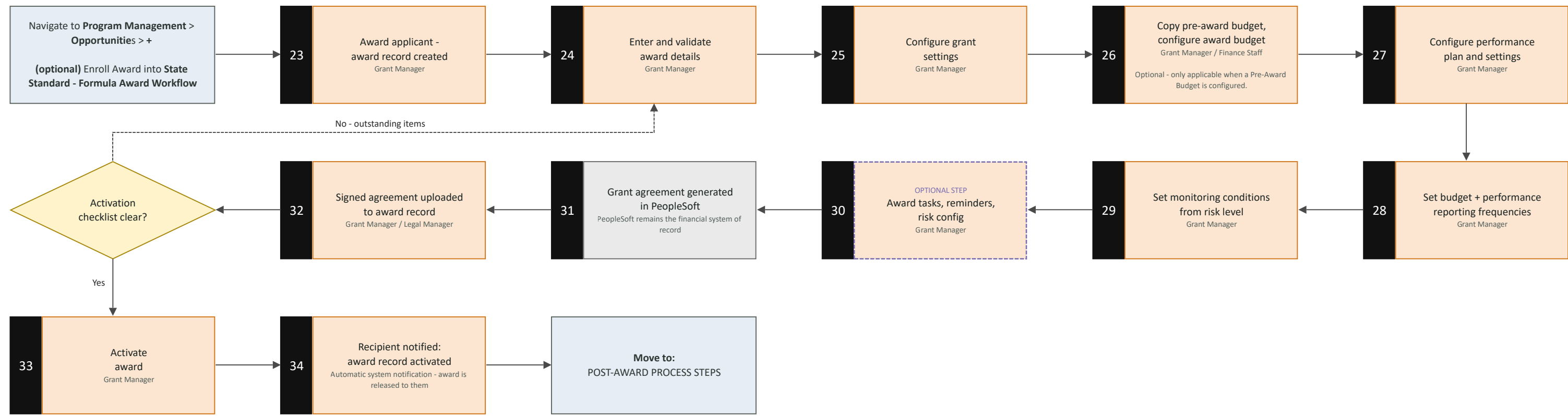


FORMULA AWARD PROCESS STEPS

Indiana State Standard - Euna Grants - Pre-approved award creation to activated award



NEGOTIATION SITS ACROSS THIS WHOLE PAGE - IT IS NOT A SYSTEM STEP

Negotiation with the recipient is an agency and program specific conversation that happens offline, alongside steps 23 to 31, and only where a program wants to facilitate it.

Not every program negotiates. Whatever is agreed gets locked into the award amount, budget and performance details before the award is activated, so that what the system holds matches what is signed in the PeopleSoft contract.

Euna can hold the audit trail through notes, documents, tasks or the email manager.

AWARD SETUP CHECKLIST - STEPS 24 TO 32

- Award details entered and validated: awarded amount, funding source allocations, project dates and grant codes
- Grant settings configured for the program
- Pre-award submission budget copied into the post-award budget and then adjusted. The submitted budget itself is never changed
- Performance plan entered: scope summary, deliverables, measures and activities
- Budget and performance reporting frequencies set: monthly, quarterly, semi-annually or annually
- Optional award tasks, reminders and risk configuration added
- Grant agreement generated in PeopleSoft
- Signed agreement uploaded to award record

BEFORE AN AWARD CAN BE ACTIVATED

- Signed grant agreement uploaded to the award record
- Purchase order or requisition in place where the program requires one
- Eligibility and clearance acknowledgement task completed
- Negotiated award amount, budget and performance details locked in
- Activation is a deliberate button press by a grant manager

TWO SEPARATE NOTIFICATIONS GO TO THE RECIPIENT

The first system notification is sent automatically at step 15 of the Pre-Award process, when the application reaches the approved queue.
The second system notification is sent automatically at step 34 when the grant manager activates the configured award record.

APPROVED IS NOT THE SAME AS ACTIVATED

"Approved" is the internal decision to award.
funding stream is **NOT** yet available to the recipient, and they cannot log expenses or submit reports, until the award record is activated at step 33.

HOW TO READ THIS DIAGRAM



Pre-award step



Award step



Post-award step



Decision point



Rejection path



External system



Continues on another page

Role Matrix

- Grant Manager - runs the program end to end; publishes opportunities, assigns staff, approves and activates
- Division Director - all grant manager abilities; assigns reviewers, approves amendments, owns key program settings
 - Reviewer / Scorer - scores applications they are assigned to; sees nothing else
- Finance Staff - processes fiscal reports, requisition worksheets and purchase orders
- Finance Manager - administers financial accounts and oversees payments being processed
 - Legal Manager - reviews and approves grant agreements and amendments
 - Executive Director - reviews and signs grant agreements and amendments
- Applicant / Recipient - the outside organization applying for and then managing the award