**ResearchUVA PBH: Proposal & Award Conversion Overview**

**What is being converted?**

Pending Proposals and Non-closed Awards are being converted into ResearchUVA PBH Grants.

* Pending Proposals are ePRFs that have been finalized but have not yet been moved to award or marked as declined/withdrawn. The data for pending proposals in ResearchUVA PBH is being pulled from Proposal created from the ePRF.
* Non-closed Awards are awards that are in an active, at-risk, or on-hold status in Oracle. The data for awards in ResearchUVA PBH is being pulled from Oracle. The converted “stub” proposals associated with these awards are populated with minimal data from Oracle.

To be included in conversion, the ePRF must be finalized (which creates the proposal) by June 3 in legacy ResearchUVA or the award must be in a non-closed status in Oracle as of June 2nd.

**What is not being converted?**

Non-funded agreements are not being converted at this time. We plan to convert non-funded agreements at a later date and will update the UVA Research Community when we have more information on the agreement migration plan.

Additionally, ePRFs that are still In Development (or In Progress) will not be converted. They will need to be re-entered in ResearchUVA PBH. Closed awards in Oracle will not be converted. eSPARs will not be converted, so eSPARs that are not finalized will need to be re-entered in ResearchUVA PBH as award mod requests.

**What do converted records look like?**

Pending Proposals will be converted to ResearchUVA PBH as Funding Proposals that are in “Pending Sponsor Review” state. Converted records will include the legacy ResearchUVA ePRF number in the Funding Proposal ID and Short Title. The Short Title will also include the proposal type (if it is a type other than “New”) and the proposal short title from legacy ResearchUVA. For example, the converted pending proposal for ePRF 416424 would have the ID “FP00416424” and its Short Title would be “416424-Renewal-MD-MPHY-Zimmer PSU-CLSF4.”

Oracle awards will be converted to ResearchUVA PBH as Funding Awards in an “Active” state. The Award ID of converted records will include the Oracle Award Number. The Short Title will include the Oracle Award Number and Oracle Award Short Name. For example, the converted award for Oracle award GA11425 would have the ID “UVA0GA11425”, and its Short Title would be “GA11425 EN-MSE-DMREF: Collaborative Re.”

Converted Awards will also have an associated “stub proposal.” Stub proposals include very basic data but are required to complete follow-on actions like revision or renewal proposals. Stub proposals will be in an “Awarded” state. The Funding Proposal ID will include the Oracle Award Number. The Short Title will include the Oracle Award Number and Oracle Short Name. For example, the stub proposal for converted Oracle award GA11425 would have the ID “FP0UVA0GA11425”, and its short title would be “GA11425 EN-MSE-DMREF: Collaborative Re.”

**What do I need to do with converted records?**

At the time of conversion, there are no required actions to be taken on converted proposals or awards. Please review the proposals and awards and update security access as necessary. This action is not required (see “Who has access to converted awards?” for more details).

If a converted pending proposal receives a Just-in-Time request from the Sponsor, please follow the steps in the [Just-in-Time job aid.](https://research.virginia.edu/sites/vpr/files/2022-04/UVA_Job_Aid_Just%20in%20Time_Final.pdf)

If a converted pending proposal is awarded, OSP will create a funding award in ResearchUVA PBH. OSP may request additional information about the award using the Designated Review process.

If changes are required for an active award, request an Award Modification via ResearchUVA PBH. Follow the steps to Request an Award Modification outlined in the [Awards Reference Guide](https://research.virginia.edu/sites/vpr/files/Reference%20Guide-%20Award%20Guide%20for%20the%20Research%20Community.pdf).

If a revision or renewal is needed, create the associated funding proposal from the awarded funding proposal (or “stub” proposal). Follow the steps to create a follow-on proposal in the [Proposal Reference Guide.](https://research.virginia.edu/sites/vpr/files/2022-04/UVA_ResearchUVAPBH_Reference%20Guide_Proposals.pdf) Additionally, utilize the “Manage Access” activity to update the Admin Contact before creating the Revision or Renewal.

**Who has access to converted records?**

Grants Administrative Editors for an organization will have access to all converted Proposals and Awards for that Organization. Please check with the School’s Dean’s Office or OSP for a list of Admin Editors or request to update security roles as needed.

Grants Administrative Editors can “Manage Access” to the converted record at any time. Use the Reviewers tab to review the current Grants Administrative Editors for any record. While not required, it is recommended to use the “Manage Access” activity to ensure that all relevant personnel (such as the Fiscal Contact) have access to necessary records.

For Pending Proposals:

* The Admin Contact on the finalized ePRF will be listed as the Admin Contact in ResearchUVA PBH
* It is recommended to use the “Manage Access” activity to add the Fiscal Contact as an Editor or Reader on the converted proposal. This will ensure access to any future award.

For Active Awards:

* No Admin Contact will be named. It is strongly encouraged that Grants Administrative Editors use the “Manage Access” activity to assign an Admin Contact.
  + If an Admin Contact is not identified when OSP must take action on an award, OSP will work with the department to identify and update the appropriate Admin Contact.
* It is recommended to use the “Manage Access” activity to add anyone else who may need access to the award, such as the Fiscal Contact.