Adding an Agency (from new Funding Opportunity)

Purpose: When creating or editing a Pre-Award record, as you enter a new Funding Opportunity, you will need to select the agency (or other entity) that is offering the funds. This situation may also arise from the Post Award setting where grant funding has been secured from a new source.

Audience: RSO/RF/PI

Step 1:
If this agency does not appear in the search field, you can add it by clicking the + button.

Funding Agency/Sponsor

1.

Step 2:
Enter the agency's operating name.

Key Information *   **Details**

Key Information

Step 3:
Select the type of agency from the dropdown list.

Operating As *
2. Tom and Martha Wayne Memorial Foundation

Type of agency (source) *
3. Foreign Associations, Societies & Foundations

Step 4:
If the agency is commonly known by an acronym, enter it here.

Acronym
4. WF

Step 5:
Paste the URL linking to the agency's website

Link to agency
5. www.tmwmf.com

Step 6:
Enter any alternate names by which the agency is known, such as names in other languages.

Alternate Name(s)
6. Wayne Foundation, Foundation Wayne

Step 7:
If the legal name of the agency is different from its operating name, enter it here.

Legal Name
7. Wayne Foundation USA LLC

Step 8:
If the agency has changed its identity, select its previous operating name here.

8.

Previously known as	
Name	**Name Changed**
Tom and Martha Wayne Memorial Foundation	

Step 9:
Select and enter the country in which the agency is based.

9. Country

Canada (CA)

Step 10:
Add any relevant notes about the agency.

10. Notes

Funding advanced engineering research

Step 11:
Click **Save & set status** to save the agency.
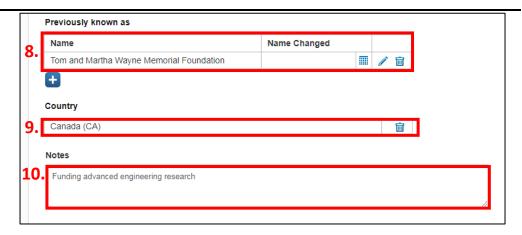
11. Save & set status

Step 12: (PI skip to step 14)
Change the status to <u>For review by Project Maintenance</u>. Project Maintenance will verify the information and ensure that it matches the agency details entered in PeopleSoft.
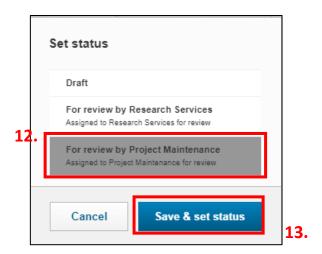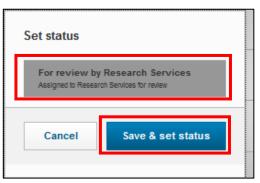
Set status

Draft

For review by Research Services
Assigned to Research Services for review

12. For review by Project Maintenance
Assigned to Project Maintenance for review

Step 13:
Click **Save & set status** to save the agency and return to the last page.

Cancel | Save & set status

13.

Step 14. For the Principal Investigator, complete the above **steps 1 to 11.** When you are ready to submit for review, *click Save & Set Status* (as shown in **Step 11** above), and save the status of <u>For Review by Research Services</u> by clicking **Save & Set Status** one more time:

Set status

For review by Research Services
Assigned to Research Services for review

Cancel | Save & set status