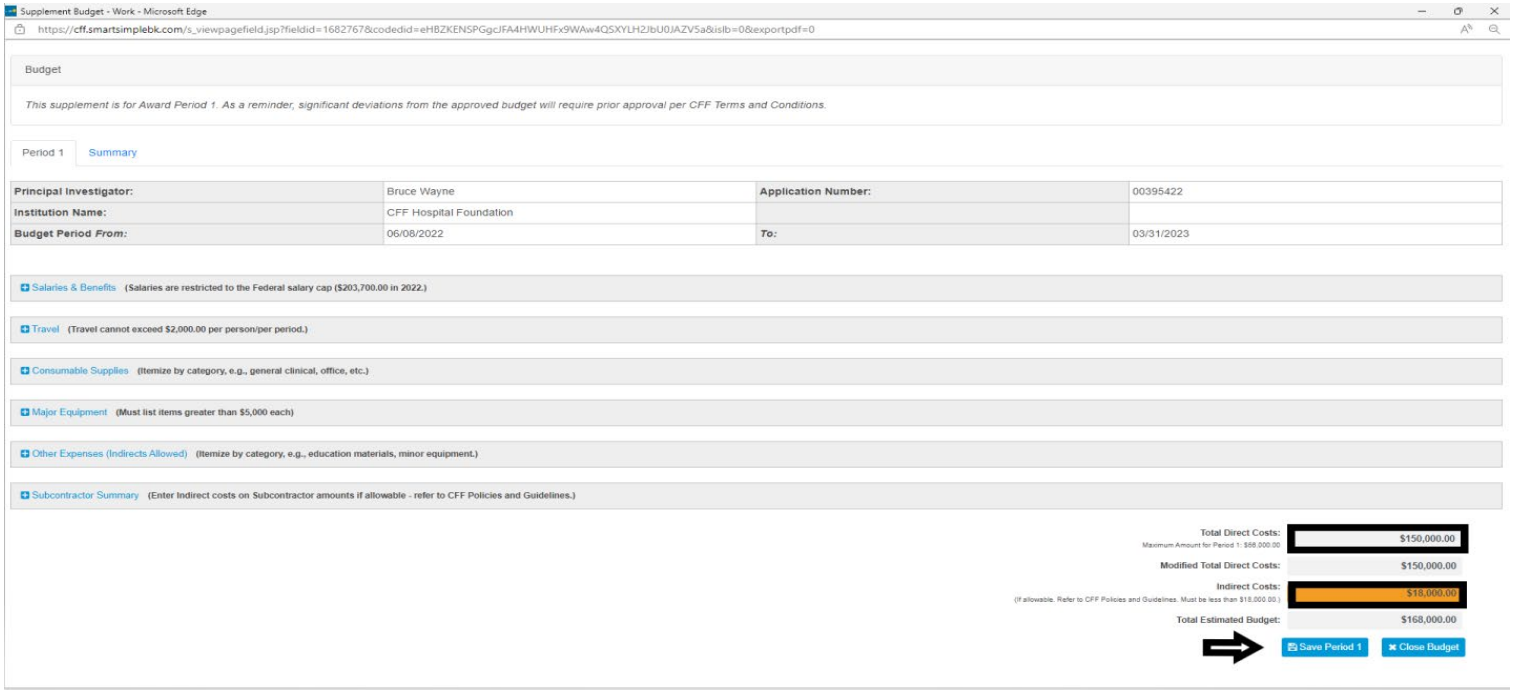


PLEASE NOTE: Supplement Requests can only be requested **one Award Period** at a time. The Award Period that the Supplement Budget is requested for is based on the calendar day the Supplement Request is made.

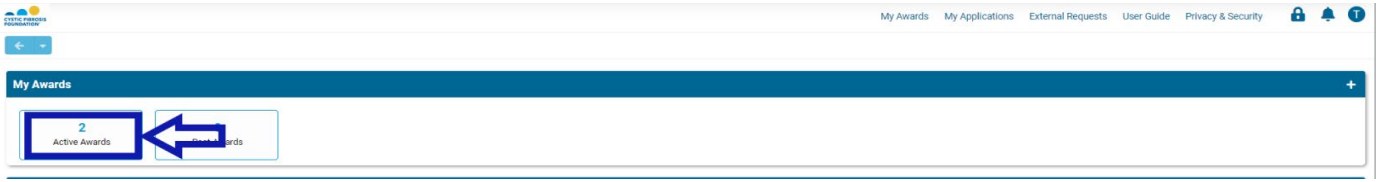
4. On the Supplement Request page, you will first need to add the **Authorized Institution Official** who will sign off on the Supplement Request by clicking on the drop-down field and selecting your **Authorized Institution Official.** To enter in the Budget Details for your Supplement Budget click on the **Add Supplement Budget** button.



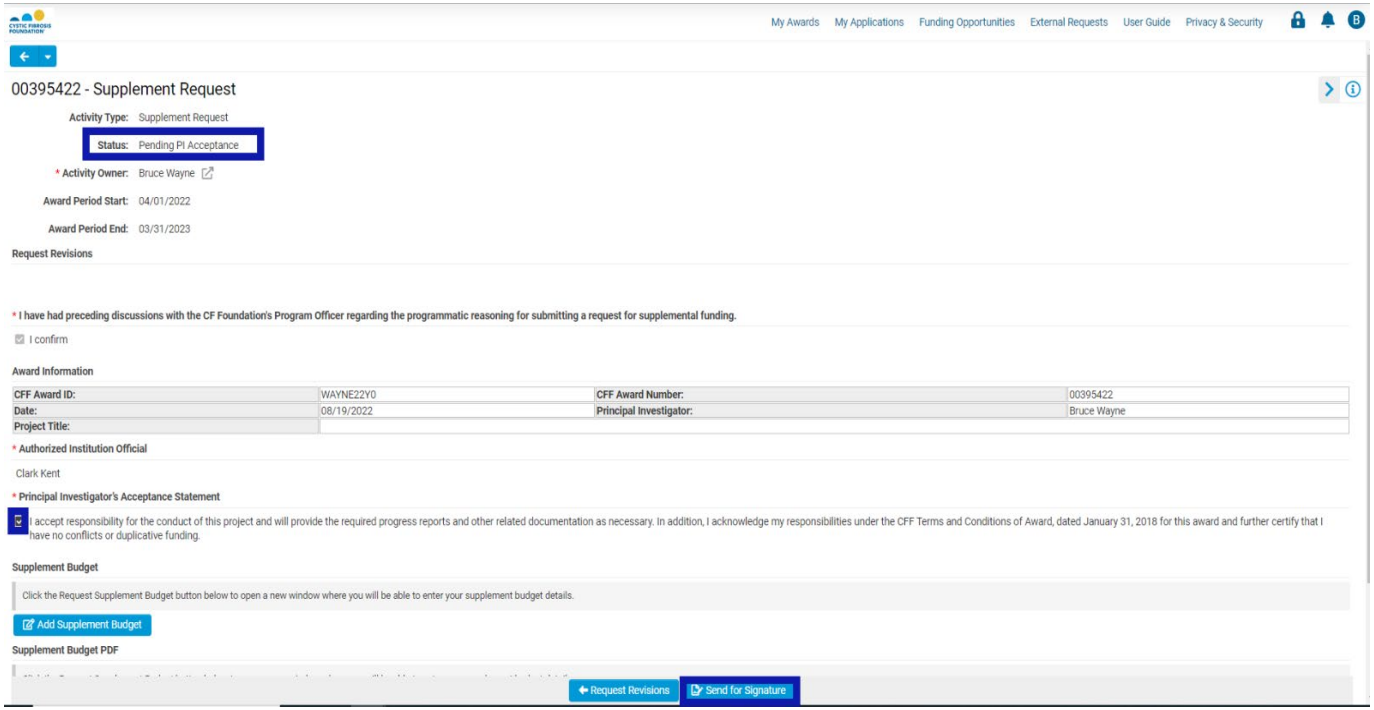
5. When you click on the **Add Supplement Budget** button, a pop-up window will appear which will allow you to enter in the estimated expenses for the Supplement Request. You will also be able to edit or remove any estimated expenses that were initially entered at the application stage. Once you have entered in all your estimated expenses for the Supplement Award Period, click on the **Save Period** button and close the window. To move the request forward, click on the **Submit to PI** button to submit the request to the **Principal Investigator** for review.



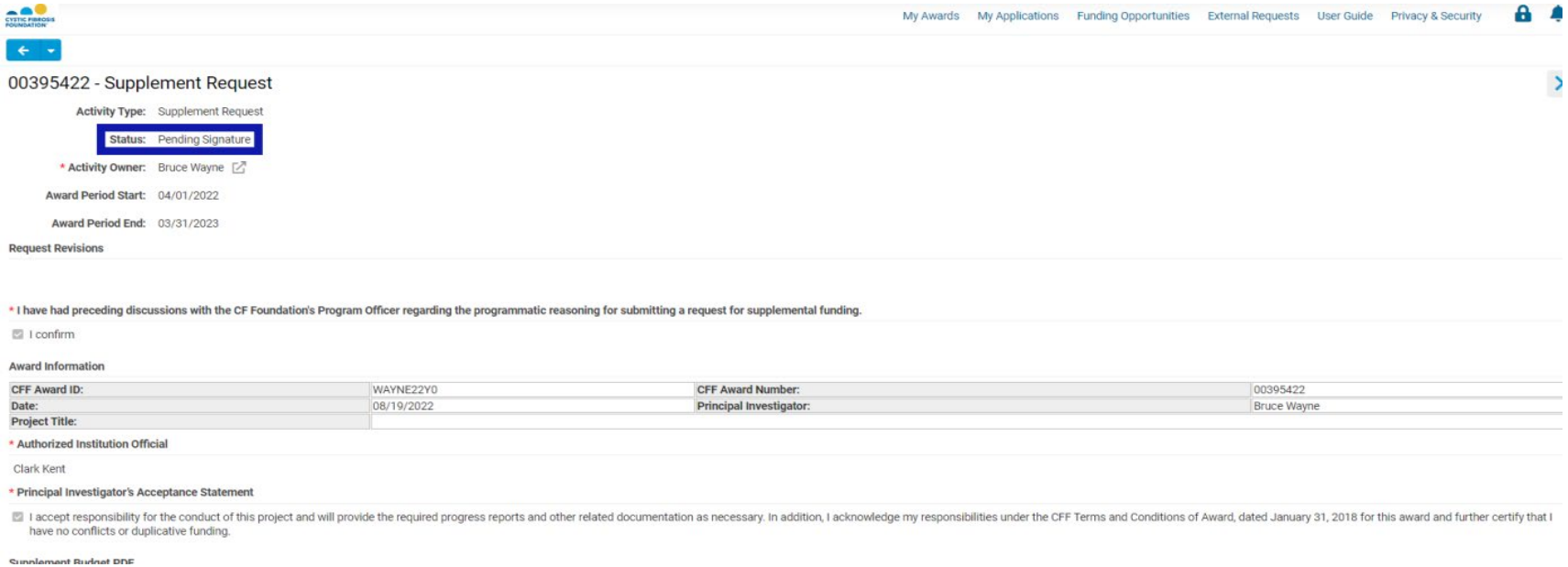
6. The status of the Supplement Request will move from **Pending** status to **Pending PI Acceptance** status. This means that the **Principal Investigator** of the award will need to review the details of the request and submit the Supplement Request to the **Authorized Institution Official** for signature. When the Supplement Request is in **Pending PI Acceptance** status, the **Principal Investigator** of the award will find the **Pending PI Acceptance** Supplement request in the **Active Awards** tile under the **My Awards** module.



7. Under **Pending PI Acceptance** status, the **Principal Investigator** can either Request Revisions or Submit the request to the **Authorized Institution Official** for signature. To approve the request, click on the **Send for Signature** button.



8. The status of the Supplemental Request will move from **Pending PI Acceptance** status to **Pending Signature** status. **Pending Signature** status means that Adobe Sign will automatically route the Supplement Request to the **Authorized Institution Official's** email address (outside of the system). The Adobe Sign email will request the **Authorized Institution Official's** e-signature on the Supplement Request. When the **Authorized Institution Official** provides their e-signature, the Supplement Request will automatically route back to the Grants Management System for review and the status will move to **Under CFF Program Officer Review** status. **This is the final step for submitting the Supplement Request for review by CFF.**



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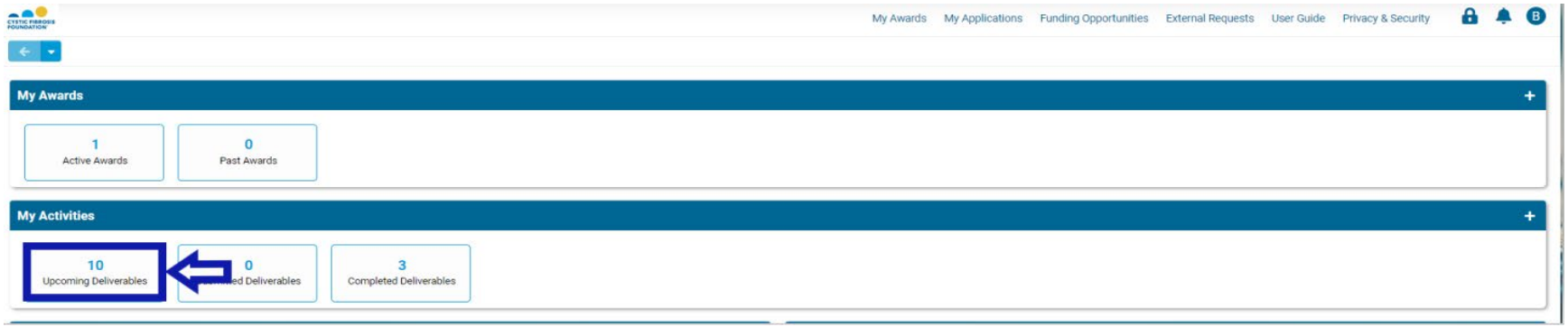
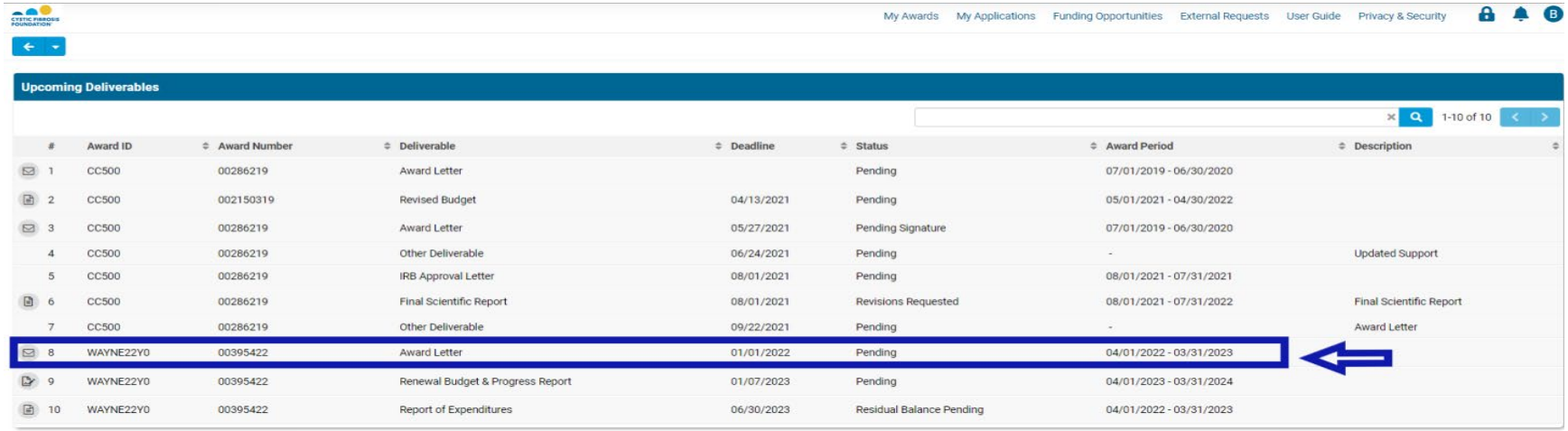
Supplement Request Approval:

When the Supplement Request has been **reviewed and approved** by CFF, a notification will go out of the system to the **Principal Investigator, Grants Officer, and Authorized Institution Official** stating that the **Supplement Request** has been approved and that the Supplement Award Letter has been issued. The **Principal Investigator** will find the Supplement Award Letter that is pending the **Principal Investigator and Authorized Institution Official's** signature under the **My Activities** module under the **Upcoming Deliverables** tile.





