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**Document Title: Grants Department Contacts Maintenance – Job Aid**

**Original date:**

**Date Revised: August 31, 2022**

**Next Revision/Review Date: August 31, 2023**

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**Associate Vice President, Sponsored Programs Administration**

**Office of Business Affairs**

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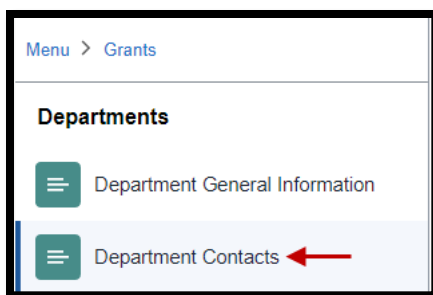
The Sponsored Programs Administration office (SPA) has requested a custom Notification Report to be generated from the PS Grants Module in order to enhance the communication to the Research community and campus departments on pertinent Award Information like Award Setup, Contract Amendments, Award Terms & Conditions, Budget details and other important status updates relevant to the Grant/Contract during the life of the Award.

The Grant Voucher or Notification Report is generated by the SPA Research Award Accountant (RAA) or any member within the SPA office, when it is deemed necessary to inform the Award PI and the Award Department Contacts (mentioned in detail below) on Award Data that either has been newly setup or modified.

This Job Aid is intended for the Department Financial Administrators, Financial Managers, Administrative Coordinators to maintain a list of Grant Voucher Report Recipients/Department Financial Contacts, as determined and maintained by the Department Financial Manager or Department Administrator.

***Please note that, by default, the Award PI will always be notified and therefore should not be added as a Grant Department Contact.***

The Department contacts are maintained by the respective research department Financial Manager/Administrator/Coordinator, within the PS Financials Grants module pages: **Main Menu > PeopleSoft Financials > Grants > Departments > Contacts**



**The Department Contacts are setup based on the Grants' Project Department ID.**

The first step is to identify the Department ID which has been associated for your Grant and then navigate to **Main Menu > PeopleSoft Financials > Grants > Departments > Contacts**

Any individual who actively manages the Sponsored Research for a department can request the PS Security Role of **UT D GM Department Contacts** via a ServiceNow Request to the PS Security Team and having this PS Role will grant you access to view/edit and add department contacts to the Grants > Departments > Contacts page.

In order for the Grants Notification Report to be received by the Financial Administrators and their intended internal departmental staff (Business Analysts, Admins etc.), the Financial Manager has to add users to each of the Department IDs for which they have Grants associated to.

Addition of Department Contacts:

Department Contacts

SetID SHARE Department 410011 Description AN-Pediatric Anesthesiology

Department Contacts As Of [Search] | [Navigation] 1 of 1 | View All

\*Effective Date 06/01/2022 [Calendar] \*Status Active [Dropdown] [+ -]

**Search for the EmplID and add as Department Contact**

Contact Details [Search] | [Navigation] 1-3 of 3 | [View All]

\*Empl ID 113552 [Search] Taylor, Robyn Dena [+ -]  
Job Code 9228 [Search] MGR FINA.AFF  
\*Location CS02618 [Search] Sprague Clinical Science Bldg  
Email CAMP [Search]  
Robyn.Taylor@UTSOUTHWESTERN.EDU

**Approval Authority This section can be left blank**

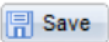
Unlimited Threshold Currency [Search]  
 Legally Bind Institution Threshold Amount [Text]

Phone [Search] | [Navigation] 1-1 of 1 | View All  
\*Type [Search] [Text] [+ -]

Official [Search] | [Navigation] 1-1 of 1 | View All  
Type [Dropdown] [+ -]

\*Empl ID 171627 [Search] Mills, Tamara Dee [+ -]  
Job Code 4362 [Search] MGR RESCH PRGMS  
\*Location HP03310C [Search] Professional Office Building 1  
Email CAMP [Search]

**Click the Add button to add more Department Contacts** → [+ -]

After all the Contacts are added, click  Save and exit.



From: PeopleSoft UTSouthwestern Sent: Thu 9/24/2015 7:02 AM  
To: Su Cole; Wendy Testerman; Wendy Testerman; Wendy Testerman; PeopleSoft UTSouthwestern  
Cc:  
Subject: Grant Notification Report - Award Activation - No Action Required

Message  UT\_GM\_SUBLED.pdf (33 KB)

Dear Research Community,

Your new SPA subledger has been set up and available for use! Attached please find the Grant Notification Report of Award Activation providing details related to your new award. Please refer to the highlighted portion of the report.

