AURA Grants Concurrence Checklist

End User: Proposal Creator (PC)

The following is the workflow and step-by-step reference guide to create and submit a Concurrence Request (CR). Concurrences are initiated when institution endorsement/approval is required for changes requested to a funded sponsored award. The Funding Proposal (FP) must be awarded and in an Active state for the button to appear. You may create multiple Concurrences, one per request.

Concurrence Workflow by States

Concurrence Workflow

- FP Active
- CR Draft
- CR Pending Sponsor Response (if necessary)
- CR PI Review
- CR URA Review
- CR UA Review (optional)
- Completed
1. Create Concurrence Request
   - Click Create Concurrence (FP workspace)
     o 1.0 – Confirm (check box) you would like to create the CR
     o 2.0 – Title defaults and #’s automatically – no action required
     o 3.0 – Select Yes/No to notify key personnel of CR’s creation
   - Click Continue
   - Enter all applicable information/documentation in the CR
     o Click Finish on the final view

2. Click Forward to PI for review (CR workspace)
   - Confirm (check box) the CR is ready to forward.
   - Click OK

3. PI (or PID) clicks PI Concurrence
   - 1.0 – Confirm (check box) PI Concurrence.
   - Click OK

4. Click Forward CR for Review
   - 1.0 – Confirm (check box) the CR is ready to forward.
   - 2.0 – Select/Add any Unit Approvers (optional*).
     o *If no UA is selected the CR will move directly to CR URA Review
   - Click OK

5. Unit Review (optional)
   - Request changes
     o UA clicks CR Request Changes
   - Approve
     o UA clicks CR Unit Approval

6. URA Review
   - Request changes
     o URA-M clicks CR Request Changes
   - Approve
     o URA-M clicks CR URA Approval
       ▪ If the CR requires agency approval... the state will move to CR Pending Sponsor Response.
       ▪ If not, the CR will move to Completed.