

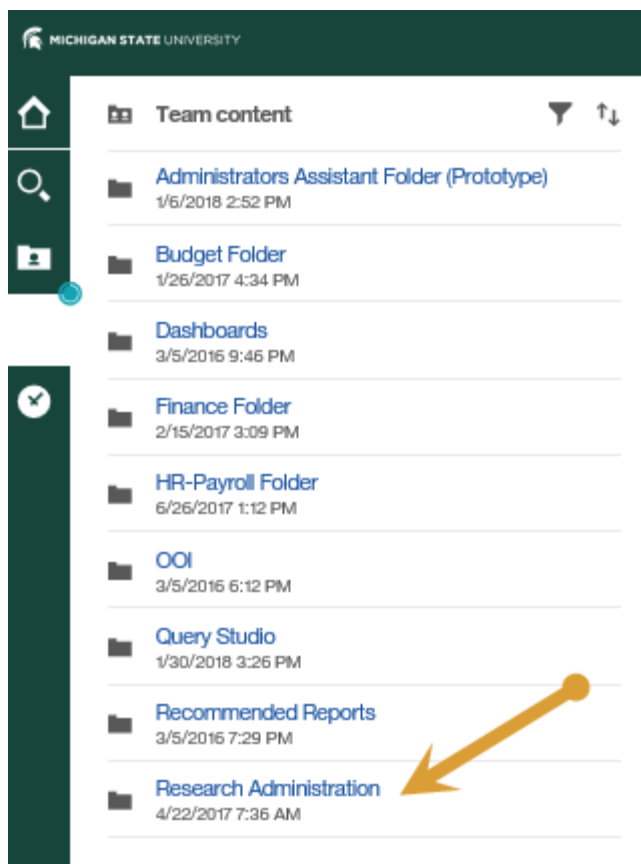
## JOB AID

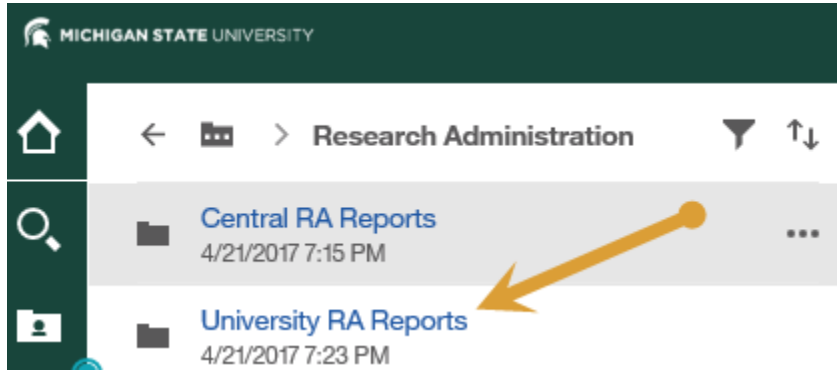
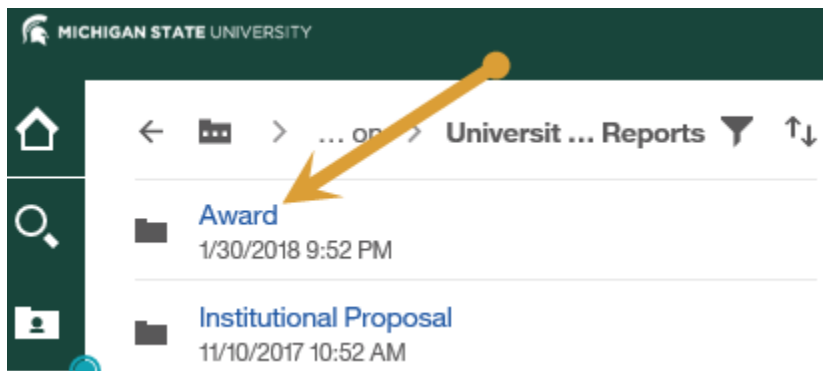
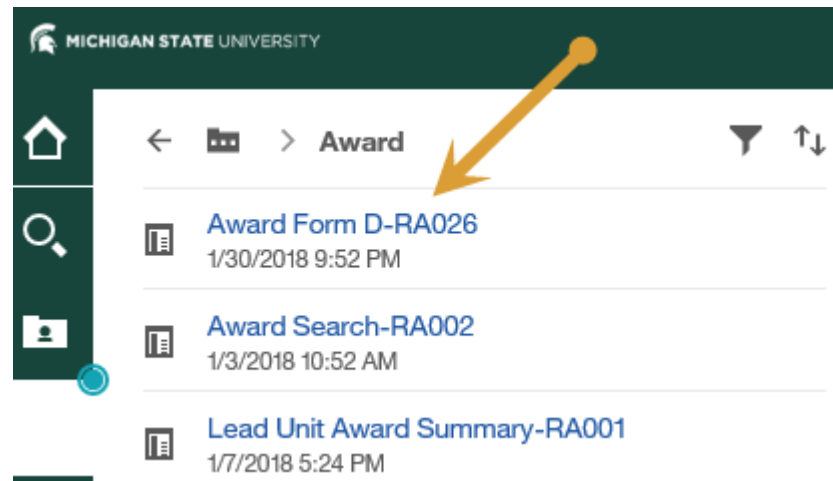
### Award Search (Form D)