Please do not hesitate to call or email your respective Research Award Accountant if you have any questions or need assistance.

Thank you,  
Sponsored Programs Administration

**UTSouthwestern**  
Medical Center

### Grant Notification Report

**Notification Reason:** \*\*\* Please consider this document as an official notice of Award Activation, Subledger Creation and Budget Setup. \*\*\*

**Award Information:**

Award PI:	Ross,Elliott Morton
Award Title:	G Protein-Coupled Receptors-Structure and Regulation
Award ID:	OFA0006120
Ref. Award Number:	SR01GM030355-33
Sponsor Name:	NIH-NATIONAL INST OF GENERL MED SCIENCES
CFDA #:	93.859 - Biomedical Research and Resear
Project Start Date:	01/01/2012
Project End Date:	12/31/2015
Pay Method:	LOC
Award Status:	ACTIVE

From: PeopleSoft UTSouthwestern Sent: Thu 9/24/2015 7:01 AM  
 To: Su Cole; Wendy Testerman; PeopleSoft UTSouthwestern  
 Cc:  
 Subject: Grant Notification Report - Award Amendment - No Action Required

Message UT\_GM\_SUBLED.pdf (30 KB)

Dear Research Community,

Attached please find the Grant Notification Report of Award Amendment providing details related to changes which may have been made to your current award. Please refer to the highlighted portion of the report.

Please do not hesitate to call or email your respective Research Award Accountant if you have any questions or need assistance.

Thank you,  
 Sponsored Programs Administration



Grant Notification Report

**Notification Reason:** \*\*\* Please consider this document as an official notice of Award Amendment. \*\*\*

**Award Information:**

Award PI: Mangelsdorf,David John  
 Award Title: Development of Nuclear Receptors - Admin Core  
 Award ID: OPA0006709  
 Ref. Award Number: RP120732-AC  
 Sponsor Name: CANCER PREVENTION & RESEARCH INST OF TX  
 CFDA #: -  
 Project Start Date: 09/01/2012  
 Project End Date: 08/31/2017  
 Pay Method: CRB  
 Award Status: ACTIVE

**Amendments:**

Amendment	Type	Reason	Process Date	Status	Notes
000000000	Contract Activation		09/01/2012	Complete	
000000001	Change Date	Amendment	09/08/2013	Complete	Date Change
000000002	Sponsor	Add/In Time and Fund	09/08/2013	Complete	Setup your 2 pro-award per Cheryl Anderson e-mail dated 8-21-13
000000003	Change Date	Amendment	09/08/2014	Complete	Date Change
000000004	Sponsor	Add/In Time and Fund	09/08/2014	Complete	



**UTSouthwestern**  
Medical Center

Grant Notification Report

**Notification Reason:** \*\*\* Please consider this document as an official notice of Terms & Conditions change / Other Information. \*\*\*

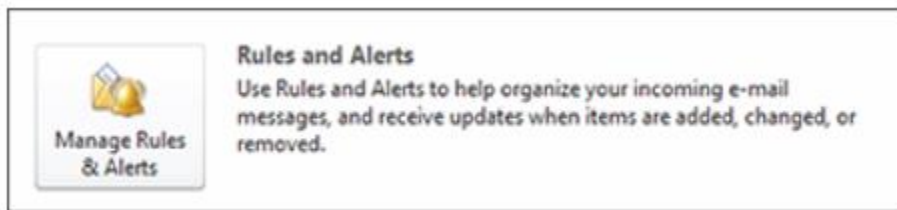
**Award Information:**

Award Pt: Goodman, Joel Mitchell  
 Award Title: The cell biology of lipid storage  
 Award ID: OPA0007434  
 Ref. Award Number: 7-13-BS-055  
 Sponsor Name: AMERICAN DIABETES ASSOCIATION  
 CFDA #: -  
 Project Start Date: 07/01/2013  
 Project End Date: 06/30/2016  
 Pay Method: SCH  
 Award Status: ACTIVE