#	Award ID	Award Number	Deliverable	Deadline	Status	Award Period	Description
1	CC500	00286219	Award Letter		Pending	07/01/2019 - 06/30/2020	
2	CC500	002150319	Revised Budget	04/13/2021	Pending	05/01/2021 - 04/30/2022	
3	CC500	00286219	Award Letter	05/27/2021	Pending Signature	07/01/2019 - 06/30/2020	
4	CC500	00286219	Other Deliverable	06/24/2021	Pending	-	Updated Support
5	CC500	00286219	IRB Approval Letter	08/01/2021	Pending	08/01/2021 - 07/31/2021	
6	CC500	00286219	Final Scientific Report	08/01/2021	Revisions Requested	08/01/2021 - 07/31/2022	Final Scientific Report
7	CC500	00286219	Other Deliverable	09/22/2021	Pending	-	Award Letter
8	WAYNE22Y0	00395422	Award Letter	01/01/2022	Pending	04/01/2022 - 03/31/2023	
9	WAYNE22Y0	00395422	Renewal Budget & Progress Report	01/07/2023	Pending	04/01/2023 - 03/31/2024	
10	WAYNE22Y0	00395422	Report of Expenditures	06/30/2023	Residual Balance Pending	04/01/2022 - 03/31/2023	

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How to Request a Change of Principal Investigator

All Change of PI requests must be completed at least one month prior to the proposed date of change within the Grants Management System. A bio sketch (NIH form is acceptable) of the proposed PI and Other Support Document for the Proposed PI must be uploaded as part of the request. The Cystic Fibrosis Foundation (CFF) must approve changes in key personnel in advance. Please note that changes in key personnel are not automatically approved.

Change of PI Status Quick Reference Guide

Status	Pending	Pending PI Acceptance	Pending AIO Acceptance	Under CFF Program Officer Review	Under CFF Program Administrator Review	Revisions Requested	Approved	Cancelled (Declined)
Definition	Change of PI request is now created	Change of PI is pending former the Principal Investigator Review and Approval	Change of PI is pending Authorized Institution Official's Review and Approval	Change of PI has been submitted to CFF and is pending CFF Program Officer Review	Change of PI has been submitted to CFF and is pending CFF Program Administrator Review	Change of PI has been sent back for Revisions Requested and must be re-submitted to CFF	Change of PI Request has been reviewed and approved by CFF	Change of PI Request has been reviewed and declined by CFF
Location of Change of PI Request	Pending Requests Module	Pending Requests Module	Pending Requests Module	Under CFF Review Module	Under CFF Review Module	Pending Requests Module	CFF Determinations Module	CFF Determinations Module

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Change of PI Contact Permissions Quick Reference Guide

Status/Contact	Pending	In Progress	Pending PI Acceptance	Pending AIO Acceptance	Revisions Requested	Under CFF Program Administrator Review	Under CFF Program Officer Review	Approved	Cancelled (Declined)
Principal Investigator	**View Edit**	**View Edit**	**View Edit**	View Only	**View Edit**	View Only	View Only	View Only	View Only
Co-Investigator	View Only	View Only	View Only	View Only	View Only	View Only	View Only	View Only	View Only
Post-Award Contact	View Only	View Only	View Only	View Only	View Only	View Only	View Only	View Only	View Only
Financial Officer	View Only	View Only	View Only	View Only	View Only	View Only	View Only	View Only	View Only
Grants Officer	**View Edit**	**View Edit**	View Only	View Only	**View Edit**	View Only	View Only	View Only	View Only
Authorized Institution Official	**View Edit**	**View Edit**	View Only	**View Edit**	**View Edit**	View Only	View Only	View Only	View Only

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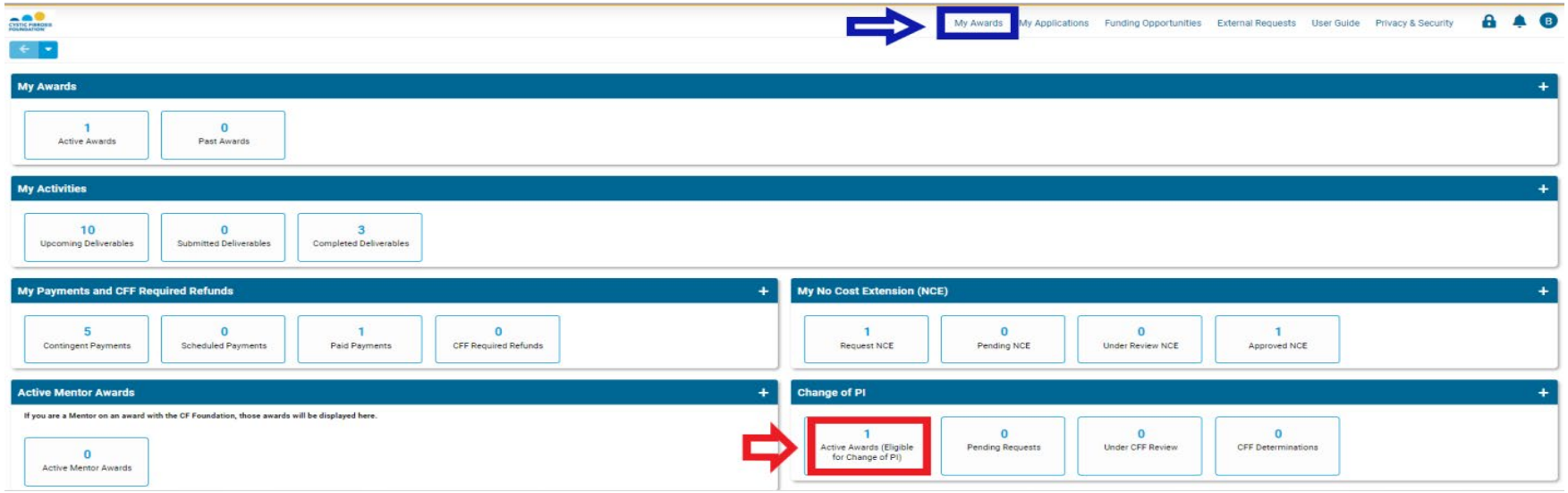
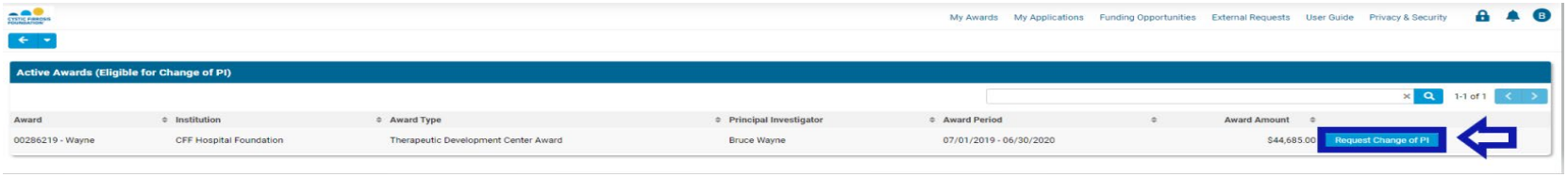
How to Request a Change of Principal Investigator

1. To request a Change of PI, go to the **Change of PI** module under the **My Awards** homepage and click on the **Active Awards Eligible for a Change of PI** tile

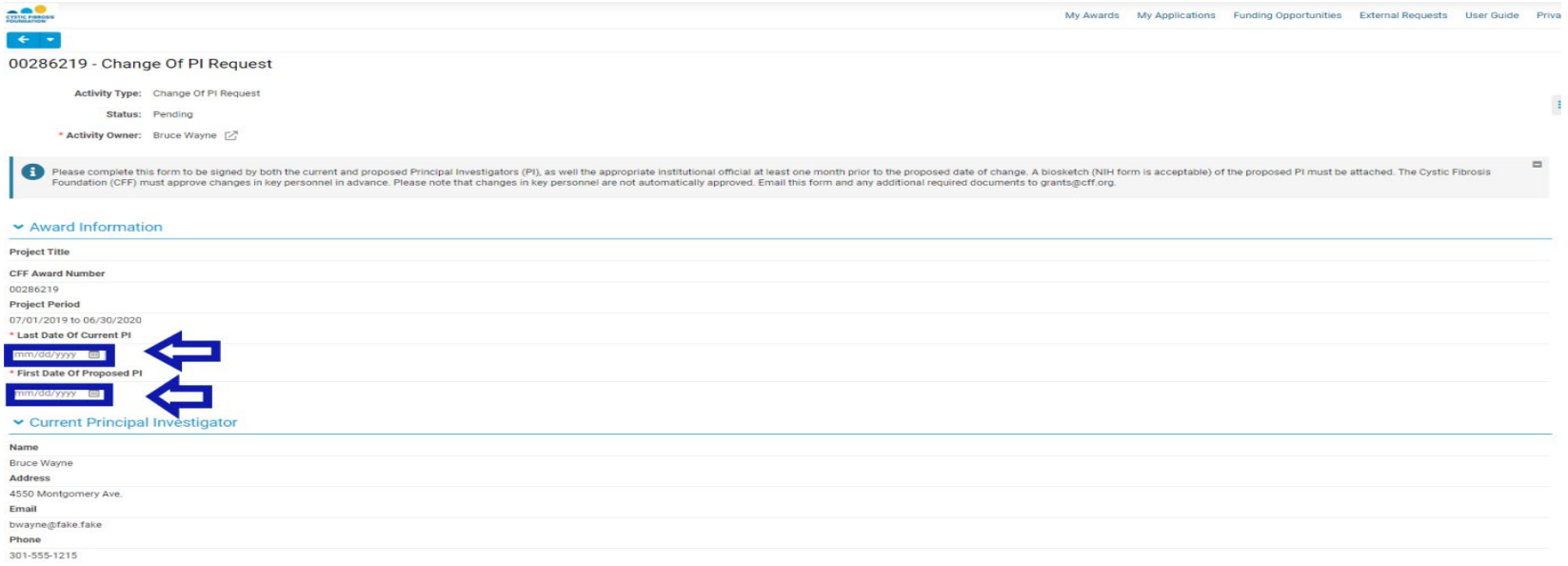


2. On the **Active Awards Eligible for a Change of PI** page, you will find a list of all awards that you are associated with as a contact. Only the **Grants Officer, Authorized Institutional Official or Principal Investigator** that is associated with the Award Profile can request a Change of PI. Click the **Request a Change of PI** button to create a Change of PI request for that award.

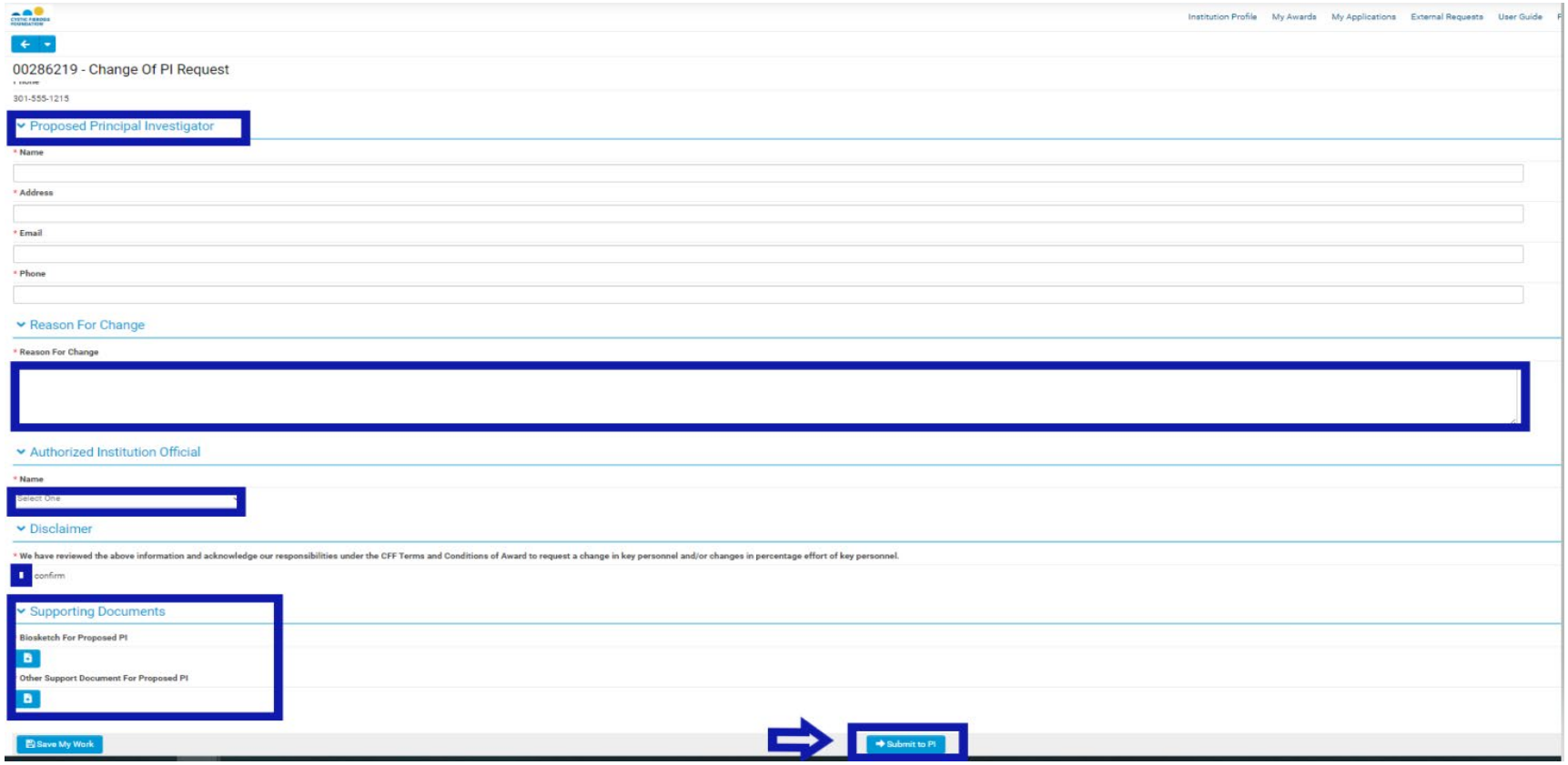


PLEASE NOTE: You will only be able to view the award under the **Active Awards Eligible for Change of PI** tile only if the **Principal Investigator** of the award has added you as a contact to their award AND if you are a Post-Award contact listed on Page 2 of this guide. (For more information, see refer to the guide **"How to Add Contacts"**)

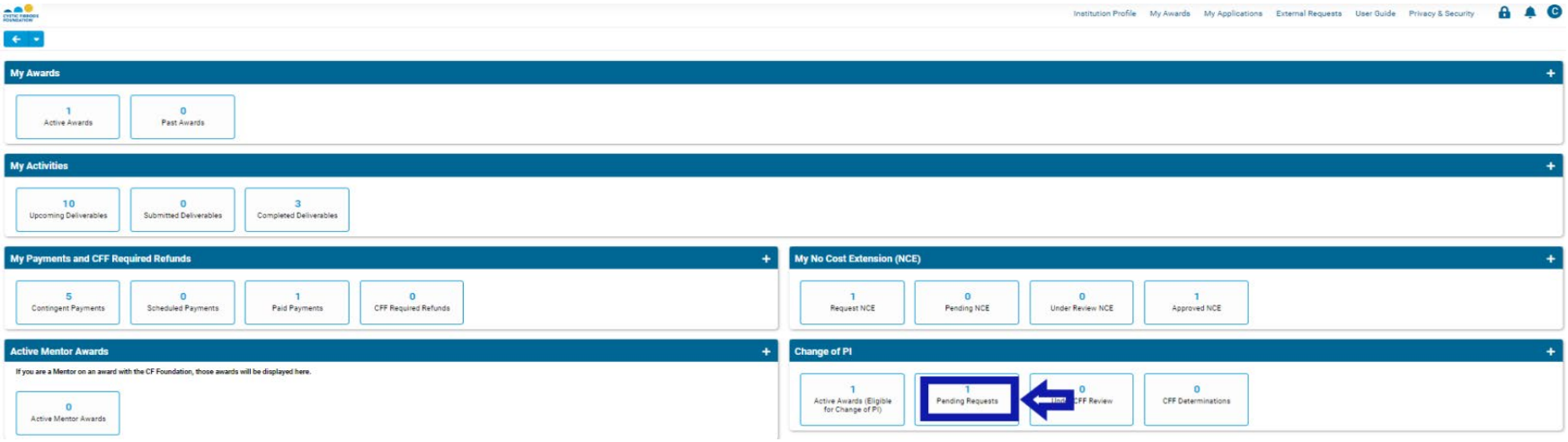
3. When you click on the **Request Change of PI** button, the system will create a Change of PI request in **Pending** status. You will first need to fill out the Last Date of the Current PI and the First Date of the Proposed PI.



