

Start-Up Guide: Network Manager

Pre-Award:

*Complete one month prior to award state date

- Create Folders on L Drive – Awardee Info, Reports, RFA, etc.
- Award Metrics Excel Sheet (Use template, update once awarded)
- Roster Publisher Sheet (Use template, update once awarded)
- Set-up Payment General Ledger Account (Payments > Pay from Account Set Up)
 - Select Program then add GL number to Account Number and Account # sections while still in pre-award.

- Budget Set Up (Options>Budget Set Up)
 - Review Budget Set Up from Another Program if applicable

- Validations – check box for % indirect cost and 10% in both text boxes

- ****New** – check box for Personnel Cost Effort Required for Submission.

Personnel Cost Effort Required for Submission

● **Options under Budget:**

Options >

Enter instructions for the grantee that will appear at the top of their Budget Section.

Please report grant expenditures for the authorized award period. Award expenses must be directly related to the approved research project.

2,000 Maximum Character Count

Allow grantees to add new items: No

If "Yes", grantees will be able to add line items to budgets with details and categories to summary only budgets. If they can also delete, grantees will be able to delete any line items that were added during post-award.

How many signatures do you want to collect? 2 Signatures

Lock Budget when a signature is Saved

● **Text for Instructions:** *Please report grant expenditures for the authorized award period. Award expenses must be directly related to the approved research project.*

Electronic Signature: Required

If the Electronic Signature is Required or Optional, you must select the type of signature and you have the option to enter instructions that will be displayed beneath the signature.

Type: Type Name

Optional Instructions:

I hereby certify that this report is true and correct to the best of my knowledge and that all expenditures and obligations reported herein have been made in accordance with the appropriate AHA grant policies and for the purposes set for the in the application and the Award Agreement.

500 Maximum Character Count

Assign Signature Access only to If using Budget Deliverable, see help text. Award Contacts - All Administrator and Edit +

PI 🗑️

Signature 2 >

Electronic Signature: Required

If the Electronic Signature is Required or Optional, you must select the type of signature and you have the option to enter instructions that will be displayed beneath the signature.

Type: Type Name

Optional Instructions:

I hereby certify that this report is true and correct to the best of my knowledge and that all expenditures and obligations reported herein have been made in accordance with the appropriate AHA grant policies and for the purposes set for the in the application and the Award Agreement.

500 Maximum Character Count

Assign Signature Access only to If using Budget Deliverable, see help text. Award Contacts - All Administrator and Edit +

Institution Contact:*Fiscal Officer 🗑️

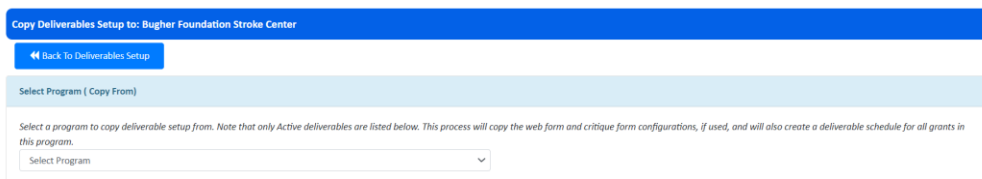
Require at least one signature for this role. If unchecked, all users with this role will be required to sign.

Text for Instructions for 2 signatures (PI and FO): I hereby certify that this report is true and correct to the best of my knowledge and that all expenditures and obligations reported herein have been made in accordance with the appropriate AHA grant policies and for the purposes set for the in the application and the Award Agreement.

- Deliverable Set Up (Options>Deliverable Set Up)
 - Make sure all needed deliverables are selected and updated Award Agreement
 - Copy Deliverables Set Up from Another Program if applicable
 - i. Review Module > Awards Module > Awards Management Links
 - ii. Options > Deliverable Setup
 - iii. Select Program > Copy Deliverable Setup From Another Program

Note: Select the program you are setting up and then click Copy Deliverable Setup From Another Program button. From the Copy screen, recommend using a standard program like the SFRN program to copy from.

From this screen, select the program you are copying from to the program you are setting up.



- Once deliverables are copied from the program selected, carefully check that all deliverables transferred over appropriately (see example below). Note: Strategic Awards, individual deliverables may need to be edited based on program.