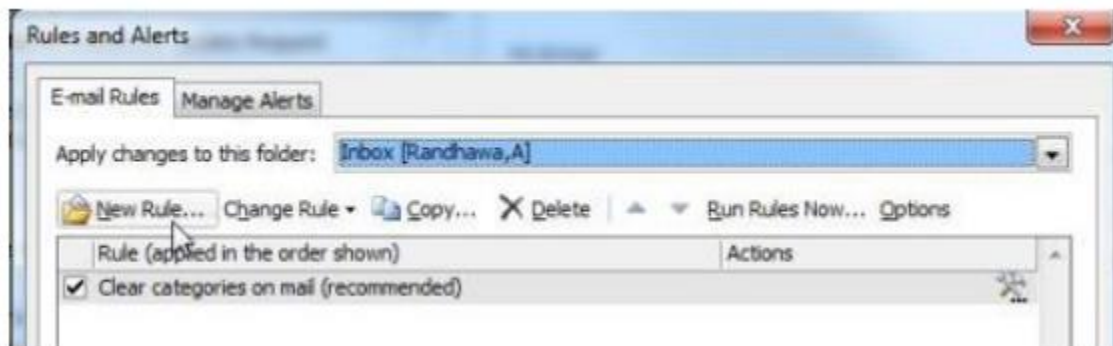
**Terms & Conditions:**

Term ID	Description	Explanation
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1. Click **File | Info** tab, and then the **Manage Rules & Alerts** button.



2. Click **New Rule...** on the **Email Rules** tab. *The Rules Wizard dialog will pop up*



3. In the area marked **Step 1: Select a template**, choose the template that most closely resembles the action you would like to take. Ensure you select a template from the **Stay Organized** or **Stay Up to Date** sections

Start from a template or from a blank rule  
Step 1: Select a template

**Stay Organized**

- Move messages from someone to a folder
- Move messages with specific words in the subject to a folder
- Move messages sent to a public group to a folder
- Flag messages from someone for follow-up
- Move Microsoft InfoPath forms of a specific type to a folder
- Move RSS items from a specific RSS Feed to a folder

**Stay Up to Date**

- Display mail from someone in the New Item Alert Window
- Play a sound when I get messages from someone
- Send an alert to my mobile device when I get messages from someone

**Start from a blank rule**

- Apply rule on messages I receive
- Apply rule on messages I send

Step 2: Edit the rule description (click an underlined value)

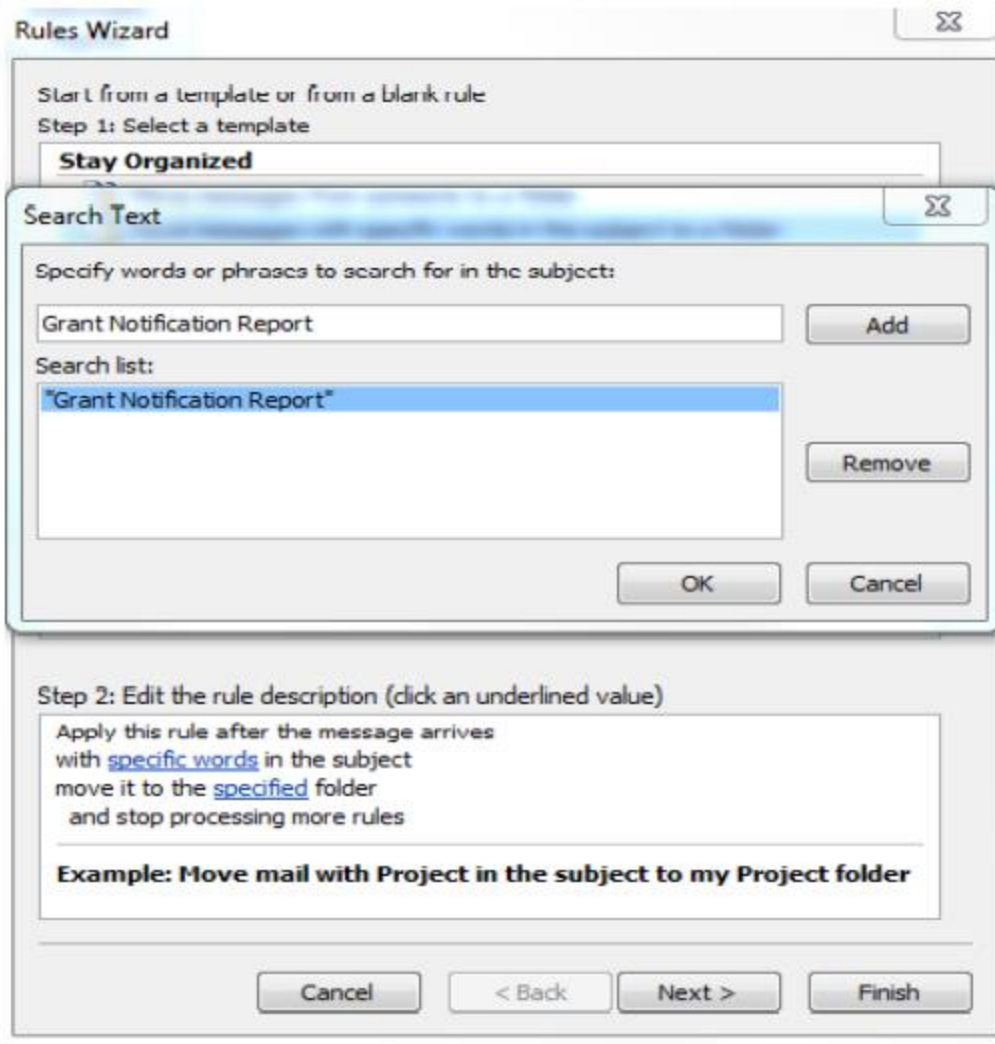
Apply this rule after the message arrives  
with specific words in the subject  
move it to the specified folder  
and stop processing more rules

