21.0 Agency/Sponsor Deliverables ................................................................................................................................................................. 25
22.0 CR Complete............................................................................................................................................................................................ 26
Concurrence Request Completion ............................................................................................................................................................................... 27
Concurrence Request Workspace........................................................................................................................................................................... 28
Concurrence Completion ..................................................................................................................................................................................... 30
Update your FAS #s when appropriate

If your personnel were not determined at the time of proposal, update your list of people – you can also add read-only rights here.
Update any departmental documentation that was not needed for submission or other internal forms for record keeping.

If you have compliance pending with your proposal, you can updated and upload any protocol details as needed.
Just-in-Time Workflow

- Go to your AURA Workspace
  - Open the JIT Sponsor Request Received
  - Current State must be in Pending Sponsor Response

If a JIT Request has been received, you can start it in “My Activities”
Just-in-Time Workflow

- Enter your JIT information in your popup and/or Funding Proposal view 20.0
  - If you have questions about what documents need to be submitted, discuss with your URA Manager
  - Save and Exit once your JIT information is up-to-date

Update the information the sponsoring agency is asking for.

Popup will open (see below): Upload your pdf File of what the agency is looking for. Insert a Type of document and any comments needed.

Select the responsible party for submission of the JIT - if unsure contact your URA Manager

Identify how you will be submitting the JIT – any option besides eRA Commons needs to include contact information in 20.6
Just-in-Time Workflow

- **Go back to your AURA Workspace**
  - Once you have updated your JIT information, forward it to URA for review
    - After the PI has approved the JIT

Once you have uploaded your JIT document and notes, an activity to **Forward** your JIT for review – click this to have your URA Manager review

Make sure your PI has completed the PI Concurrence activity
Just-in-Time Workflow

- **Go to your AURA Workspace**
  - After URA approval you will see a note in the History
  - Your proposal will go back to Pending Sponsor Response – another JIT is now possible

---

Once your JIT has been confirmed and submitted by URA, you will see a note in the History

If you were asked to make changes by URA, you will have an activity in 'My Activities' to – you will see notes in your History showing any activity.
Post-Submission Workflow

- **Go to your AURA Workspace**
  - After the FP has been awarded – URA will update the history and amounts updated

The awarding of the Funding Proposal is done through URA

You will find the awarding history in your AURA workspace
Initiating a Concurrence Request

- Go to your AURA Workspace
  - Open Create a Concurrence in your left sidebar

Click the Create Concurrence button. The order or buttons could be different depending on the Current State of the FP.
Initiating a Concurrence Request

- Enter all information to start Concurrence Workflow

Confirm you would like to actually create a Concurrence with a tic

Title your Request - it defaults with a CR 01 at the end of your current FR title
1.0 General Information

- **After Concurrence creation the workflow starts with view 1.0**
  - Create a title if you would like to change the name of the Concurrence
    - A Concurrence shows up separately in your AURA workspace (child to the main parent FP)
  - Different requests in 1.02 bring up different views for the workflow (Post-award will receive a notification also)

Enter basic information about your request

Be aware of how many options 1.02 has in the dropdown menu. (All will be covered later)

Be sure to select the correct person(s) – this person will have viewing rights to the concurrence request
2.0 Concurrence Request Proposal Attachments

- **Upload Concurrence Request Proposal Attachments**
  - Click **Add** to get the popup to upload your PDF and give details of the documents
  - This is not the CR form currently used, it is the data going to the agency – URA Reviews

Attach the documents needed for URA to review the Concurrence request – upload in a PDF format

In popup enter all information you can about the documents you are uploading – including a description of the document(s)
2.0a PI Detail

- Branching view: Change in PI, Fellow or Mentor
  - Chose your PI from the popup window – see help-text for more information

Click Select to bring up a chooser list of PI eligible personnel
Search for the PI just as was done in the Funding Proposal
Questions 2.2a and 2.3 are also required for URA review
This is a follow up view to check the PI/Fellow information in 2.0a

This information will map from the Personnel Profile — any changes made here should be made in the profile
### 3.0 No-Cost Extension Requests

**Branching view: No-Cost Extension**
- Enter your Request Number and length you are requesting for the extension
- If there is a change in the effort – the Personnel Grid in the budget needs to be updated
- Be aware of the Cost Share policy if there are not funds to cover the extension

---

**CR 3.0 No-Cost Extension Requests**

- **CR 3.01 No-Cost Extension Request Number:**
  - 1st Extension Request
  - 2nd Extension Request
  - 3rd Extension Request
  - 4th Extension Request
  - Clear

- **CR 3.02 Length of No-Cost Extension Request in months:**
  - [ ]

- **CR 3.03 Will the PI or other Key Personnel Effort Change as a result of the No-Cost Extension?**
  - [ ] Yes
  - [ ] No
  - Clear

- **CR 3.04 If "Yes" selected in previous question, please describe the changes. Note, the budget will be updated after the Concurrence Request is approved:**

- **CR 3.05 Will the change in effort of the PI be greater than 25%? If yes, please attach the letter of request to the agency in Question CR 2.1 [Proposal Attachments].**
  - [ ] Yes
  - [ ] No
  - Clear

- **CR 3.06 Are there available funds to cover the No-Cost Extension period?**
  - [ ] Yes
  - [ ] No
  - Clear

- **CR 3.07 If "No" selected in previous question, please provide a Cost Share memo in View 10.0 Internal Documents.**