4. The next step is to fill out the remaining information on the Change of PI request page. You must enter in the contact information of the Proposed Principal Investigator, the Reason for the Change of Principal Investigator, the **Authorized Institution Official** who will sign off on the Change of PI Request and the Supporting Documents for the Proposed PI. To move the request forward, click the **Submit to PI** button to submit the request to the **current Principal Investigator** for review.



5. The status of the Change of PI request will move from **Pending** status to **Pending PI Acceptance** status. This means that the **Principal Investigator** of the award will need to review the details of the request and submit the Change of PI Request to the **Authorized Institution Official** for review. When the Change of PI request is in **Pending PI Acceptance** status, the **Principal Investigator** of the award will find the **Pending PI Acceptance** Change of PI request in the **Pending Requests** tile under the **Change of PI** module.



6. Under **Pending PI Acceptance** status, the **Principal Investigator** can either Request Revisions or Submit the request to the **Authorized Institution Official**. To approve the request, click on the **Submit to AIO** button.

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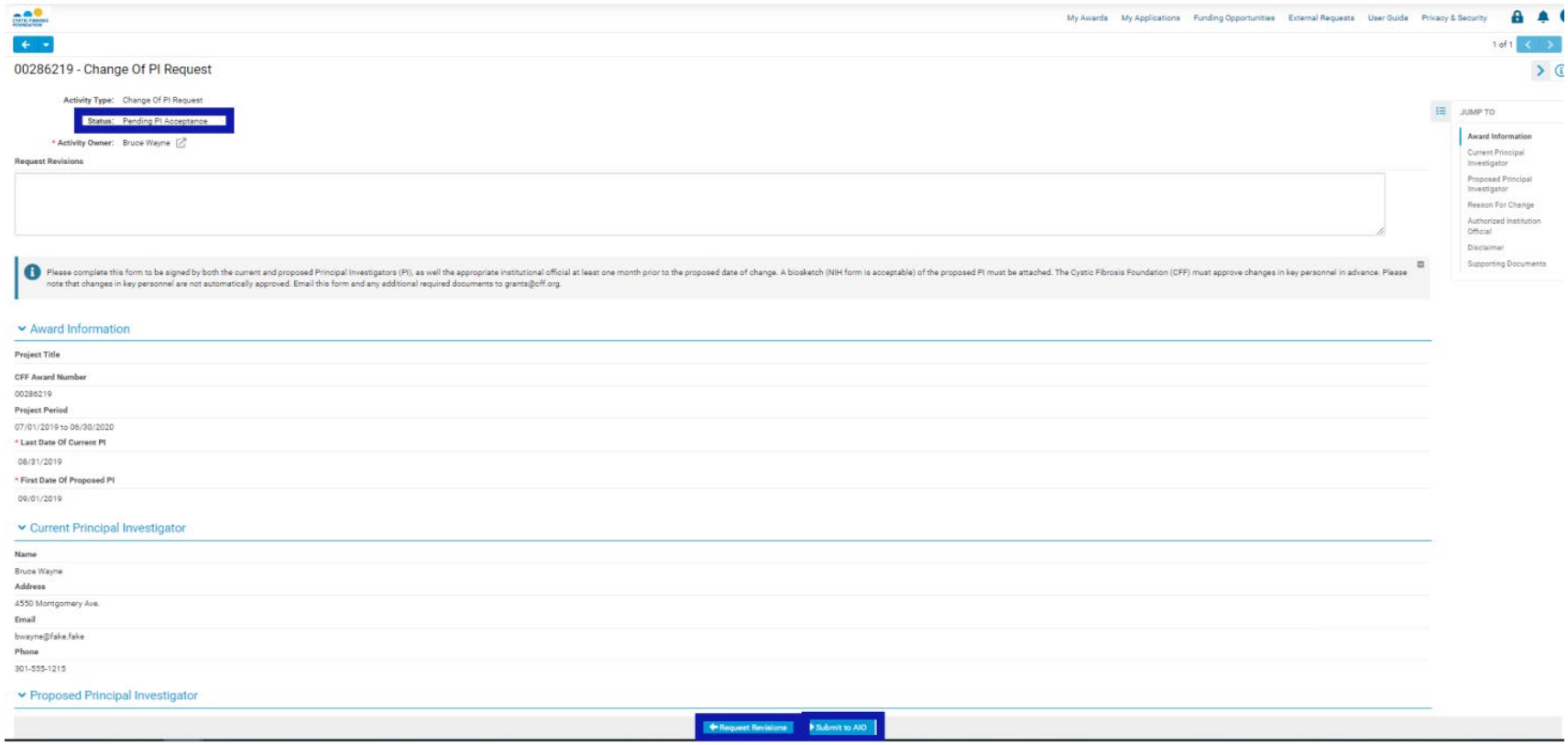

7. The status of the Change of PI request will move from **Pending PI Acceptance** status to **Pending AIO Acceptance** status. This means that the **Authorized Institution Official** of the award will need to review the details of the request and submit the Change of PI Request to the CFF for review and approval. When the Change of PI request is in **Pending AIO Acceptance** status, the **Authorized Institution Official** of the award will find the **Pending AIO Acceptance** Change of PI request in the **Pending Requests** tile under the **Change of PI** module.

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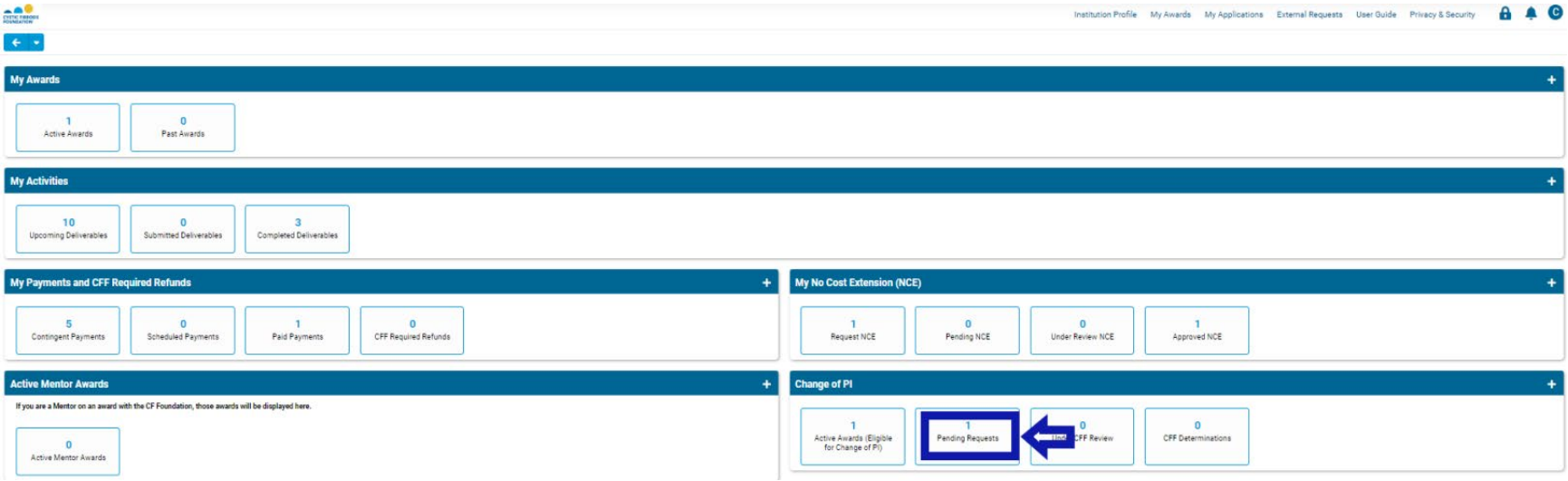
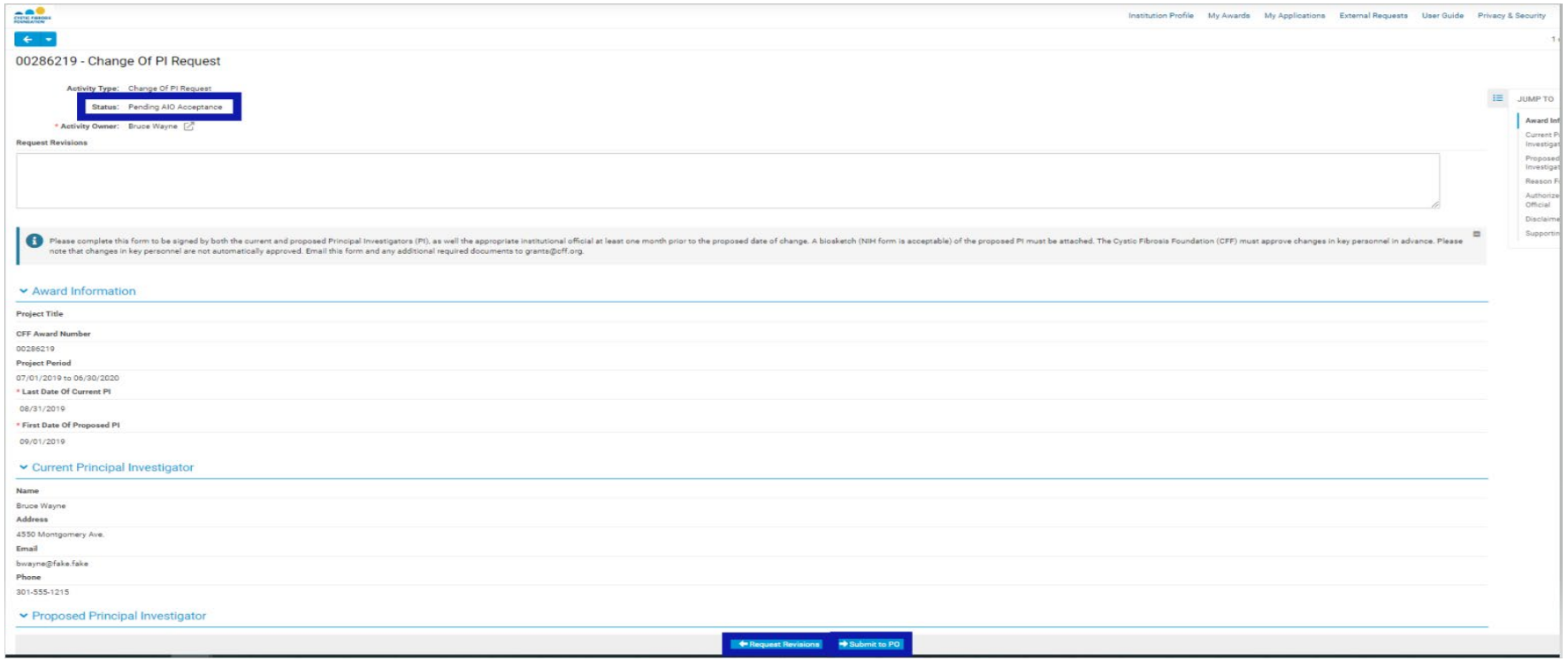


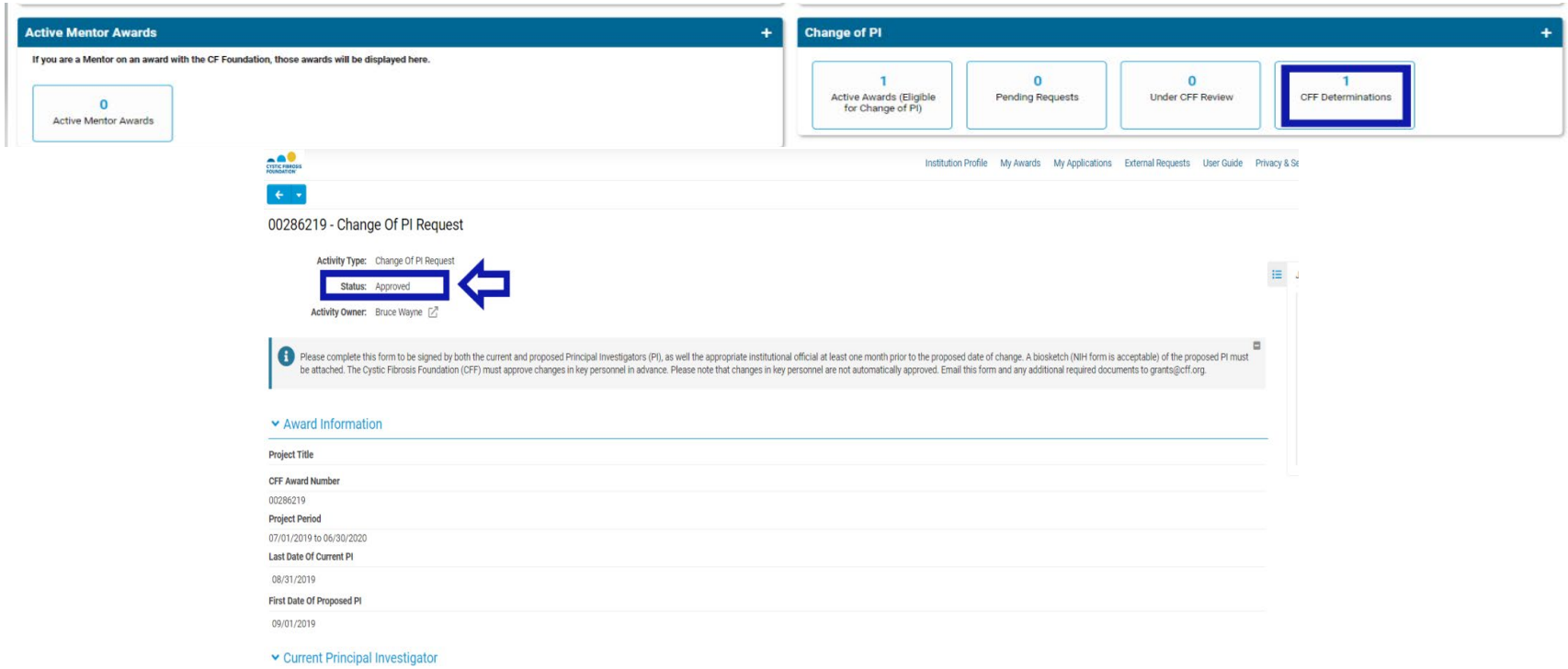
8. When the status of the Change of PI request is in **Pending AIO Acceptance** status, the **Authorized Institution Official** will be able to view all the details entered in for the Change of PI Request. To approve the Change of PI request and submit to CFF for review, the **Authorized Institution Official** will need to provide their attestation under the **AIO Acceptance** section by clicking on the check box. Once that has been completed, the **Authorized Institution Official** can move the Change of PI request to CFF for review by clicking on the **Submit to PO** button. **This is the final step for submitting the Change of PI request for review by CFF.**



9. Once the **<u>Authorized Institution Official</u>** submits the Change of PI request, the status of the Change of PI request will move from **Pending AIO Acceptance** to **Under CFF Program Officer Review** status. This means that the Change of PI is pending review and approval by CFF. All Post-Award contacts associated with the award, who are listed on Page 2 of this guide, will be able to find the Change of PI request in **Under CFF Program Officer Review** status under the **Under CFF Review** tile of their **Change of PI** module.

Change of PI Approval:

1. When the Change of PI request has been **reviewed and approved** by CFF, all Post-Award contacts associated with the award, who are listed on Page 2 of this guide, will be able to find the approved Change of PI request in the **CFF Determinations** tile under the **Change of PI** module. The status of the Change of PI request will be in **Approved** status. This means that the Change of PI request has been approved by CFF and the award the Change of PI has been completed in the system. The **new Principal Investigator** will receive a notification from the system that signifies that the Change of PI has been approved and that the Change of PI Award Letter is pending signature.