**Example: Move mail with Project in the subject to my Project folder**

Cancel < Back Next > Finish

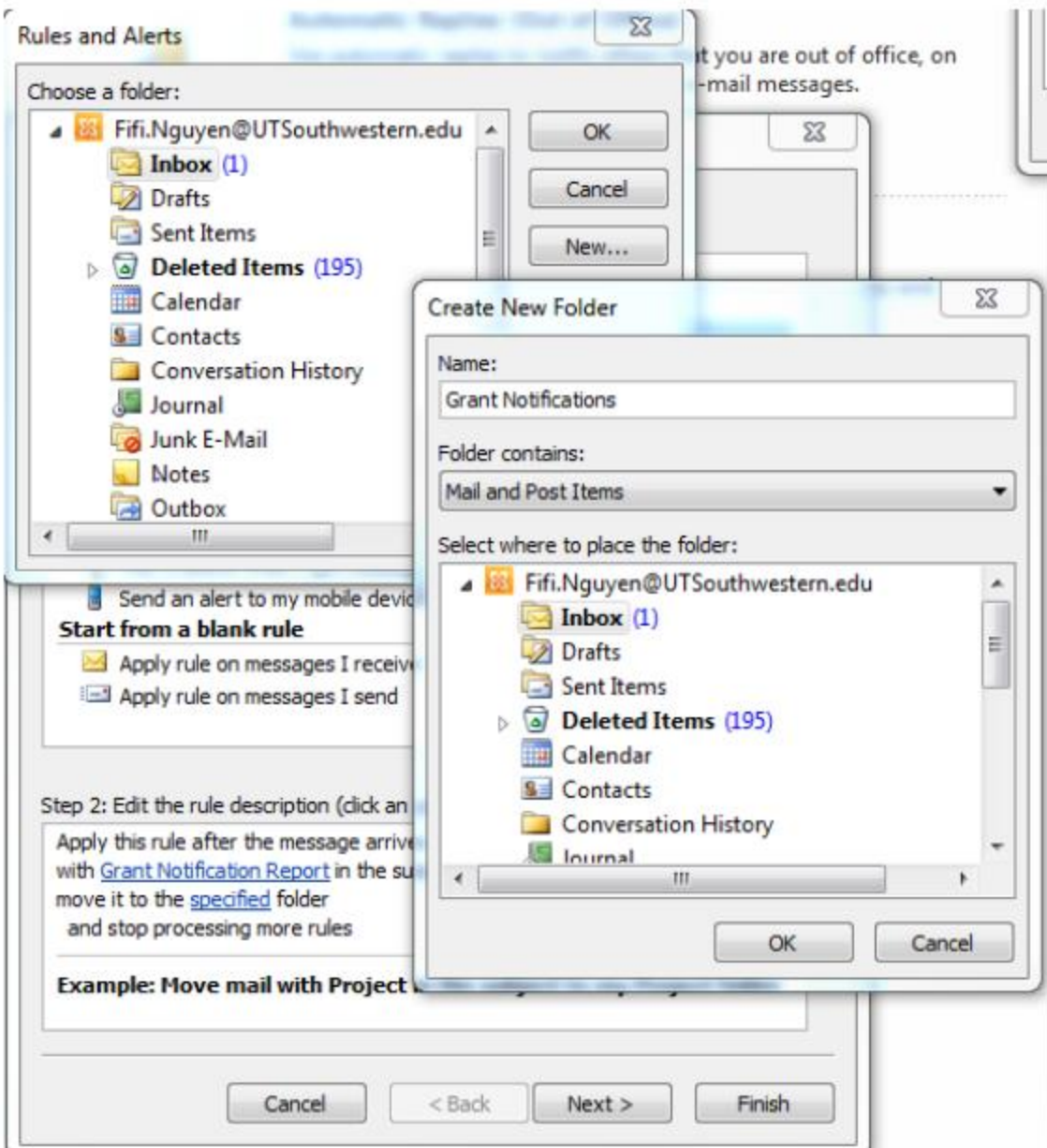
4. In the area marked Step 2: Edit the rule description, click on the underlined text specific words. A “Search Text” pop up will appear; type in “Grant Notification Report”. Then click the “Add” and “OK” button.