Deliverable Type	Deliverable Description	Frequency	Format	Required	Active	Automatically Added	Nonactive	File/Web Form
Award Agreement	Award Agreement	Once	File	Yes	Yes	No	No	PDF
Award Agreement	Award Agreement	Once	Web Form	Yes	No	Yes	Yes	Configure Web Form
Award Agreement	Award Agreement	Once	Web Form	Yes	Yes	Yes	Yes	Configure Web Form
Award Annual Subject Use Form	Award Annual Subject Use Form	Once	Web Form	No	Yes	No	Yes	Configure Web Form
Award Bank Information	Award Bank Information	Once	Web Form	Yes	Yes	Yes	Yes	Configure Web Form
Award Contract	Data Migration	Manual	Web Form	No	Yes	No	No	Configure Web Form
Award Deduction	Award Deduction	Manual	Web Form	No	Yes	No	No	Configure Web Form
Award Process Budget	Award Project Budget	Once	Budget	No	Yes	No	Yes	Configure Web Form
Change Request	Site Migration	Manual	Web Form	No	Yes	No	No	Configure Web Form
Consent Abandonment or Overlapping Funding	Consent Abandonment or Overlapping Funding	Once	Web Form	No	Yes	Yes	No	Configure Web Form
Consent Faculty Appointment	Consent Faculty Appointment	Manual	Web Form	No	Yes	No	No	Configure Web Form
Consent Fellow Letter	Consent Fellow Letter	Manual	Web Form	No	Yes	No	No	Configure Web Form
Consent IR/IC	Consent IR/IC	Once	Web Form	Yes	Yes	Yes	No	Configure Web Form
Consent IR	Consent IR	Once	Web Form	Yes	Yes	Yes	No	Configure Web Form
Consent Other Industry Funding	Consent Other Industry Funding	Once	Web Form	Yes	Yes	Yes	No	Configure Web Form
Consent Required Degree	Consent Required Degree	Manual	Web Form	No	Yes	No	No	Configure Web Form
Consent Visa	Consent Visa	Manual	Web Form	No	Yes	No	No	Configure Web Form
Data Disposal	Data Disposal Confirmation	Once	Web Form	Yes	Yes	Yes	No	Configure Web Form
Expenditure Report	Expenditure Report	Annual	Budget	Yes	Yes	Yes	No	Configure Web Form
Inventory/Personnel Disclosure	Inventory/Personnel Disclosure	Manual	Web Form	Yes	Yes	No	No	Configure Web Form
Open Science Data Plan/Op-Out	Open Science Data Plan/Op-Out	Once	Web Form	Yes	Yes	Yes	Yes	Configure Web Form
ORCID Administration	Please authorize the American Heart Association to add funding records to your ORCID profile.	Once	Web Form	No	Yes	Yes	No	Configure Web Form
Other	File	No	No	No	No	No	No	Configure Web Form
Prescription Medicine Refills	Prescription Medicine Refills	Once	Web Form	No	Yes	Yes	No	Configure Web Form
Publication Request	Publication Request	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Bank Information Update	Request Bank Information Update	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Campaign	Request Campaign	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Delayed Start/Invoice	Request Delayed Start/Invoice	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Department Change	Request Department Change	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Equipment/Computer Purchase	Request Equipment/Computer Purchase	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request No-Cost Extension	Request No-Cost Extension	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Other	Request Other	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Personnel Effort Change	Request Personnel Effort Change	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Personnel Change	Request Personnel Change	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request PI Change	Request PI Change	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Resignation	Request Resignation	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Science Change	Request Science Change	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Sponsor Change	Request Sponsor Change	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Subcontract	Request Subcontract	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Transfer Institution	Request Transfer Institution	Manual	Web Form	No	Yes	No	No	Configure Web Form
Request Working Leave	Request Working Leave	Manual	Web Form	No	Yes	No	No	Configure Web Form
Scientific Progress Report	Scientific Progress Report	Annual	Web Form	Yes	Yes	Yes	Yes	Configure Web Form
Scientific Progress Report Migrated	Scientific Progress Report Migrated	Manual	Web Form	Yes	Yes	No	No	Configure Web Form

- Scientific Progress Report setup will need to be updated in Pre-Award status from Program Deliverable setup. The occurrence should be changed from Period Start/Close Dates to PROJECT Start/Close Date. This will help to avoid scheduling issues or manual work once the awards are approved/updated to Awarded status.

Frequency Options: [What is this?](#)

Retroactive: No [?](#)

Recurrence:

Scheduling Basis: Project Dates Frequency: Annual Time Due: 5:00pm

First Occurrence / Start By:

Days: 349 After Project Date Project Start Date Date

End By:

Days: 15 Before Project Date Project Close Date Date

Preview: [?](#)

Sample Award Start Date: 07/01/2025

Sample Award End Date: 06/30/2028

[Preview Schedule](#)

Show entries

Due Date
06/15/2026 05:00 PM
06/15/2027 05:00 PM
06/15/2028 05:00 PM

- Once each deliverable is setup in Pre-Award, confirm the date/time for the Center and Project programs and overall setup has been completed. Once status has been changed to Awarded, search for Program in manage awards to confirm the due dates are correctly scheduled, however if they are not, changes can be updated from the deliverable setup for that specific program (Center or Project).
- Additional deliverables to check after the program deliverables have been setup:
 - a. Search program from manage awards and select an award to review the deliverables. Important Note: Some of the following may need to be added or removed manually for each Center and/or Project award.
 - i. Award Agreement deliverable should be the one with upload option.
 - ii. Add Concern Other Industry Funding, Request Bank Information Update (allows the FO to update further information in addition to the Bank Information deliverable), Award Project Budget (Period 1 – allows the FO to edit all periods of the budget), Add either IRB/IACUC continuing renewal concerns for future years, ensure that Scientific Progress Reports and Expenditure Reports have been assigned for future years.
 - iii. Network Project Programs – remove the Bank Information deliverable since all payments will be scheduled through the center.
 - iv. Patient Recruitment Plan Deliverable and Patient Recruitment Report Deliverable

