

Stanford University

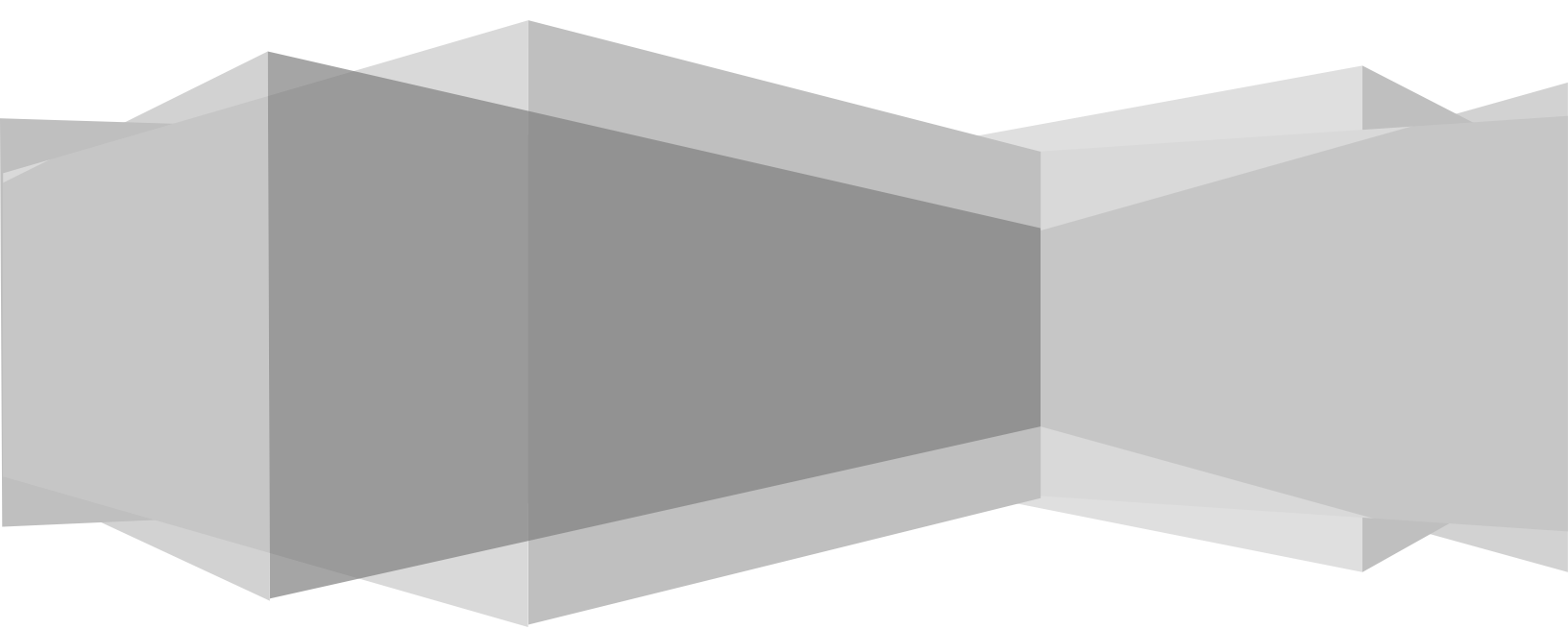


STANFORD ELECTRONIC RESEARCH ADMINISTRATION

# Sponsored PTA Manager PTA Amendment

## User Guide

Version 1.1



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# Overview

## Purpose

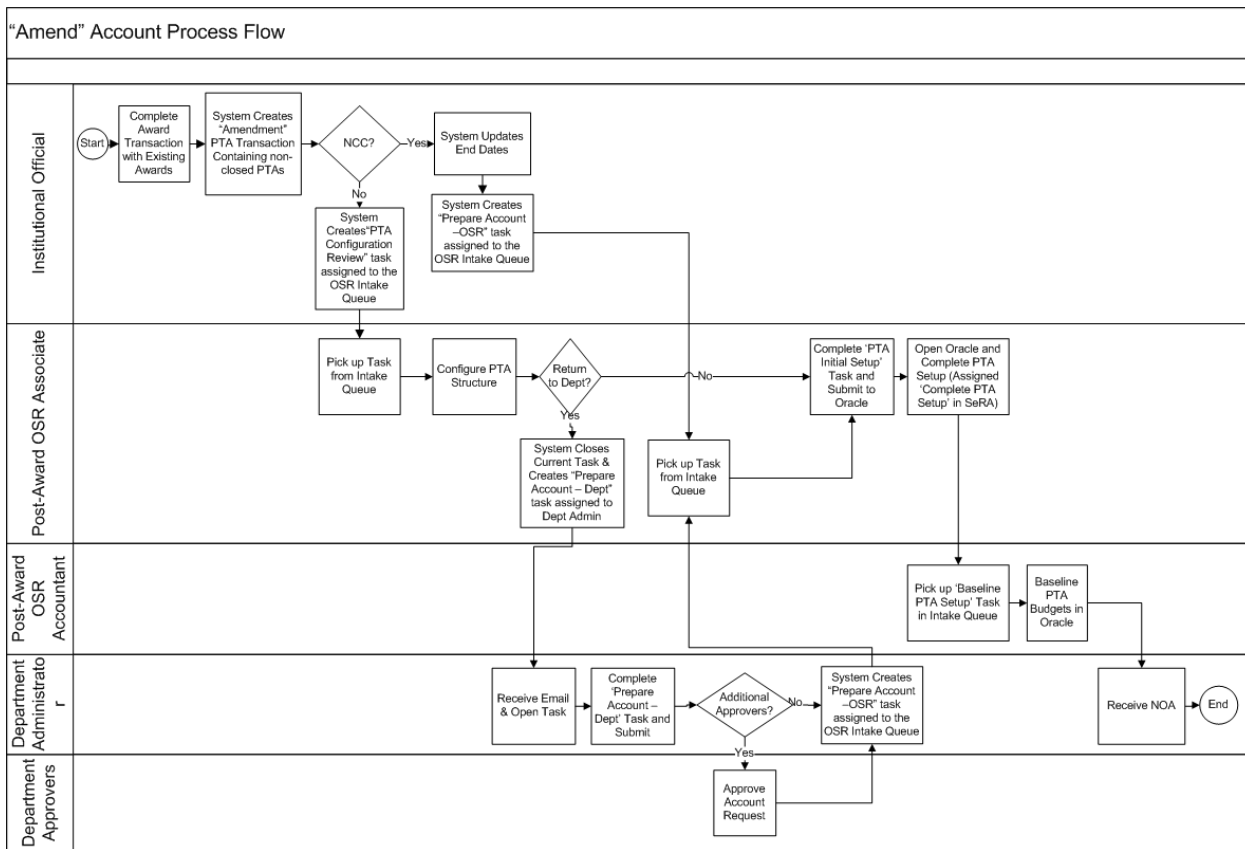
The purpose of this guide is to provide post award administrators with instructions on how to process Amend PTA requests within PTA Manager (also referred to as SeRA). It will cover the three main Amendment scenarios: Increasing time and/or money, decreasing time and/or money, and administrative changes.

This document should be used in conjunction with the *Oracle Guide to Setting up Projects, Tasks and Awards* as it contains more detailed information on how to appropriately fill out required data fields. Also see the SeRA User Guides, *Sponsored PTA Manager, New Account Setup* and *Sponsored PTA Manager, Early/Extend PTA Transaction*.

The SeRA guides can be found on the DoResearch website at:

<http://doresearch.stanford.edu/research-offices/sponsored-research-osr/stanford-electronic-research-administration-sera/learn-about>

## Process Flow



# Increasing Time and/or Money

## 1. Review AAN and Oracle

- Open AAN and review remarks section and attached agreement to verify accuracy of AAN
- If necessary, look in Oracle to see full award information
- Verify PTA Configuration
- Determine if existing award needs to be amended, the types of changes that need to be made, and if a new award needs to be added

**Stanford Electronic Research Administration**

Dashboard | **SPO #45480 (S1)** | Agreement Number: 2009VJ19961 | Sponsor: Semiconductor Research Corporation  
Goodson, Kenneth E. | Agreement Type: Contract | Prime Sponsor: Mechanical Engineering

**Transaction**

- Project
- Transaction Home
- Agreement Summary
- View PDRF
- View AAN
- View PTA Details
- View PTA Budget