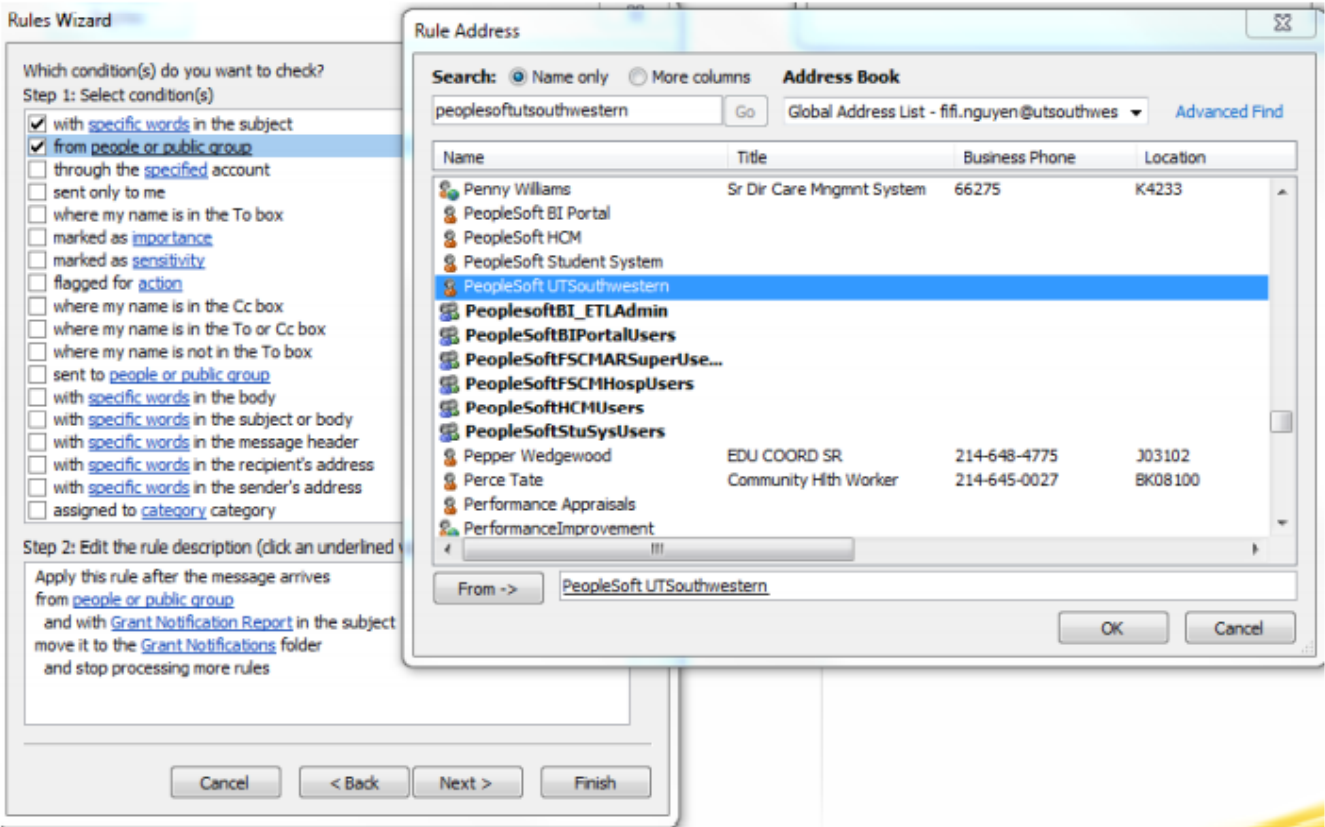
4. Select any additional criteria you would like to set Step 2: Edit the rule description by clicking on the specified folder and adding in your criteria. Click on Inbox then on the right-hand side, click on New... to create a new folder for the emails to go.



