

New Academy Company – Awards and Grants Conversion Guide

Purpose of this Guide

This guide provides a detailed overview of the Awards and Grants conversion effort and corresponding user impacts as part of the New Academy Company structure launching on June 1.

This guide is intended for the Office of Research Administration (ORA) and Grant Administrators.

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- How should I **run reports** differently? **(coming soon!)**



Important! Award & Grant Setup, Amendments, and Corrections will be paused **Friday 5/23 at 5p EST - June 1 at 8a EST.**

Which Grants and Awards are Converted?

Converted Award population includes all awards that meet the following conditions:

1. Award Header = 200, and
 2. Award Lifecycle Status = Active, On Hold, Advance Set Up, Pending Close Out, Closed, Conversion Closeout, or Blank
- All Award Lines & Grants associated to these Awards will be converted, ***except for those with Award Line Status of Cancelled***
 - **The New Company (or Company 500) will be assigned to the Award Header and Award Lines** based on the cost center associated with the Award and Award Lines
 - Conversion population includes the [previously converted MSOM Awards](#) where Award Header Company was kept as Company 200.
 - A new Award (appended with “-3”) with the Header Company 500 will be created.
 - Existing “-1” Grants on these Awards will convert to “-4” Grants.
 - Note that any ***Awards that currently have an Award Header Company 500*** (e.g., created new *after* the MSOM Conversion) will not be impacted by this project.

Award & Grants Worktag Conversion

New Academy Grant Worktags **and Awards** will be created to move to the respective companies. **Use the new Worktags starting June 1 when entering transactions for FY26.**

Worktag Type	New Grant ID Convention	Old Grant Worktag	New Grant Worktag as of June 1
Grant Worktag moving to New Academy Company	Old Grant # Appended with "-3"	GR024773	GR024773-3
Grant Worktag in MSoM previously converted	Old Grant # Appended with "-4"	GR018500-1	GR018500-4
Award Numbers associated with Impacted Grants	Old Award # Appended with "-3"	AWD-00704	AWD-00704-3

After June 1:

- Use the New Grant Worktags and Academy Companies for FY26 transactions (i.e., an accounting date after May 31, 2025).
- Only use the Old Grant Worktags and Company 200 for remaining FY25 transactions (i.e., an accounting date before June 1, 2025).
- The Old Grant Worktags will be inactivated after FY25 closes to prevent usage on transactions.

Award & Grants Worktag Conversion: Examples

Example Award structures and corresponding conversion approach.

Award Structure	Existing (Old) Award & Grant	New Award & Grant as of June 1
Academy: <ul style="list-style-type: none">Award Header: Company 200Award Line & Grant: Company 200	CC00047 Biology AWD-009695: Award Company 200 GR024473: Award Line Company 200	CC00047 Biology AWD-009695-3: Award Company 250 GR024473-3: Award Line Company 250
Previous MSOM Conversion: <ul style="list-style-type: none">Award Header: Company 200Award Line & Grant: Company 200 and 500	CC00641 Pharmacology AWD-007004: Award Company 200 GR018500 (Inactive): Award Line Company 200 GR018500-1: Award Line Company 500 GR022614: Award Line Company 500	CC00641 Pharmacology AWD-007004-3: Company 500 GR018500-3 (Inactive): Award Line Company 500 GR018500-4: Award Line Company 500 GR022614-3: Award Line Company 500
MSOM: <ul style="list-style-type: none">Award Header: Company 500Award Line & Grant: Company 500	CC00640 MSOM Microbiology AWD-009872: Award Company 500 GR024989: Award Line Company 500	<i>Not converted – no changes to the existing Award and Grant.</i>

The existing (Old) Award and Grants will be inactivated after FY25 close to prevent usage on transactions

Company mapping for New Awards and Grants

- New Awards will be mapped based on the *existing* Organizations for Award Cost Center.
- New Award Lines will be mapped based on the *existing* Cost Center associated with the Grant (see CC > Company mapping)

Grants and Awards Conversion Data

Attributes and balances will be converted to *New* Grants and Awards within the conversion population

Available June 1st

- ✓ **Awards (with “-3”) and award attributes** including award schedule, award roles, billing schedule(s), subaward, and award budget
 - Award budget converted at Grant/Award line level
 - Note: Award Tasks will be converted post June 1
- ✓ **Grants (with “-3” or “-4”)** including related Worktags, grant-assigned roles and grant hierarchies
- ✗ **Award attachments** will not be converted and remain on the *Old* Award.
 - Navigate via the Related Award field on the *New* Award.

