



Adding an Agency into a Pre-award Record

Purpose: As you enter a new Funding Opportunity, you will also need to select the funding Agency (or other entity). If you cannot find the funding agency in RMS, you will need to add in a new funding agency that will be reviewed by Research Services.

Audience: Researcher (Principal Investigator)

Step 1: Click the **+** icon below **Funding Agency/Sponsor**. The search options display

Step 2: Click the **+** icon to add a new agency.

Step 3: Enter the agency's name into the **Operating as** field. This is name that is used to conduct business and maybe an abbreviated form of the legal name.

Step 4: Click the dropdown arrow in the **Type of agency (source)** field to select a type.

Step 5: Enter the website URL for the agency in the **Link to Agency** field.

Step 6: Enter any relevant details into the **Notes** field.

Steps 7: Click **Save & Set Status**.

Steps 8: Select **For Review by Research Services**.

Steps 9: Click **Save & Set Status**.

The screenshot shows the 'Funding Agency/Sponsor' form in the RMS system. The form includes a search bar with a '+' icon (1), a search results dropdown with a '+' icon (2), a 'Key Information' section with fields for 'Operating As' (3), 'Type of agency (source)' (4), and 'Link to agency' (5). A dropdown menu for 'Type of agency (source)' is open, showing a list of agency types with 'NOT-FOR PROFIT' selected (4). Below the form is a 'Set status' section with a radio button for 'For review by Research Services' (8) and a 'Save & set status' button (9).