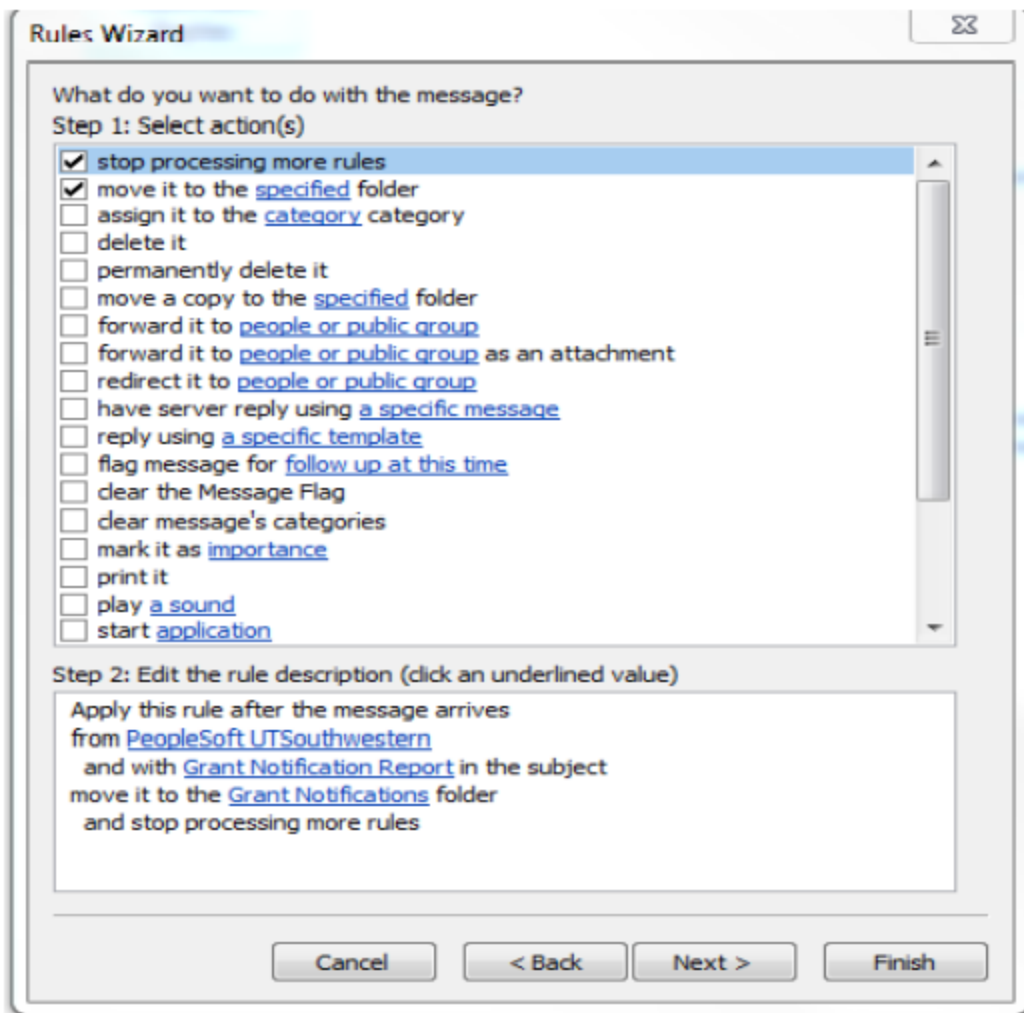


6. Click **OK**, and then click **NEXT**.

7. Specify the conditions for those criteria in the Step 2: Edit the rule description box by placing a tick mark from people or public group. Once ticked, this will include a line in Step 2: Edit the rule description box. Click on the people or public group and locate PeoplesoftUTSouthwestern in the Global Address Book. Click **OK**.