Awarded/Pre-Start Date:

**Complete once awardees are officially selected prior to award start date*

- Peer Review Phase II Chair will notify awardees; SVP will notify the other applicants
- Move from Pre-Award to Awarded Status (*Review Module>Meetings>Committee Application Roster*)
 - *Search committee name (check with Peer Review Team)*
 - *For the ones who got funded change Administrator Actions column to "Awarded" and click "Save Status Change"; the ones not funded change to "Not Funded" then click "Save Status Change". Repeat this step for projects if applicable.*
 - ***If changing award status for a collaborative project, you must first create a committee and then add the applications to the created committee. Then proceed with the above instructions.*
- Award Notifications: Notification will occur in 2 major parts. The first email will notify all applicants when the status of the application has been updated. The second email will only be sent to the applicants with proposals in Pre-Award Status.
 - *Note: When funding decisions are finalized and status have changed, staff can begin to send notifications.*
- Update Award Metrics Excel Sheet
- Review Awards – Confirm that budget, payments, deliverables, etc. are correct
- Update Roster Publisher Sheet in L Drive (*Update using Mail Merge*)
- Pull Payment Projections (*Report Builder>Awards Management>Payment Projections*)
 - *Add totals across and down; make sure they are the same & match the awarded amount*
 - **Important:** *Add the Payment Projection and Award Commitment Report to 2a. Research – New F&S Awards folder within Sharepoint. Once you have added the reports to this folder, email the following people and let them know where the reports have been saved, it's not necessary to also attach these reports to the email.*
 - **Double Check people:** *Send to Finance Team*
- Pull Award Commitment (*Report Builder>Awards Management>Award Commitment Report*)
 - *Add totals down; make sure they match the awarded amount*
 - **Important:** *Add the Payment Projection and Award Commitment Report to 2a. Research – New F&S Awards folder within Sharepoint. Once you have added the reports to this folder, email the following people and let them know where the reports have been saved, it's not necessary to also attach these reports to the email.*
 - **Double Check people:** *Send to Finance*
- Pull Scientific & Lay Summary (*Report Builder>Applications Awards>Award Lay Technical Summary*)
 - *Review, send to another manager and National Director.*
 - *Send to the Communications Team.*
- Pull Center Summaries, Awardee Roster, and RFA
 - *Most important for the RFAs that require the use of the Precision Medicine Platform*
 - *Send to Data Science Team for the PMP*
- Send Correspondence via Proposal Central (*Manage Awards>Send Correspondence*)
 - *Select Recipients & Save Recipients and Compose Message: Select Message Priority, Email Template Award Letter – Strategic Network, Personalize Subject, Save as Draft*
 - *Review for any errors then proceed to send*
- Email awardees Welcome/Start Up Email (*Use template*)

- The Communications Team will publish a press release
 - They may reach out asking for social media handles or other information
 - Awardees CANNOT make an announcement until AHA has officially announced the award

- Payment Set Up (Access Awards>Manage Awards>Select Award>Payments)
 - +Add Recurring Payment: Select next quarterly payment date, Quarterly, Select Auto Generate if it is a HERN. Select Do Not Auto Generate if it is a SFRN (you will have to manually divide the total amount by the length of the award), GL #, Save Recurring Payment
 - Deduct \$50,000 from last scheduled payment
 - +Add Single Payment: Select sequence #, \$50,000, GL #, Hold Payment, **New Payment Added No**, Save and Close

Check #

Routing#: _____

Hold Payment Yes No

Wire Inform: _____

Swift ID: _____

New Payment Added Yes No

Bank Inform: _____

Additional: _____

Comments

Grantor Accou: _____

Account Sub: _____

Award Started:

**Complete once award has started*

- Create At-a-Glance document in coordination with Brand Marketing
 - *Submit request to Workfront*
- Create Map document in coordination with Brand Marketing
 - *Submit request in Workfront*
- Update any Deliverables and Deliverable Due Dates/Times
- Review Award Project Budget and ask for more information needed
 - *Indirect cost should be 10% or less of direct cost*
 - *Formula: total cost - indirect cost = direct cost; then direct cost x 10%*
- If not sent already, send Information Personnel Form to awardees and request headshot photo; save to L Drive
- Create Excel Spreadsheet using information from the Personnel Forms; save to L Drive
 - *Use info to create Awardee Roster using template; save to L Drive*
- Create proposed OAC List; send to SVP and National Director for review; make any needed revisions
 - *Peer Review Team will send list of Peer Reviewers to choose from and recommendations*
 - *Use info to create OAC Roster using template; save to L Drive*