- **CR 3.08 General Comments:**

---

Enter which request number and how many months you are requesting the extension

Choose if effort changes with the change in the no-cost extension – If Yes, changes to the **Budget Personnel Grid** need to be made after the NCE is approved

If you chose No, this will lead to cost sharing for the proposal

Check the FOA or with your URA manager for questions on Cost Sharing
4.0 Budget Update

- Branching view: No-Cost Extension, Request to Add/Change Subaward, Change in PI, Change in Key Personnel, Change in Effort, Request to Reallocate Funds, Request to Relinquish an Award, Fellowship Activation or Termination Notice
  - Visit your budget after your request is complete

The Budget Update view will show when a change in the budget is required

Updates to the budget must occur on the Budget Grids – once the concurrence request is complete proceed to the Cumulative Budget tab in your AURA workspace
8.0 Project Personnel

- **Branching View: Change in Key Personnel**
  - Add personnel as needed
    - Views will be the same as in the original funding proposal

If you need to add a person to the grant, click the add button and add an individual – just as you did in the initial funding proposal.
9.0 UChicago Project Information

- This view will show for ALL requests
  - If you do not have any changes here, Continue without making any changes

9.1 – 9.9 are required UChicago Project questions (default at previous FP selections)

Any major update to the operations can be changed within these questions – many of which are branching question and will have follow up views later in the Concurrence Request
10.0 Compliance

Branching View: Request to lift a Protocol Restriction,

- Update any protocols for the proposal

Update or add any Compliance that has changed for your Grant. Any required question with Yes selected, Add any protocol details to the appropriate protocol selection.
11.0 Subaward - Outgoing

- **Branching view: Request to Add/Change Subawardee**
  - Click Add to update the Subawardee organization
    - Within the popup window select the **Site Organization** from a followup popup
  - Subawardee Contact Information is required as a PI from the Subaward organization must be selected
    - Under **Add** you are able to add this information with free-form text boxes

**To add a Subaward click the Add button and your popup will appear**

**Enter Site Organization and the Subaward Contact Information**

**11.1.2 is required as you must enter a PI under the Add option**
12.0 Performance Sites

Branching view: Request to Add/Change Subawardee

<table>
<thead>
<tr>
<th>12.0 Performance Sites</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project/Performance Site Primary Location:</strong></td>
</tr>
<tr>
<td><strong>Organization Name:</strong> The University of Chicago</td>
</tr>
<tr>
<td><strong>DUNS Number:</strong> 002411736</td>
</tr>
<tr>
<td><strong>Project/Performance Site Congressional District:</strong> IL-07</td>
</tr>
<tr>
<td><strong>Street 1:</strong> 5801 S Maryland</td>
</tr>
<tr>
<td><strong>Street 2:</strong> 4935 N Lake</td>
</tr>
<tr>
<td><strong>City:</strong> Chicago</td>
</tr>
<tr>
<td><strong>County:</strong> Cook</td>
</tr>
<tr>
<td><strong>State:</strong> IL</td>
</tr>
<tr>
<td><strong>Province:</strong></td>
</tr>
<tr>
<td><strong>Country:</strong> USA</td>
</tr>
<tr>
<td><strong>Zip/Postal Code:</strong> 60637-5418</td>
</tr>
</tbody>
</table>

12.12 Identify Project Performance Site Location(s) 1-20:

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>DUNS Number</th>
<th>Street 1</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are no items to display
13.0 Clinical Trials

- **Branching View: Changes to Clinical Trial**
  - Update any information from a Clinical Trial
    - All questions are from the initial Funding Proposal view 13.0

Add changes in the Clinical Trials aspect to a grant

This view is the same view as you will see within the Funding Proposal workspace view 13.0 (the page expands down to 13.20)
18.0 Internal Documents

- Branching View: No-Cost Extension, Change in PI, Change in Personnel, Change in Effort, Revised Scope of Work, Request to Lift a Restriction on Protocols, Changes to Clinical Trail
  - Add any documentation for URA review about cross department collaboration

If there has been a change in collaboration, add any information needed in this view
21.0 Agency/Sponsor Deliverables

- Branching View: Request to Relinquish an Award
  - This view will show up as needed – but is not required from the department

This view will be updated by URA as needed
22.0 CR Complete

Final View for Concurrence Request

Once you have completed your Concurrence Request, hit Finish and URA will review your request.
Concurrence Request Completion

- **Final View for Concurrence Request**
  - Once request is complete the PI (or PID) must login to approve this request
  - The concurrence and original funding proposal can be linked back to from your Concurrence Workspace

Concurrence is created as a child to the parent funding proposal – to move back click the first breadcrumb link

The title of your funding proposal also adds a “CR” as the Concurrence has been created as a Child

When the PI or PID logs in, the PI Concurrence activity will show under “My Activities”

To view the original funding proposal from the Concurrence workspace – Click the link under History
Concurrence Request Workspace

- Final View for Concurrence Request
  - Forward the CR for Review to URA

Once PI Concurrence is completed – the CR must be forwarded to URA for review
Concurrence Request Workspace

- **Final View for Concurrence Request**
  - URA will review the request
Concurrence Completion

- URA reviews the Concurrence Request made
  - Once URA approves the status of your Grant will update

URA Approval shows in history and changes the Current State of the Grant
Concurrence Completion

Location of Concurrence within main AURA workspace

Within the AURA workspace the Concurrence Requests are accessible within the Concurrence Request tab.

Concurrence can always be created from the primary (PR) FP AURA workspace.

When the breadcrumb is clicked back to the Funding Proposal OR a direct login to AURA – the Concurrence Request will be found within the tabs.