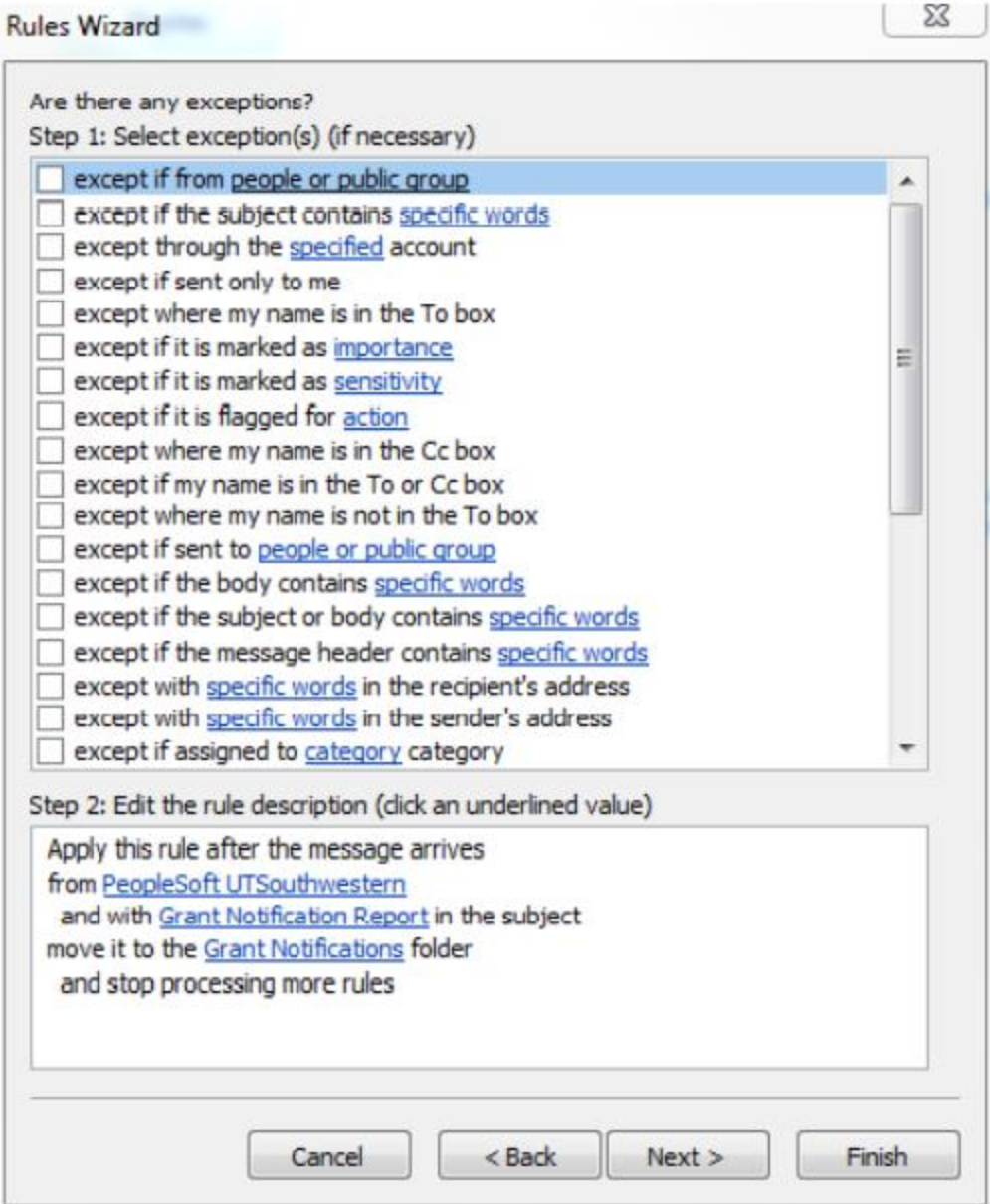


8. Click on Next



9. Click on Next

10. Select any exceptions to the rule and specify the details for those criteria in the Step 2: Edit the rule description box (optional)



13. Click on Next

14. Type a name for the rule in the box for Step 1: Specify a name for this rule

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

PeopleSoft UTSouthwestern

Step 2: Setup rule options

Run this rule now on messages already in "Inbox"