This job aid outlines the steps necessary to obtain a listing of a Principal Investigator's awarded projects. They can be searched by Finalized Date Range and Sponsor Type (External/Internal). Please note the results and the data associated will be for the date range searched.

#### HOW:

1. Visit and log into <https://bi.itservices.msu.edu/>
2. Select **Research Administration**.



3. Select **University RA Reports**.4. Select **Award**.5. Select **Award Form-D-RA026**.

## 6. Complete the following report prompts:

- a. Enter a **Date Range** based on the **Award Finalized Date**.
- b. Select a **Sponsor Type** (either External or Internal). Note that Internal awards will display if the Unit running the internal competition required the Institutional Proposal to be routed in the KC Research Administration system. At this time, there are not very many records in the system.
- c. Select a **Form Type** (either Official or Detailed- see below for a description of the added fields in the detailed report).
- d. Enter a **Principal Investigator** name in the Keywords field and click **Search**. Select the **Principal Investigator's** name from the search results in the Choice field.

7. Select **Finish** to run the report.

The screenshot shows the Michigan State University Award Search Form D interface. The page title is 'Award Search Form D'. The interface includes a date range selector for 'Select Award Finalized Date Range:' with 'From:' set to 'Jan 1, 2013' and 'To:' set to 'Dec 31, 2017'. Below this are three main sections:

- Select Sponsor Type:** Radio buttons for 'External Sponsors' (selected) and 'Internal Sponsors'.
- Select Principal Investigator:** A search box with 'smith' entered and a 'Search' button. Below the search box is a list of 'Choice:' options, with 'Smith, Danielle (smit2208)' selected.
- Select Form Type\*:** Radio buttons for 'Form D Official' (selected) and 'Form D Detailed'.

A note below the search section states: '\* Form D Detailed will include Sponsor Types, Board Date, Account Number and numerous other fields.' At the bottom, there are 'Cancel' and 'Finish' buttons. A yellow arrow points to the 'Finish' button.

Search and Select prompts only return 200 values, use options to refine search results. Reference reports are available within university wide folders.