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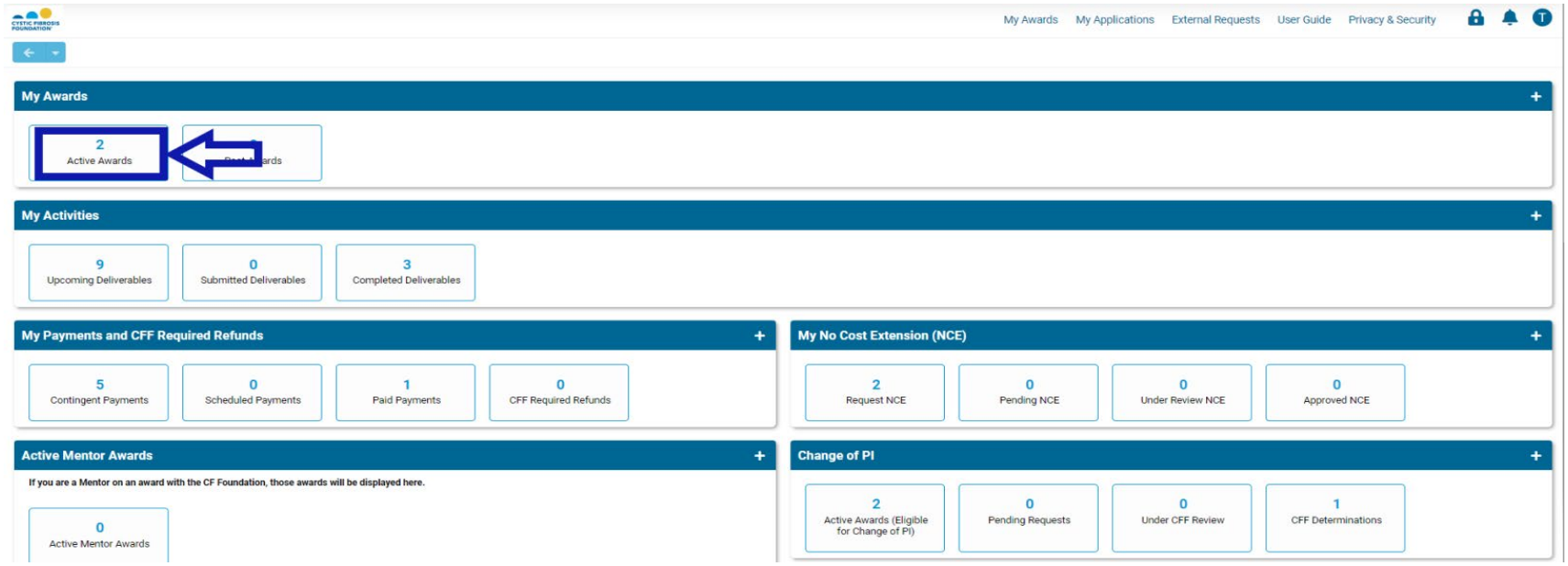
How to Submit a Relinquishment of Award / Transfer of Institution Request

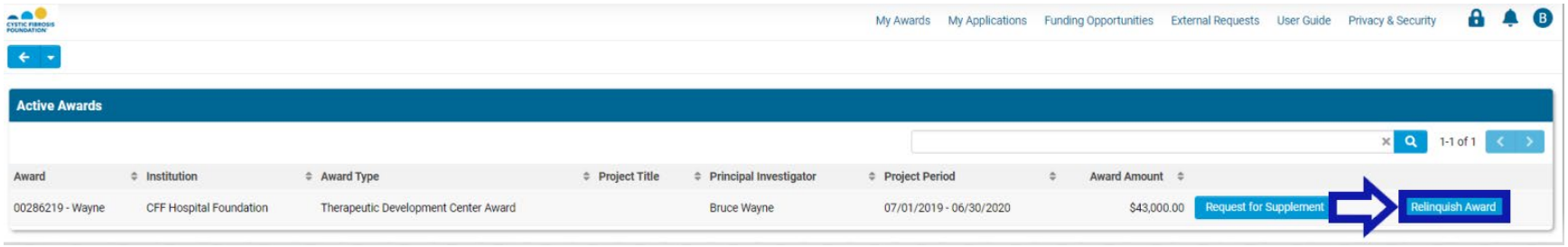
Relinquishment of Award: ***In the event the Awardee Institution terminates an award before the end of the Project period, CFF will review the final report of expenditures to determine if the costs are allowable, applicable, and reasonable for the work completed toward meeting the aims of the Project. CFF will provide the PI and Awardee Institution with the opportunity to address any expenses identified as unallowable. If the Awardee Institution was paid in excess of the amount for which it is eligible under the terms of the award (i.e., due to error, misspent funds or unallowable costs), CFF may require the Awardee Institution to pay back funds and will specify the timeline for repayment. Additionally, CFF has the right to offset such amounts against any payment obligations of CFF to the Awardee Institution, including payments due from CFF under other awards.***

Transfer of Institution: ***Awards may not be transferred from one institution to another without prior written authorization from the CFF Grants & Contracts Management and Administration Office and the Awardee Institution. A transfer of institution must be requested as soon as the PI has determined the date of transfer, but no later than thirty (30) days before the transfer. If CFF and the Awardee Institution approve a transfer, the Awardee Institution must report on all expenditures and return any unexpended funds to CFF before the award letter is released to the new Awardee Institution. To request a Transfer of Institution, you must submit a Relinquishment of Award request through the Grants Management System (awards.cff.org) and signify on the Relinquishment of Award Request that the relinquishment is for a Transfer of Institution.***

1. To request a Relinquishment Request for an Award, go to the **My Awards** module under the **My Awards** homepage and click on the **Active Awards** tile.

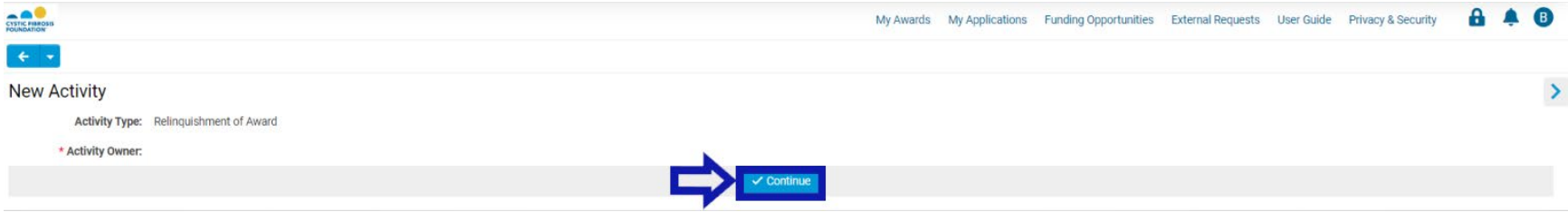


2. On the **Active Awards** page, you will find a list of all awards that you are associated with as a contact. Only the **Grants Officer, Authorized Institutional Official or Principal Investigator** that is associated with the Award Profile can request a Relinquishment Request. Click the **Relinquish Award** button to create a Relinquishment request for that specific award.



PLEASE NOTE: You will only be able to view the award under the **Active Awards** tile only if the **Principal Investigator** of the award has added you as a contact to their award. (For more information, see refer to the guide **"How to Add Contacts"**)

3. When you click on the **Relinquish Award** button, the system will create a Relinquishment request in **Pending** status. To move the request forward, click the **Continue** button.



4. On the Relinquishment of Award page, you will first need to add the **Current Authorized Institution Official** who will sign off on the Relinquishment Request by clicking on the drop-down field and selecting your **Current Authorized Institution Official.** You will next need to enter in the **Date of Relinquishment** by selecting the **Date of Relinquishment** field. After entering in the Date of Relinquishment, you will need to provide an explanation for why this award is being relinquished by entering in the explanation in the **Reason for Relinquishment** field.

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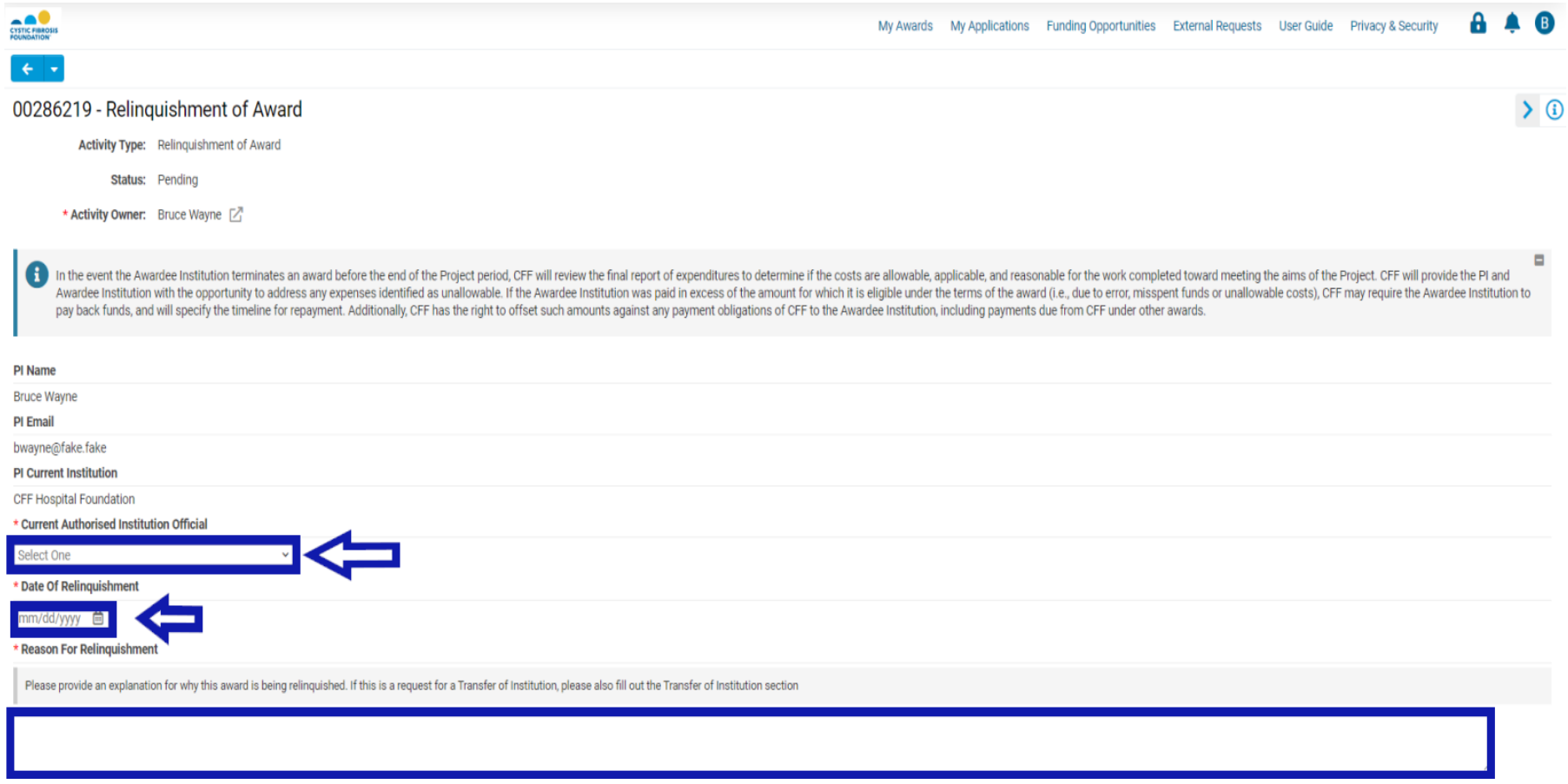

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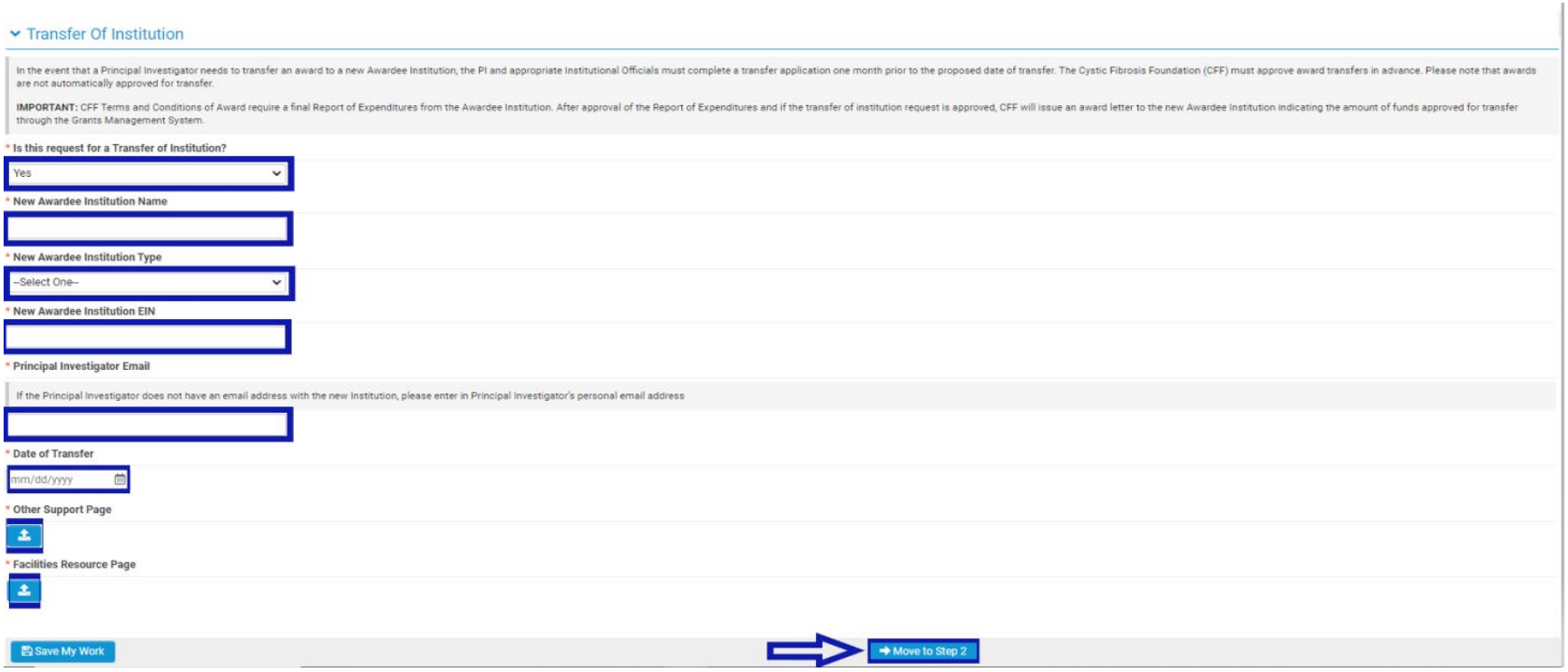
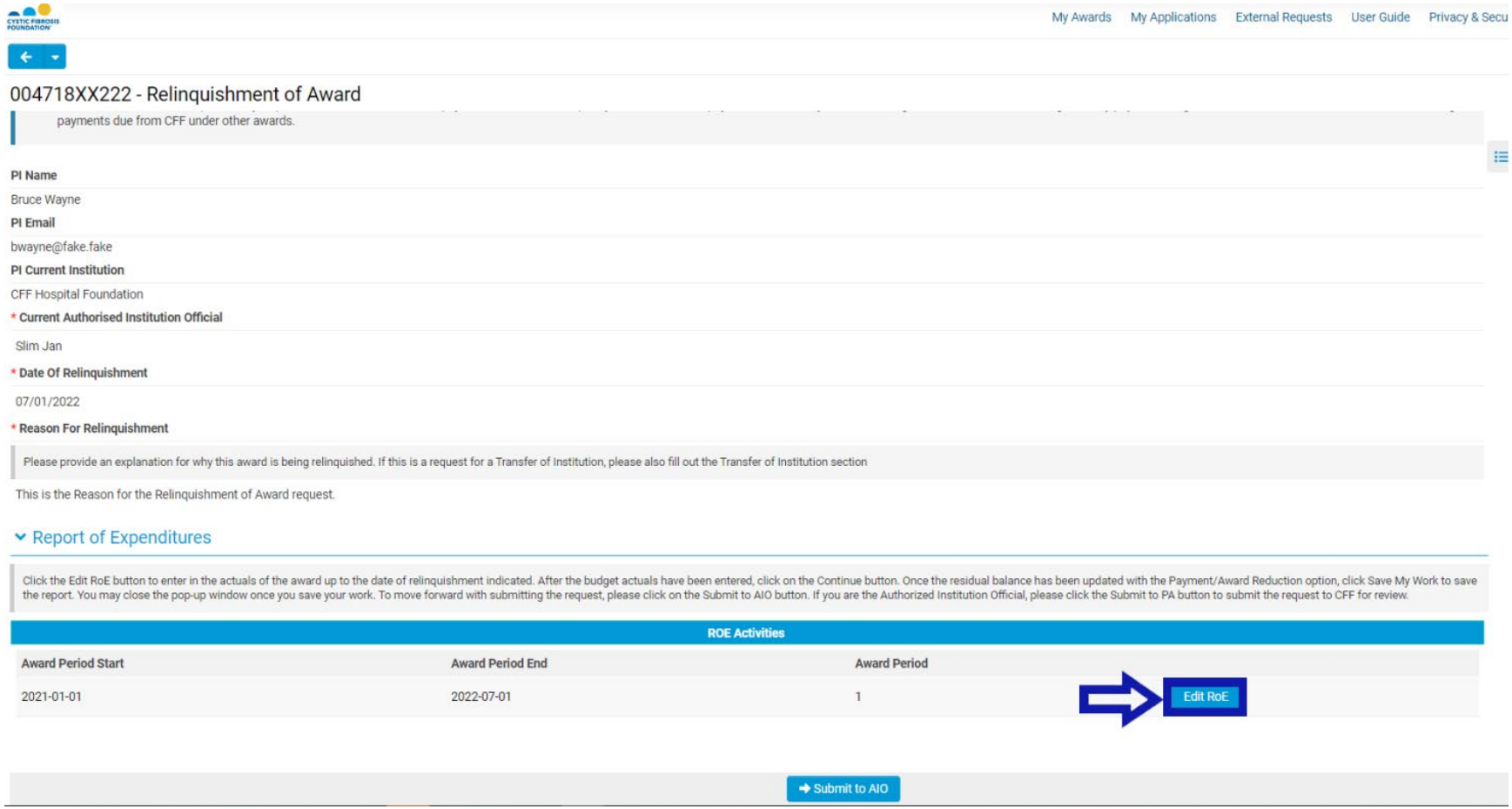
TRANSFER OF INSTITUITON REQUESTS

5. On the Relinquishment of Award page, there will be a **Transfer of Institution** section in which you will need to signify in the drop-down list if this relinquishment request is for a **Transfer of Institution**. If the request is not for a Transfer of Institution, select **No** in the drop-down selection and select **Move to Step 2** to continue the relinquishment request.