Available after FY25 Close (Mid June)

- ✓ **LTD balances and transaction summary**
 - **Summarized transactions** rolled up by Spend Category, Object Class, Cost Center, Fund, and Financial Class, Fund will be converted to the new Grants to represent LTD spend
 - Conversion entries will use a “New Company LTD Conversion” journal source
 - **FY26 beginning balance sheet values** at the Grant and Fund level will be converted to enable an updated trial balance
- ✓ **Billing history (billed and unbilled expense)** allowing ORA to continue invoicing and processing LOC Draws from the New Awards accurately
- ✗ **LTD transaction detail** including line-by-line expenses with drillable details (i.e., direct link to expense report) will not be converted and remain on the *Old Award/Grant*.
 - Reporting from the *old Award / Grant* will be required for those details for FY25 and prior.

Subaward Contract Conversion

A new Supplier Contract for Subawards (SPC) will be created in the corresponding company if they meet the following criteria:

1. Supplier Contracts associated with the [award conversion population](#), **and**
2. Status = active, approved, amendment in process, or approval in process, **and**
3. Balance remaining as of May 31, 2025 <> \$0

A new SPC number will be created for the converted Supplier Contracts. Note: the *new* Supplier Contract Name will include the old ID # (e.g., 01234 Tagur SPC00001). That way, if you search for the old SPC #, the new SPC will appear.

- The new Supplier Contracts will be created after FY25 close (mid-June).
 - The *old* Supplier Contacts will be inactivated shortly after.
- ***Total Contract amount*** established on the new SPC will be the remaining balance on the old SPC
- ***Basis limits*** will be re-established on converted SPC's with the remaining balance (**see next slide**)
- ***Subrecipients do not need communication about the new SPC numbers.*** AP will apply payment against the new SPC, even if payment comes with the old number.
- The old Supplier Contract will be inactivated after Accounts Payable closes for FY25 (mid-June)
- Note: to view ***historical attachments***, navigate back to the legacy SPC. New attachments after June 1 will be added to the new SPC.

Subaward Basis Limit Calculations

Subaward Basis Limits will be re-established for the balance eligible for assessment of indirect costs

Scenario
Conversion Approach

One Award Line & Grant	Multiple Award Line & Grant	One or Multiple Line Award
Remaining balance to be assessed indirect costs as of June 1.	Remaining balance to be assessed indirect costs as of June 1	0\$ remaining balance to be assessed indirect costs as of June 1
<ul style="list-style-type: none"> Converted Award Line created with a basis limit equal to balance to be assessed with indirect costs. 	<ul style="list-style-type: none"> Current year converted Award Line created with a basis limit equal to balance to be assessed with indirect costs. Prior year(s) converted Award Line created with a 0 Rate Agreement to prevent indirect cost charges on adjustments to prior years. <ul style="list-style-type: none"> <i>In exception cases, manual adjustments required to assess indirect costs</i> 	<ul style="list-style-type: none"> Converted Award Line(s) created with a 0 Rate Agreement to prevent indirect cost charges on adjustments to prior years. <ul style="list-style-type: none"> <i>In exception cases, manual adjustments required to assess indirect costs</i>

Grant and Award Visibility

- **Security will be additive** so that users maintain access to legacy values and companies, in addition to the new Academy Companies
- **Grant and Award Roles** will be converted to the converted Awards and Grants

Key Dates for Changes



Grant & Award Setup, Amendments and Corrections will be paused **Friday 5/23 at 5p EST through June 1 at 8a EST.**