## FIELD NAMES AND DESCRIPTIONS:

**Award Form D Official** will return the following information grouped by Award Title in alphabetical order based on the **date** range searched:

1. Project Role Description (*Principal Investigator, Co-Investigator, Key Person*)
2. Additional Investigators (*Names and Roles*)
3. PI Unit (*Department that is receiving F&A credit- there may be more than one*)
4. Parent/Child (*Identifies account as Parent or Child*)
5. Award Status (*Active/Closed/Etc.*)
6. Activity Type (*Research/Education/Instruction/Fellowship/Etc.*)
7. Sponsor (*Grantor*)
8. Prime Sponsor (*Name of entity where funding originated*)
9. Project Start Date (*Identified project start date*)
10. Project End Date (*Identified project close date*)
11. Award Amount Total (*Total award amount attributed to the Principal Investigator and for the date range searched*)
12. Amount Obligated to Date (*Full amount of award as of the end of the date range searched*)
13. Principal Investigator's (PI) Credit (Crd) Split (*F&A credit attributed to that PI*)
14. Principal Investigator's (PI) Unit Credit (Crd) Split (*F&A credit assigned to that Dept for that PI*)

15. Principal Investigator's (PI) Unit Credit Award Amount (*Award Amount Total\*PI Credit Split\*PI Unit Credit Split*)
16. Principal Investigator's (PI) Unit Credit Anticipated Amount (*Anticipated Amount (Per date range selected)\*PI Credit Split\*PI Unit Credit Split*)
17. Anticipated Total Amount (*Total amount we expect to receive from the Sponsor for date range selected*)
18. F&A Percent (*F&A Percentage being charged on Award*)
19. Institutional Proposal Number (*official proposal number*)

**Award Form D Detailed\*** returns:

1. Project Role Description (*Principal Investigator, Co-Investigator, Key Person*)
2. Additional Investigators (*Names and Roles*)
3. PI Unit (*Department that is receiving F&A credit- there may be more than one*)
4. Award ID\* (*Award number assigned in the Award Module*)
5. Parent/Child (*Identifies account as Parent or Child*)
6. Account ID (*KFS Account Number*)
7. Award Status (*Active/Closed/Etc.*)
8. Activity Type (*Research/Education/Instruction/Fellowship/Etc.*)
9. Sponsor (*Grantor*)
10. Sponsor Type\* (*Foundation/Federal Government/Other/Etc.*)
11. Prime Sponsor (*Name of entity where funding originated*)
12. Prime Sponsor Type\* (*Foundation/Federal Government/Other/Etc.*)
13. Sponsor Award ID\* (*Agreement number assigned by the Sponsor*)
14. Finalized Date\* (*Date the Award Transaction was entered into KC*)
15. Board Acceptance Date\* (*Date the Award transaction was sent to Board of Trustees for approval*)
16. Project Start Date (*Identified project start date*)
17. Project End Date (*Identified project close date*)
20. Award Amount Total (*Award transaction attributed to the Principal Investigator and for the date range searched*)
18. Amount Obligated to Date (*Full amount of award as of the end of the date range searched*)
19. Principal Investigator's (PI) Credit Split (*F&A credit attributed to that PI*)
20. Principal Investigator's (PI) Unit Credit Split (*F&A credit assigned to that Dept for that PI*)
21. Principal Investigator's (PI) Unit Credit Award Amount (*Award Amount Total\*PI Credit Split\*PI Unit Credit Split*)
22. Principal Investigator's (PI) Unit Credit Anticipated Amount (*Anticipated Amount (Per time period selected)\*PI Credit Split\*PI Unit Credit Split*)
23. Anticipated Total Amount (*Total amount we expect to receive from the Sponsor for time period selected*)
24. CFDA Number\* (*Catalog of Federal Domestic Assistance Number*)
25. F&A Percent (*Facilities & Administration Percentage being charged on Award*)
26. Organization Document Number (*application number from legacy system, if applicable*)
27. Lead Organization Indicated (Y/N)\* (*Indicates whether the Unit Org Code displayed is the Lead Unit*)
28. Special Review Description\* (*Text that provides what compliance items are associated with the project (Human Subjects/Animal Use/Export Control/Etc.)*)
29. Institutional Proposal Number (*official proposal number*)