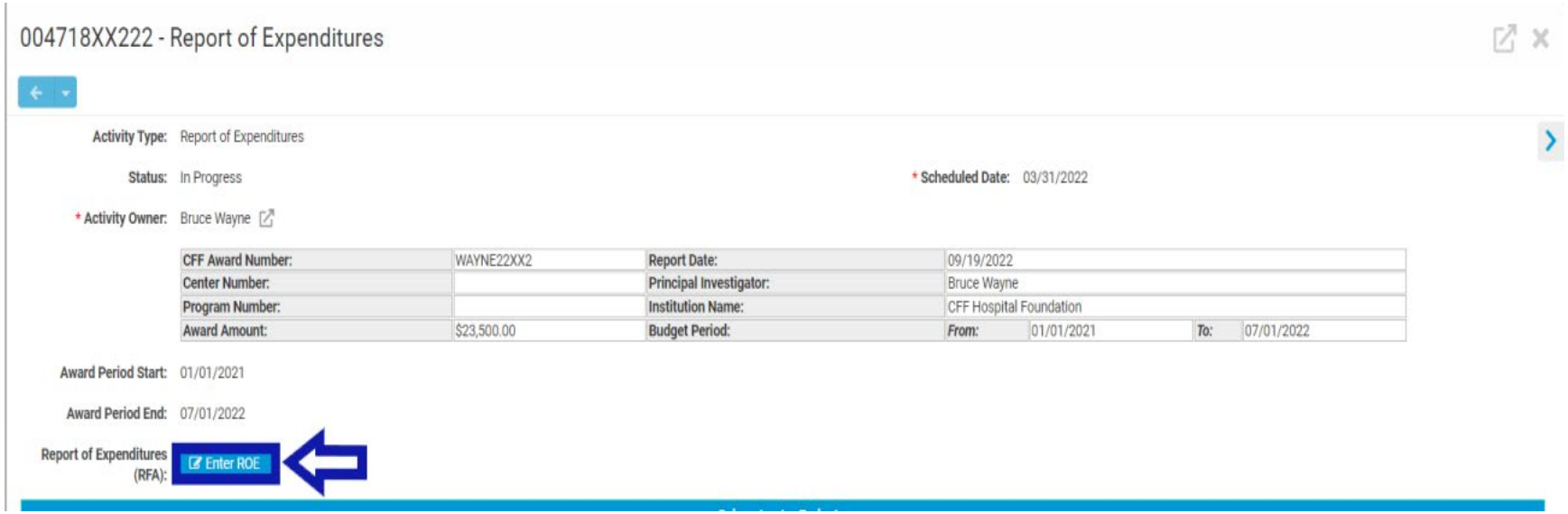
6. If this the request is for a **Transfer of Institution**, select **Yes** in in the drop-down selection. When selecting **Yes**, a fillable form appears on the Relinquishment of Award page in which you will need to fill out all the components for the **Transfer of Institution** request. Once you have completed the **Transfer of Institution** section, select **Move to Step 2** to continue the Relinquishment/Transfer of Institution request.



7. On the next page of the Relinquishment Request, you will find that the system has generated the **Report of Expenditures** for the current performance period up until the **Date of Relinquishment** previously entered. You will need to enter in all the expenditures that occurred for the performance period up until the **Date of Relinquishment** by clicking on the **Edit RoE** button.



8. When you click on the **Edit RoE** button, a pop-up window will appear, and you will need to enter in the actuals of the award up to the **Date of Relinquishment** indicated by clicking on the **Enter ROE** button. After the budget actuals have been entered, click on the **Continue** button in the pop-up window. Once the residual balance has been updated with the Payment/Award Reduction option in the pop-up window, click **Save My Work** to save the report. You may **close the pop-up window** once you save your work. To move forward with submitting the request, click on the **Submit to AIO** button.



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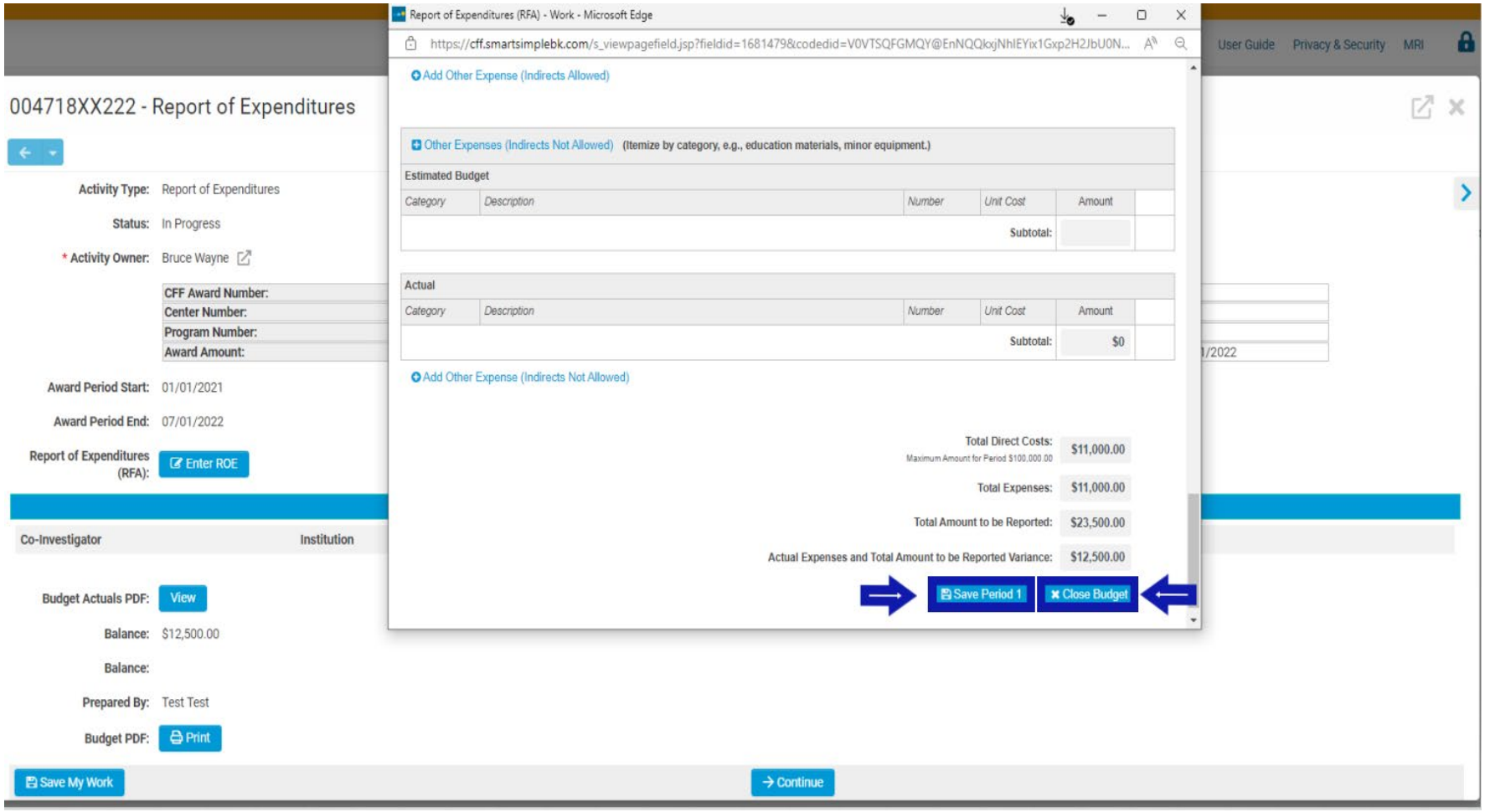

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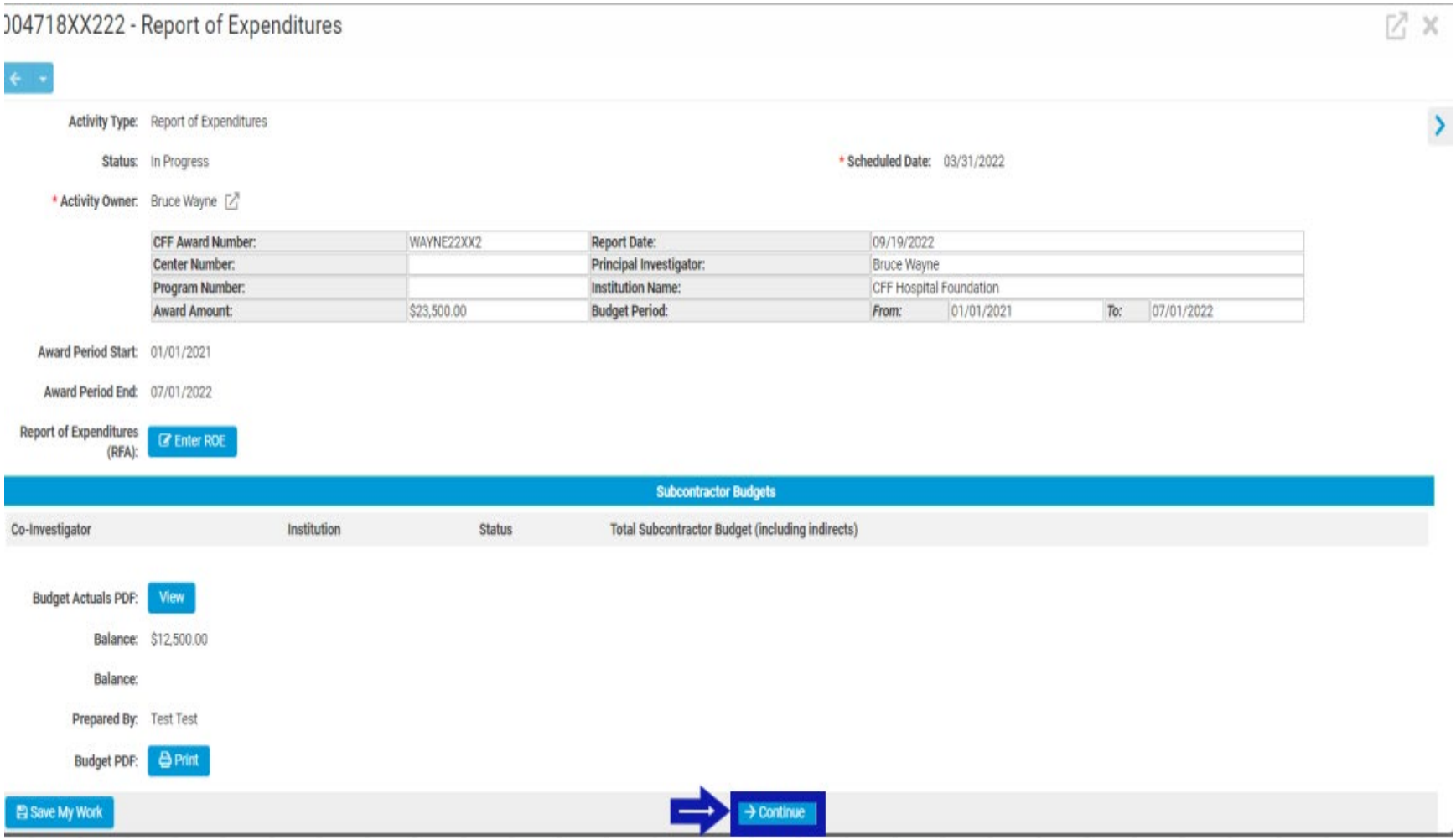

