



Adding an Agency into a Pre-award Record

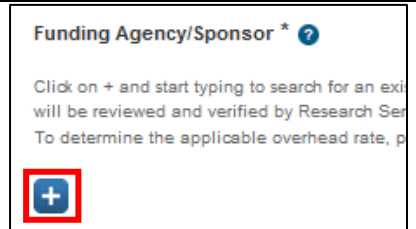
Purpose: As you enter a new Funding Opportunity, you will also need to select the funding Agency (or other entity). If you cannot find the funding agency in RMS, you will need to add in a new funding agency that will be reviewed by Research Services.

Audience: Researcher (Principal Investigator)

To add a new agency related to the funding opportunity within a Pre-award record:


Step 1:

Click the  icon below **Funding Agency/Sponsor**. The search options display.




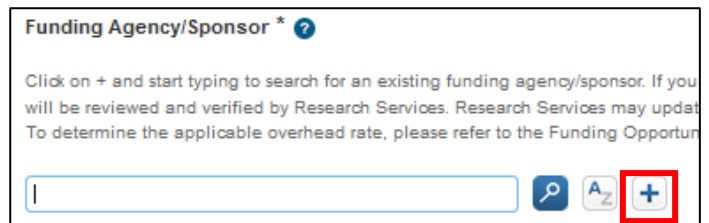
Funding Agency/Sponsor * ?

Click on + and start typing to search for an existing funding agency/sponsor. If you will be reviewed and verified by Research Services, Research Services may update the applicable overhead rate. To determine the applicable overhead rate, please refer to the Funding Opportunity Record.






Step 2:

Click the  icon to add a new agency. The *New Agency* window opens.



Funding Agency/Sponsor * ?

Click on + and start typing to search for an existing funding agency/sponsor. If you will be reviewed and verified by Research Services, Research Services may update the applicable overhead rate, please refer to the Funding Opportunity Record.

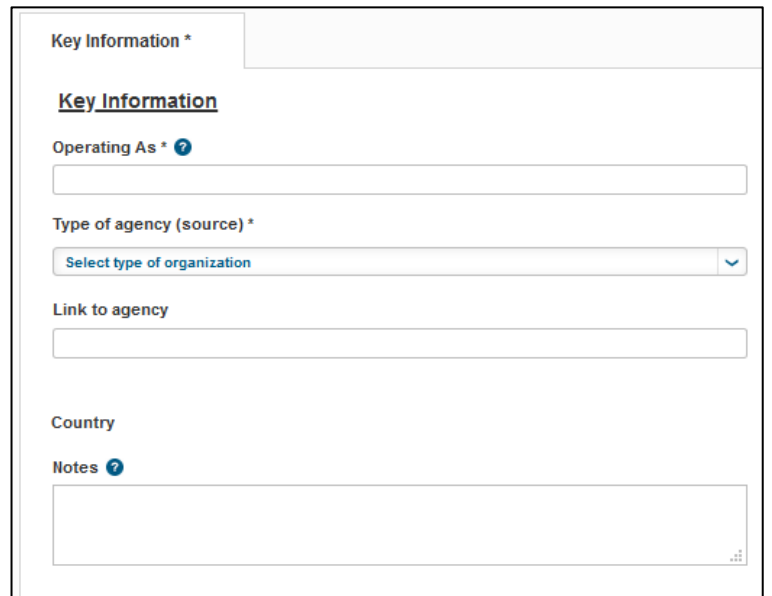
Step 3:

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.

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

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

Enter any relevant details into the **Notes** field.




Key Information *

Key Information

Operating As * ?

Type of agency (source) *

Select type of organization 

Link to agency

Country

Notes ?

Step 4:

Add any supporting documents related to this Agency. Under Attachments, click the blue folder icon, select the file and then click Open.

You can add a description for the attached file(s) in the Description field.



Attachments





Step 5:

Click **Save & Set Status**.

Cancel & Return **Save & set status**

Step 6:

Select For review by Research Services.

Click **Save & Set Status**.

Set status

For review by Research Services
Assigned to Research Services for review

Cancel **Save & set status**