Turn on this rule

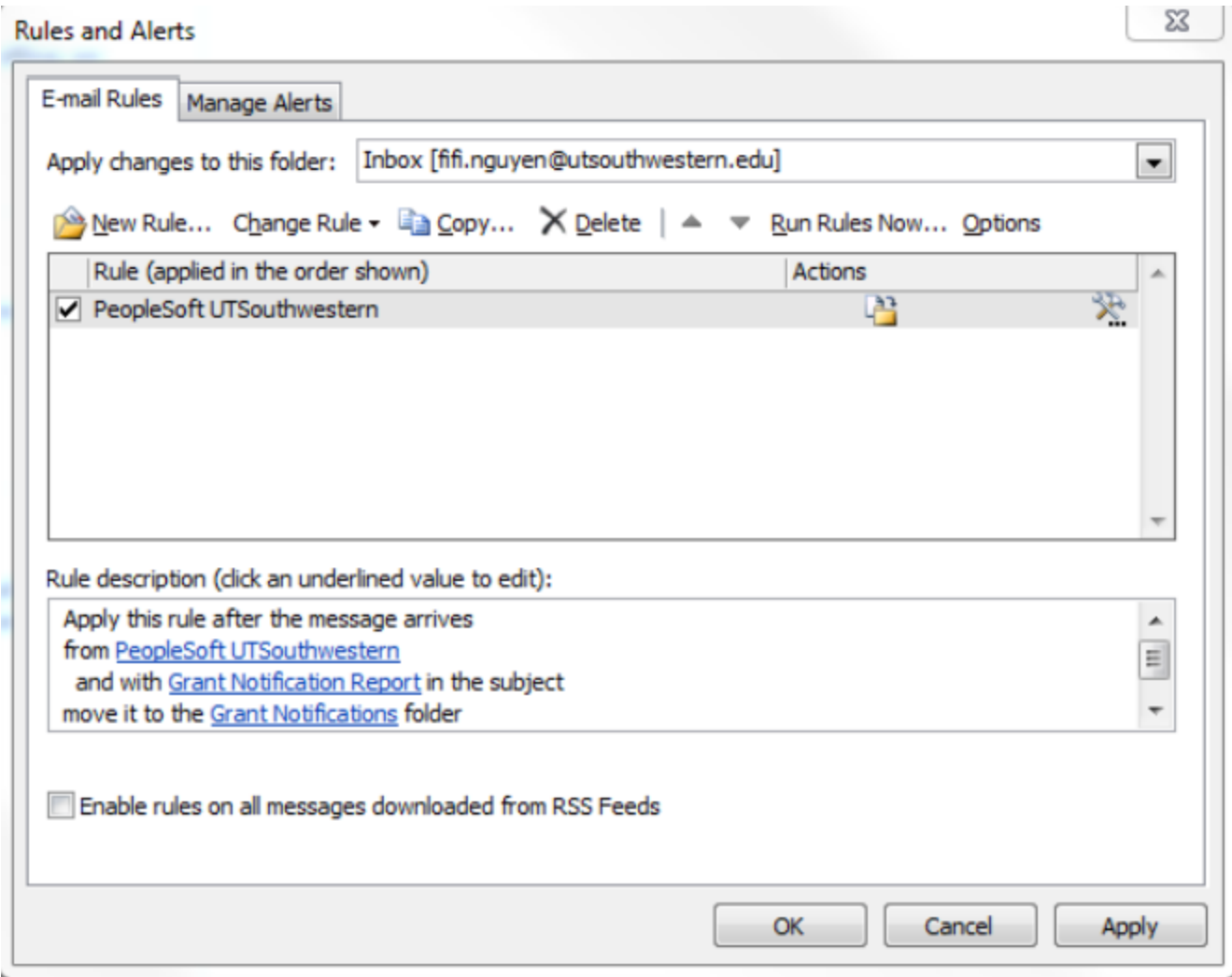
Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives  
from PeopleSoft UTSouthwestern  
and with Grant Notification Report in the subject  
move it to the Grant Notifications folder  
and stop processing more rules

Cancel < Back Next > Finish

15. Tick the box next to Run this rule now... if you want to apply the rule to messages already received
16. Review the settings you have selected in Step 3: Review rule description.
17. When you are certain of the details of the rule and want to commit to it, click Finish.
18. Your rule will now appear listed, with a description of the settings, in the Rules and Alerts dialog box



### Version Control

8-31-22:

- Updated screen shots and PeopleSoft naming conventions consistent with most recent PeopleSoft system updates.