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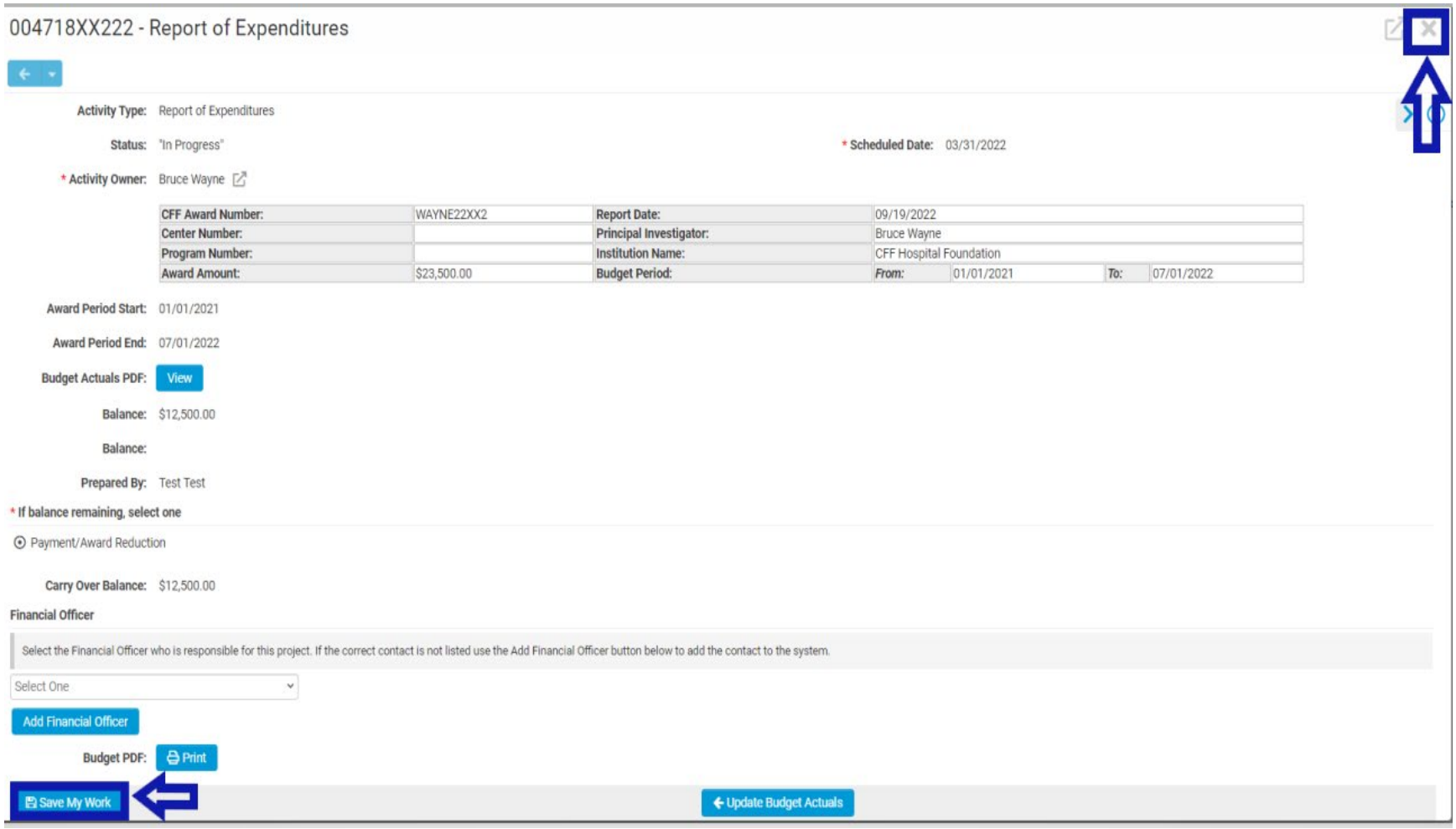
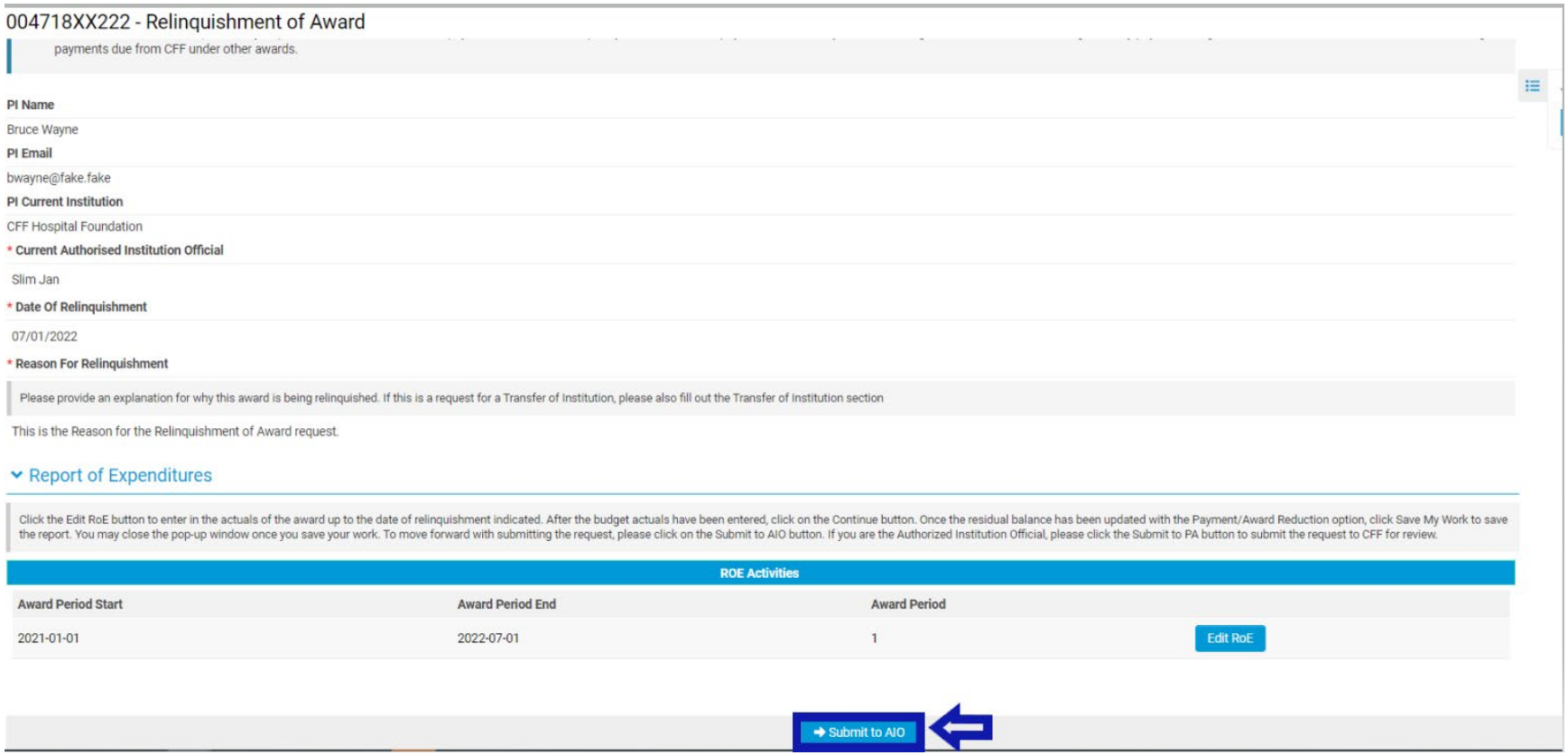
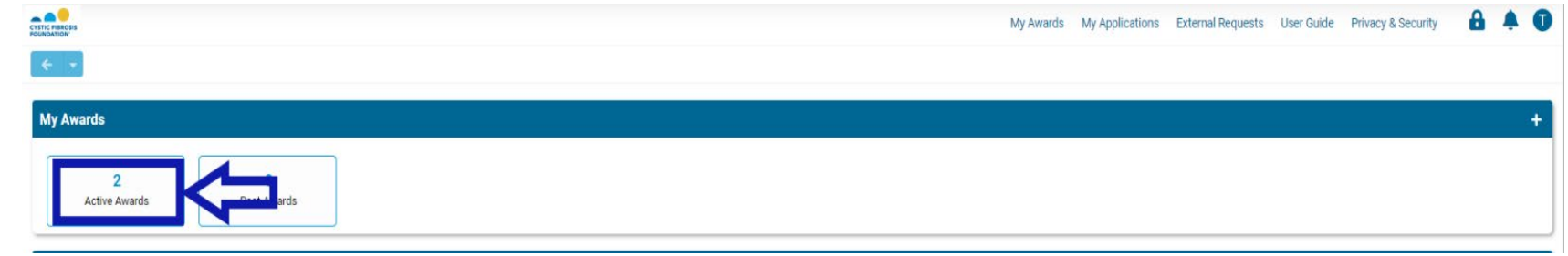
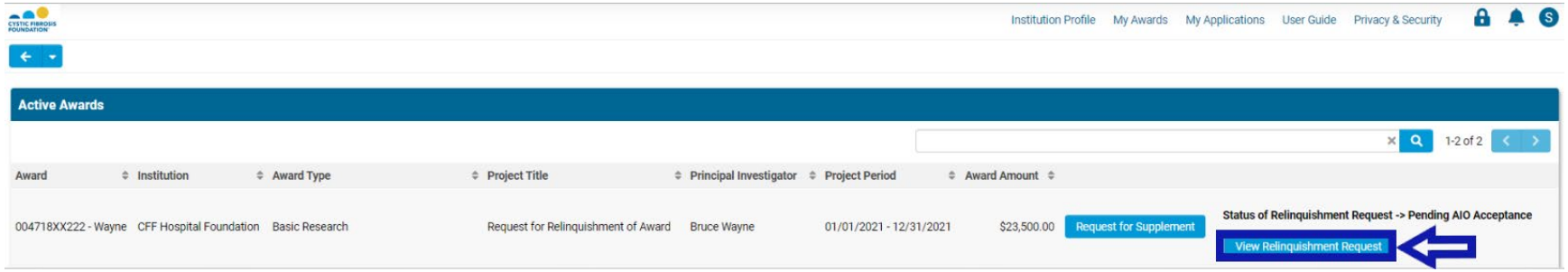


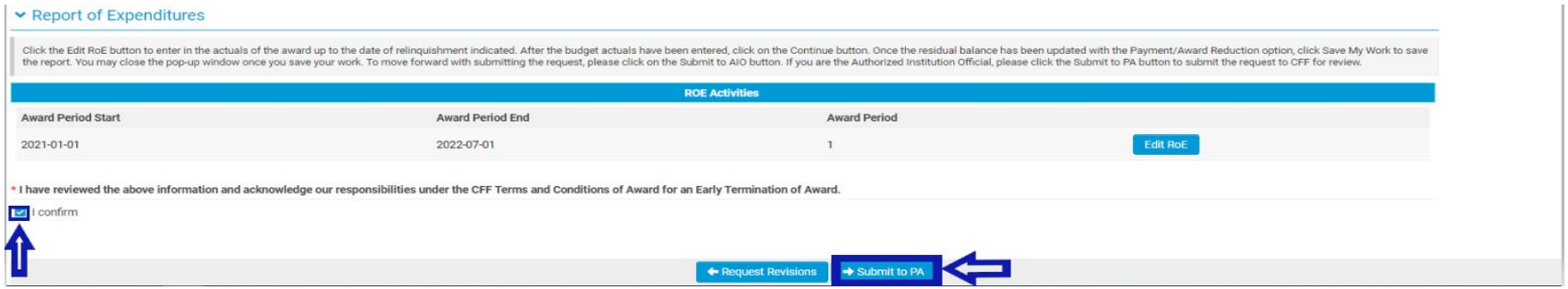


9. The status of the Relinquishment Request will move from **In Progress** status to **Pending AIO Acceptance** status. This means that the **Current Authorized Institution Official** of the award that was added in the initial request will need to review the details of the request and submit the Relinquishment Request to the **CFF Program Administrator** for review. When the Relinquishment Request is in **Pending AIO Acceptance** status, the **Current Authorized Institution Official** of the award will find the **Pending AIO Acceptance** Relinquishment Request in the **Active Awards** tile under the **My Awards** module.

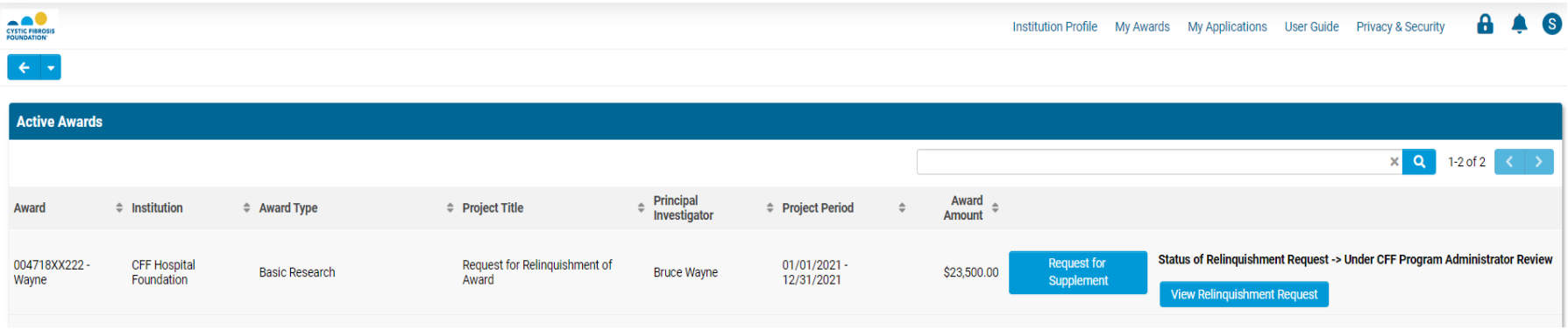




10. Under **Pending AIO Acceptance** status, the **<u>Current Authorized Institution Official</u>** can either Request Revisions or Submit the request to the **CFF Program Administrator for review**. To approve the request and submit for CFF review, the Current Authorized Institution Official will need to provide their attestation at the bottom of the page and click on the **Submit to PA** button.

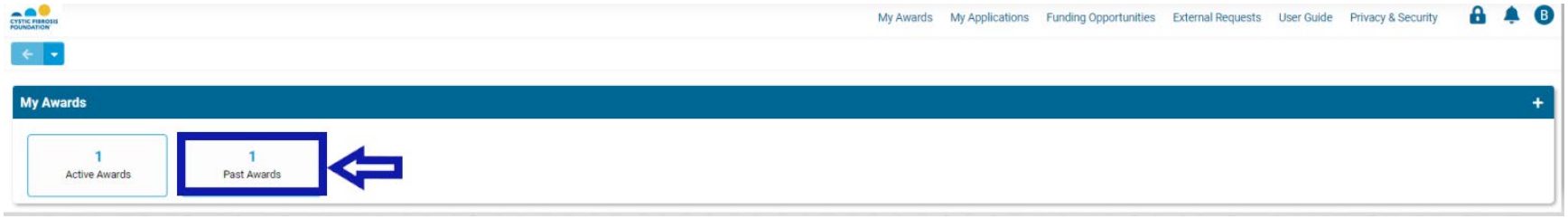


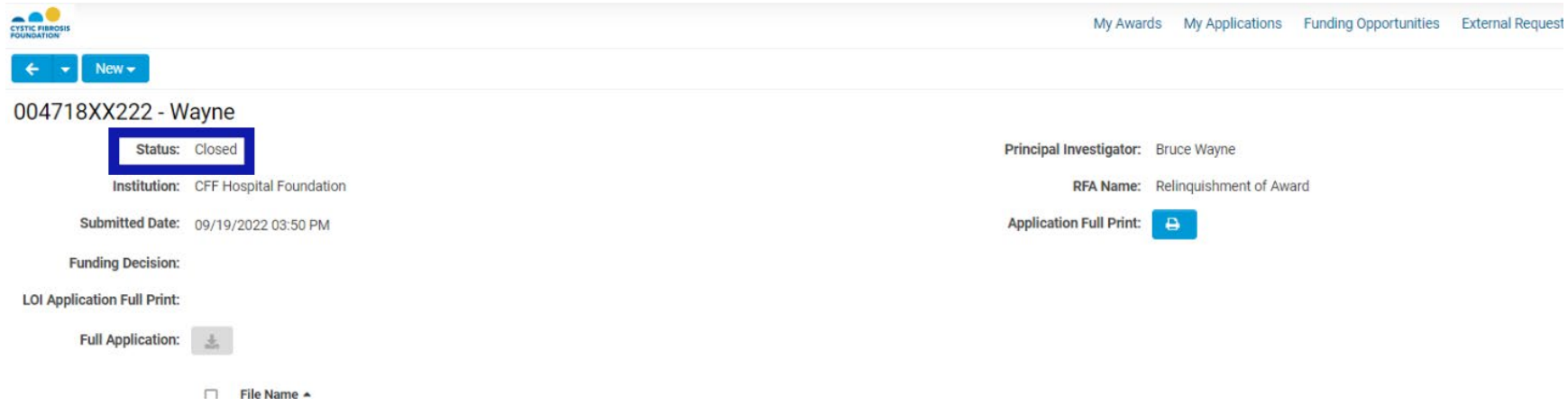
11. The status of the Relinquishment Request will move from **Pending AIO Acceptance** status to **Under CFF Program Administrator Review** status. This means that the Relinquishment Request is currently pending review by the **CFF Program Administrator**.



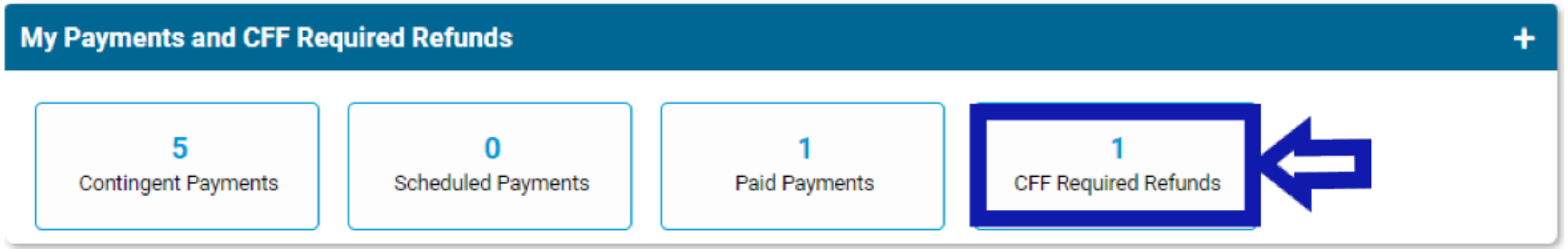
Relinquishment Request / Transfer of Institution Approval:

When the Relinquishment Request has been **reviewed and approved** by CFF, a notification will go out of the system to the **Principal Investigator, Grants Officer, and Authorized Institution Official** stating that the **Relinquishment Request** has been approved and that the award is now **Closed.** You can find historical record of the Award by going to the **My Awards** module and selecting the **Past Awards** tile.





PLEASE NOTE: If the expenditures entered in for the **Relinquishment of Award** performance period is less than the amount paid to your Institution by the CF Foundation, a refund check will be due. You may find the refund check request under your **My Payments and CFF Required Refunds** module under the **CFF Required Refunds** tile.



Transfer of Institution: When a Transfer of Institution is approved alongside the relinquishment request, the Principal Investigator will receive a notification that the Change of Institution Award Letter has been issued. The Principal Investigator will log in with their new email address (email address signified on the Transfer of Institution Request) and will be able to view the Active Award as well as all deliverables / payments associated with the Transfer of Institution award.

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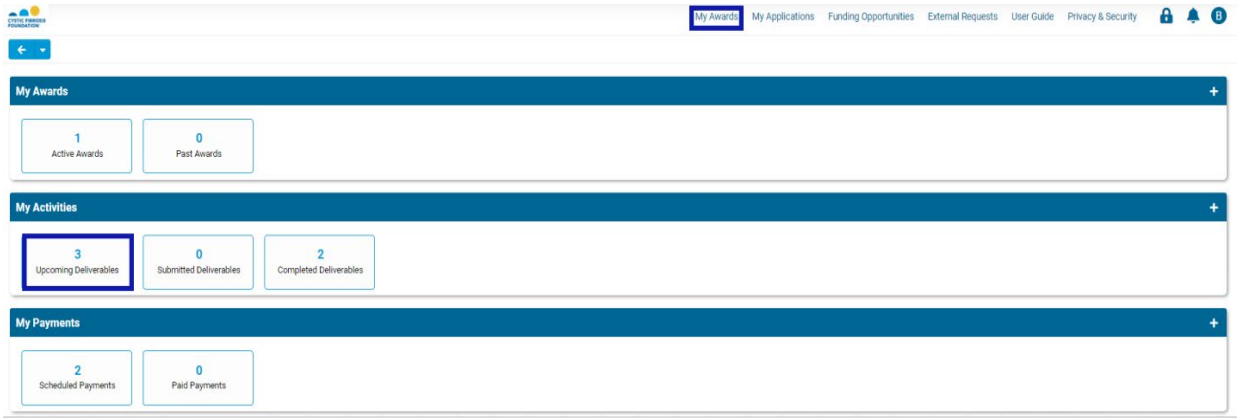
How to Edit Subcontractor Budgets for the Report of Expenditures and Renewal Budget & Progress Reports

Subcontractor budget(s) associated to an award record are initially entered in at the application phase of the award. When the application is approved to fund, the subcontractor budget(s) will be available to view/edit once the award has been issued. The subcontractor budget(s) will be available to view/edit when completing the Renewal Budget & Progress Report and the Report of Expenditures. For applications/awards that include a subcontract with a third party, the applicant/awardee may request indirect costs on the first $25,000 of each subcontract per project period. Negotiations of subcontracts are between the applicant institution and the subcontractor.

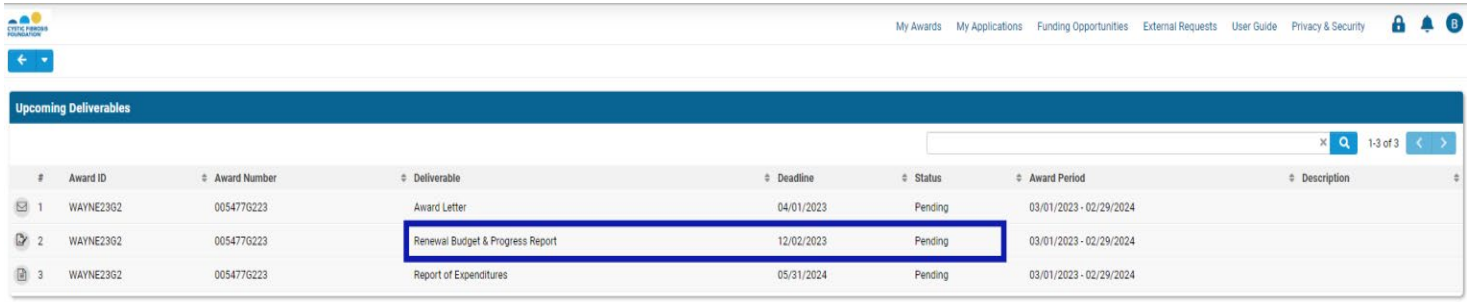
Renewal Budget & Progress Reports - Subcontractor Budgets

(Please refer to the guide "How to Complete the Renewal Budget & Progress Report" for further guidance on the submission of the Renewal Budget & Progress Report)

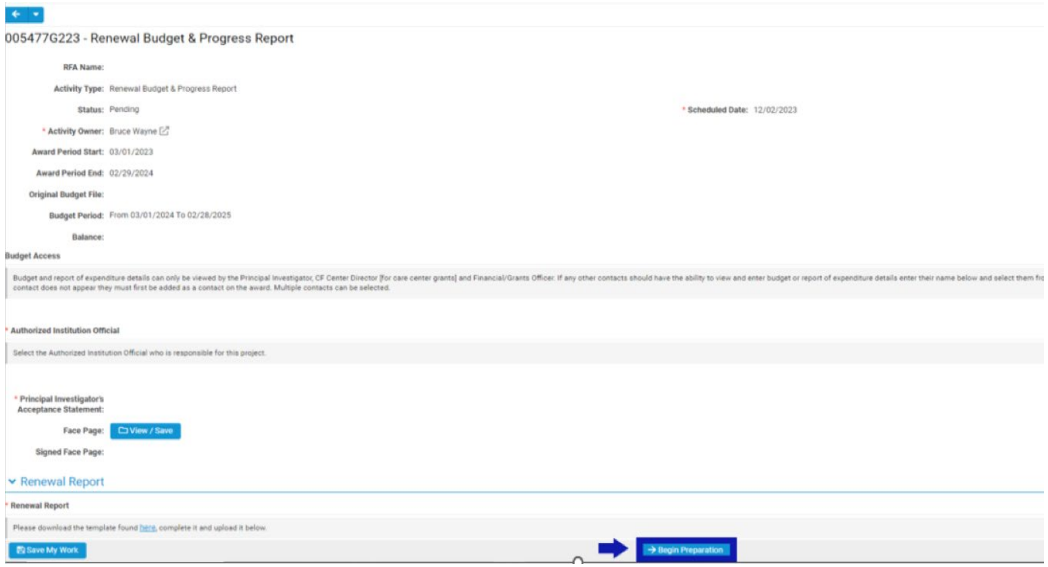
1. You may find all pending deliverables including your Renewal Budget & Progress Report by clicking on **Upcoming Deliverables** under **My Activities**. **PLEASE NOTE**: You will only be able to view deliverables associated to an Award if the **Principal Investigator** has added you as a contact to their award (For more information, refer to "How to Add Contacts" guide)



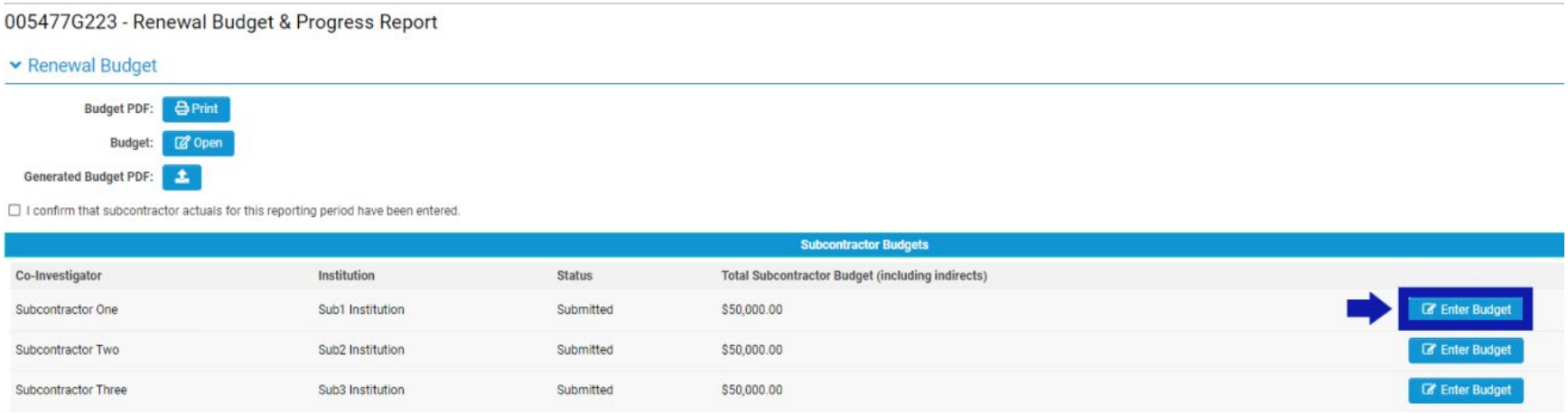
2. The **Upcoming Deliverables** page lists all outstanding deliverables for a given award. To begin, select the **Renewal Budget & Progress Report** in **Pending** status.



3. On the Renewal Budget & Progress Report page, select **Begin Preparation**. This will update the status of the Renewal Budget & Progress Report to ***In Progress***.



4. When the **Renewal Budget & Progress Report** is in ***In Progress*** status, you will be able to view/edit the Subcontractor Budget(s) associated with the award record. To view/edit a Subcontractor Budget, select **Enter Budget** next to the Subcontractor Budget line-item.
PLEASE NOTE: Only the **Principal Investigator**, **Financial Officer, or Grants Officer** can edit the Subcontractor Budget. If you are a contact that needs to enter in the budget, you must request **Budget Access** from the **Principal Investigator** (Refer to the guide "How to Grant Budget Access").



5. In the Subcontractor Budget pop-up window, select the **Award Period Year** that the **Renewal Budget & Progress Report** is reporting on (the Budget Period Year). Enter in all the budget details of the Subcontractor Budget including the Indirect Costs (if applicable). Select **Save** then **Close Budget** to close the Subcontractor Budget pop-up window. Select **Save My Work** on the **Renewal Budget & Progress Report** page to save the budgetary information entered in the Subcontractor Budget details.
PLEASE NOTE: The Subcontractor Budget pop-up window WILL NOT allow you to edit any budget details for the previous or future award period year(s) of the award. The Subcontractor Budget pop-up window will only allow you to edit the Subcontractor Budget details of the award period that correlates to the Renewal Budget & Progress Repot budget period.

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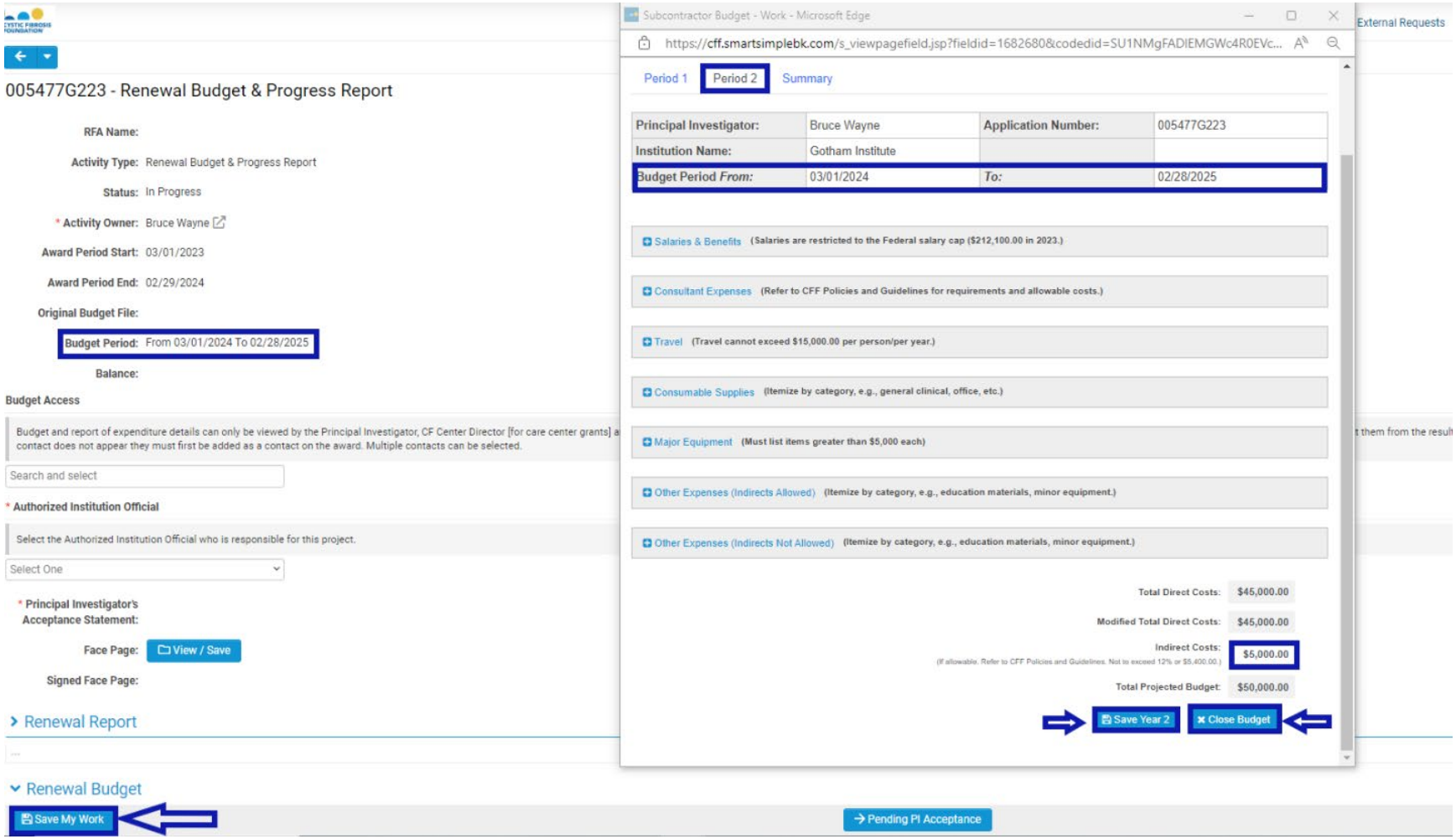
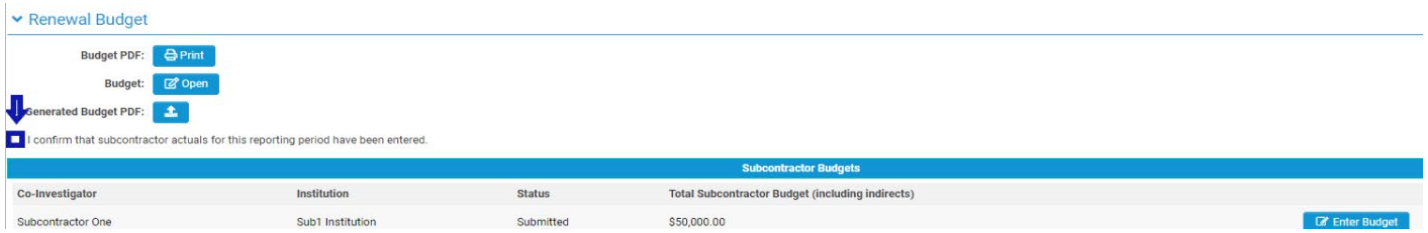
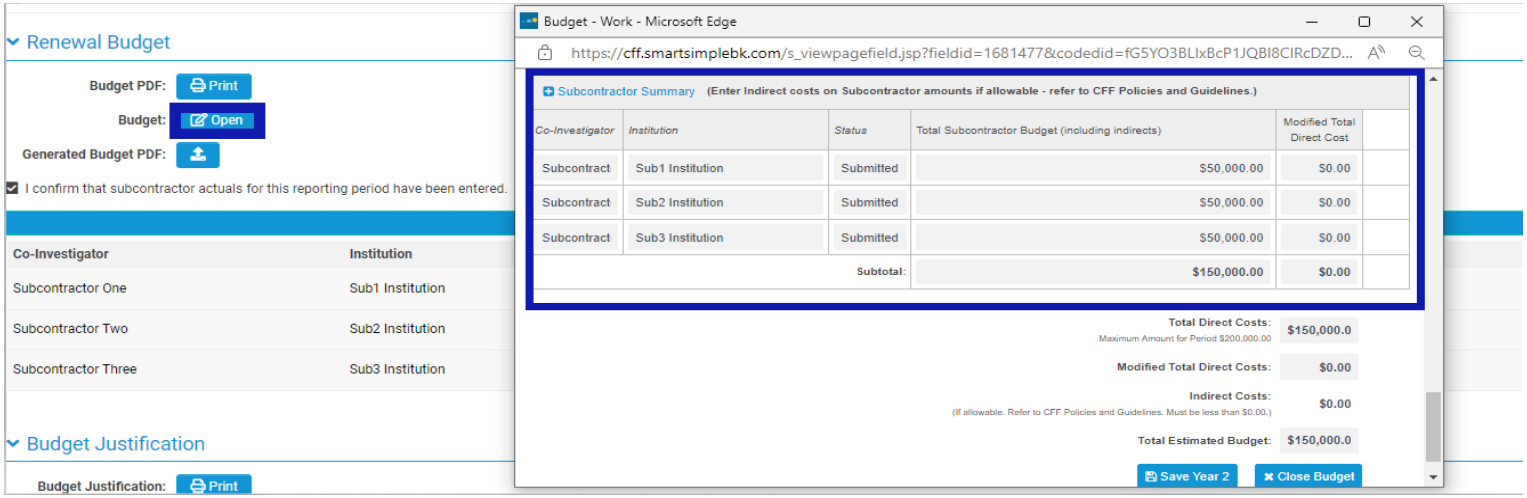


6. Once the Subcontractor Budget(s) have been entered in, select the check box next to "*I confirm that subcontractor actuals for this reporting period have been entered.*" to acknowledge that the Subcontractor Budget(s) related to the **Renewal Budget & Progress Report** budget period have been reviewed.



7. To view the Total Summary of the Subcontract Budget(s), select **Open** next to the **Budget** field to open the **Renewal Budget & Progress Report** renewal budget detail. Under the **Subcontractor Summary** expense category, you will find your updated Subcontractor Budget(s) **Total Subcontractor Budget** amount(s) and the **Modified Total Direct Cost** of the Subcontractor Budget(s). The Subcontractor Budget(s) for the **Renewal Budget & Progress Report** are now ready to submit as part of the renewal budget.



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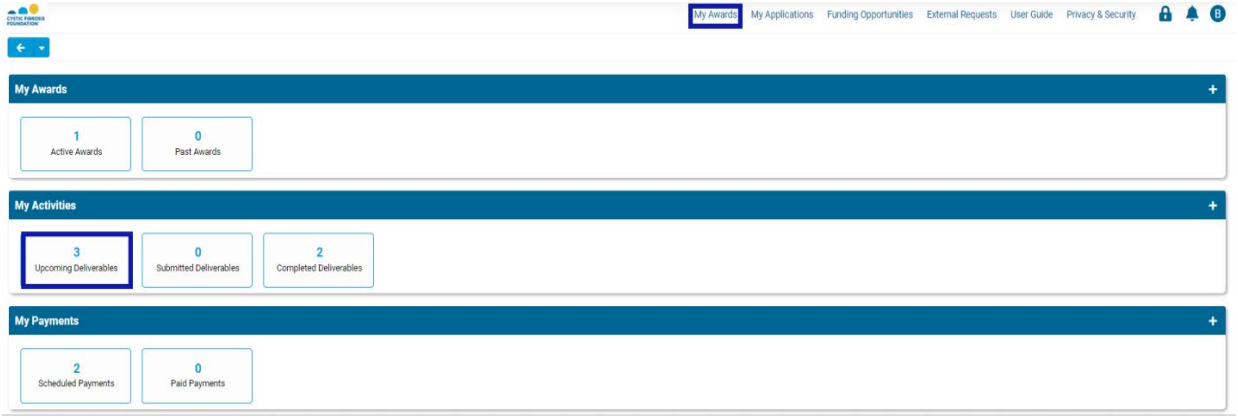
Report of Expenditures - Subcontractor Budgets

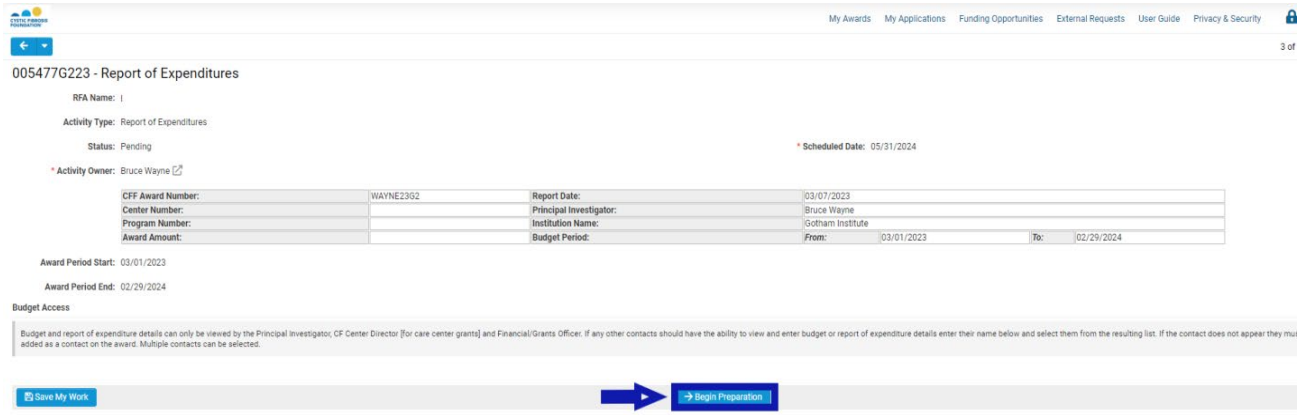
(Please refer to the guide "How to Enter in Financial Reports" and "How to Enter in the Report of Expenditures" for further guidance on the submission of the Report of Expenditures)

1. You may find all pending deliverables including your **Report of Expenditures** by clicking on **Upcoming Deliverables** under **My Activities**. **PLEASE NOTE**: You will only be able to view deliverables associated to an Award if the **Principal Investigator** has added you as a contact to their award (For more information, refer to "How to Add Contacts" guide)

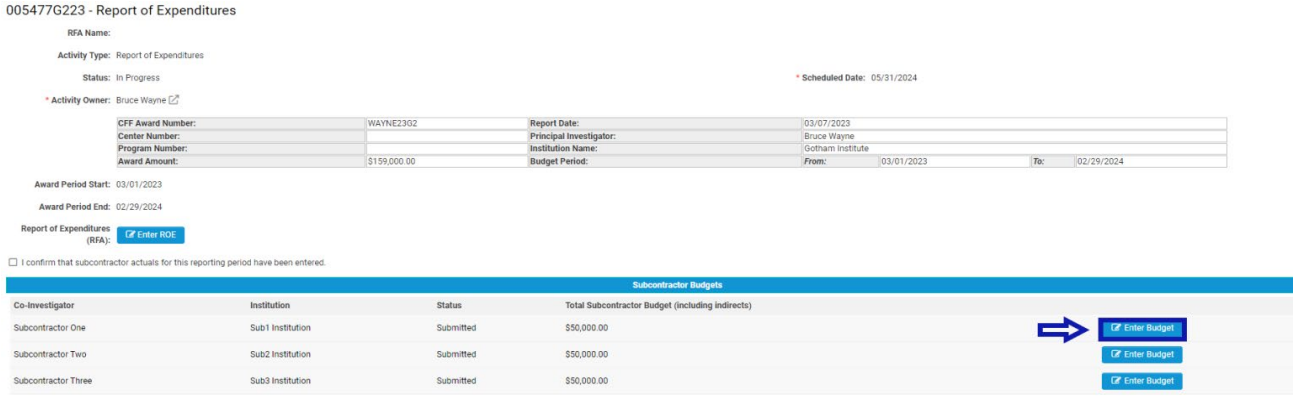


2. The **Upcoming Deliverables** page lists all outstanding deliverables for a given award. To begin, select the **Report of Expenditures** in **Pending** status.

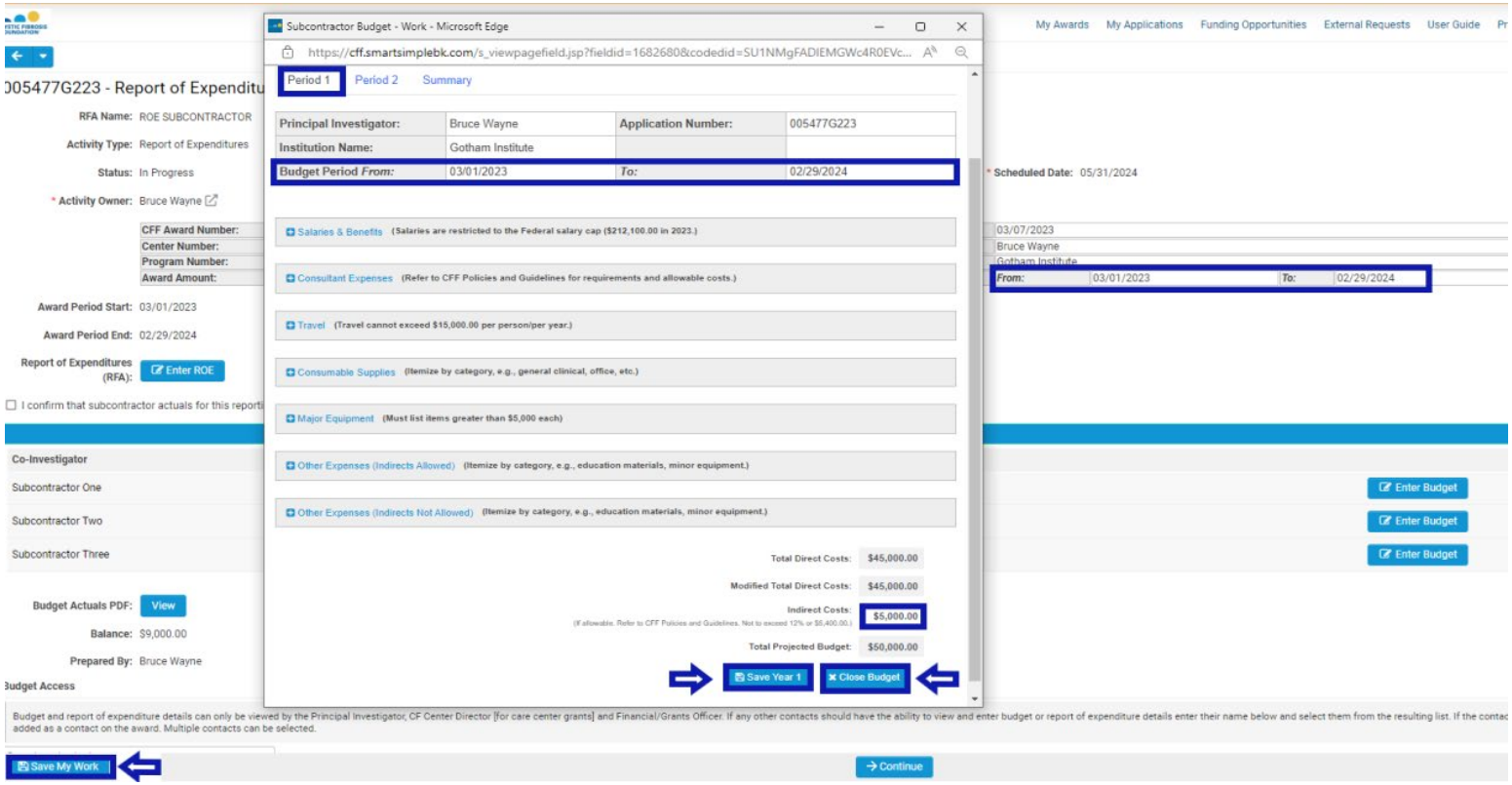
3. On the Report of Expenditures page, select **Begin Preparation**. This will update the status of the Report of Expenditures to ***In Progress***.



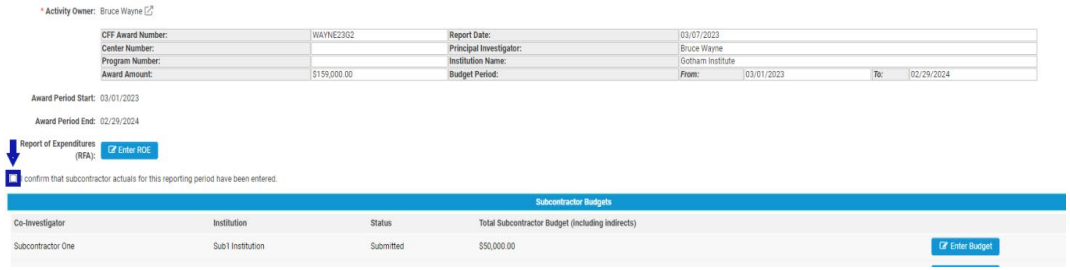
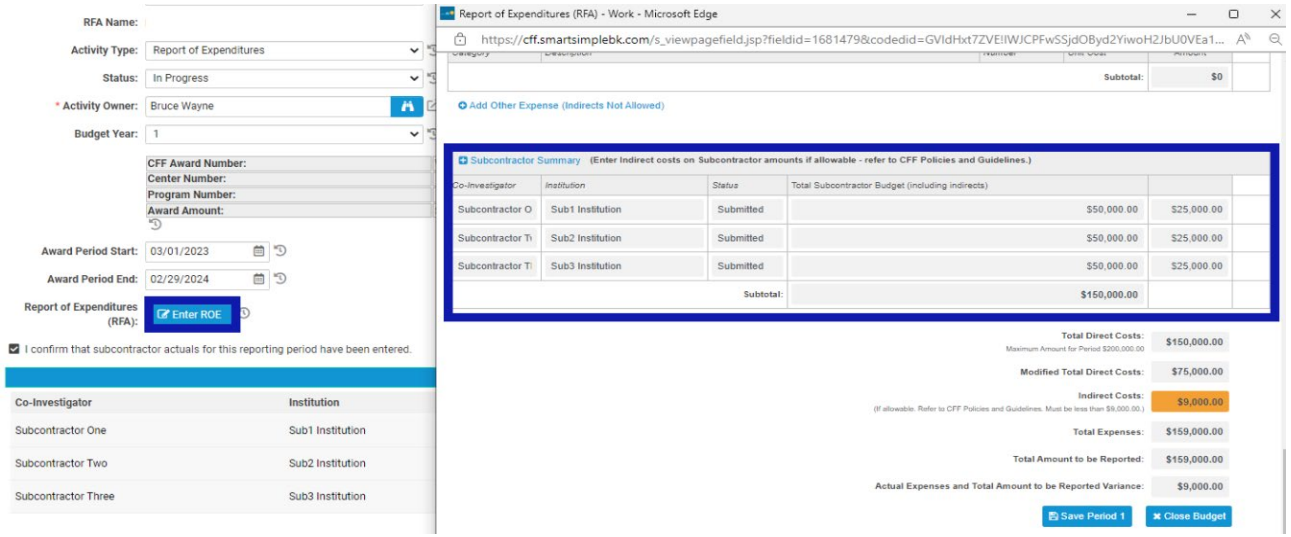
4. When the **Report of Expenditures** is in ***In Progress*** status, you will be able to view/edit the Subcontractor Budget(s) associated with the award record. To view/edit a Subcontractor Budget, select Enter Budget next to the Subcontractor Budget line-item.
PLEASE NOTE: Only the **Principal Investigator**, **Financial Officer**, or **Grants Officer** can edit the Subcontractor Budget. If you are a contact that needs to enter in the budget, you must request Budget Access from the **Principal Investigator** (Refer to the guide "How to Grant Budget Access").



5. In the Subcontractor Budget pop-up window, select the **Award Period Year** that the **Report of Expenditures** is reporting on (the Budget Period Year). Enter in all the budget details of the Subcontractor Budget including the Indirect Costs (if applicable). Select **Save** then **Close Budget** to close the Subcontractor Budget pop-up window. Select **Save My Work** on the **Report of Expenditures** page to save the budgetary information entered in the Subcontractor Budget details.
   PLEASE NOTE: The Subcontractor Budget pop-up window WILL NOT allow you to edit any budget details for the previous or future award period year(s) of the award. The Subcontractor Budget pop-up window will only allow you to edit the Subcontractor Budget details of the award period that correlates to the Report of Expenditures budget period.



6. Once the Subcontractor Budget(s) have been entered in, select the **check box** next to "*I confirm that subcontractor actuals for this reporting period have been entered*." to acknowledge that the Subcontractor Budget(s) related to the **Report of Expenditures** budget period have been reviewed.



7. To view the Total Summary of the Subcontract Budget(s), select **Enter ROE** next to the **Report of Expenditures** field to open the **Report of Expenditures**. Under the **Subcontractor Summary** expense category, you will find your updated Subcontractor Budget(s) **Total Subcontractor Budget** amount(s) and the **Modified Total Direct Cost** of the Subcontractor Budget(s). The Subcontractor Budget(s) for the **Report of Expenditures** are now ready to submit as part of the expenditure report.