**Amend Account Request**

PTA Transaction ID: PTA544341  
Assigned to: Davis, Francine E.  
Status: PTA Configuration Review - OSR

PTA Configuration | UBRET | Submit PTA

Award (UBRET) | Add Project

Project	Task	Task
Project (1130367)	Electrothermal Engineering and	Add Task
	Task 1	1_SRC_Goodson

Add Award

If a new award is needed, click “Add Award” and follow normal PTA Setup procedures. See next section for editing an existing award.

## 2. Edit Existing Award (Additional Time and/or Money)

If the existing award needs to be modified, click on award, then Edit Award.

**SPO #143 (Segment 8)** | Agreement Number: 4R37DK03145032 | Sponsor: National Institutes of Health  
Solomon, Edward I. | Agreement Type: Grant | Prime Sponsor: Chemistry Department

**Amend Account Request**

PTA Transaction ID: PTA540875  
Assigned to: Davis, Francine E.  
Status: PTA Configuration Review - OSR

PTA Configuration | **WAPAA** | WAFIV | PAFIS | Submit PTA

Award (WAPAA) - Cost Share

Guarantee Account: AABRR 1028779 1  
Award Project Task

Guarantee Amount

Award Full Name: COST SHARE: SPECTROSCOPIC STUDIES OF ACTIVE SITES IN COPPER PROTEINS  
Award Manager: Caron, Edward(ecaron)  
Owning Organization: QCIP-Chemistry  
Award Start Date: 01-SEP-2007  
Award End Date: 31-AUG-2016

Edit Award

Enter Additional Award Funding Amount and change the End Date, if needed. Update other fields as required.

If you are simply increasing time, you only need to update the Award. If you are increasing funding, you need to update the Award, Project and Tasks.

*Note: You cannot reduce time or reduce funding amount. These must be done Oracle (see Section “Reducing Time and/or Money”).*

Edit Award (PAFIS)

* Award Number	PAFIS
* Current Oracle Funding Amount	\$741,360.38
* Additional Award Funding Amount	\$0.00
* Award Short Name	143_NIH_SOLOMON
* Award Full Name	Spectroscopic Studies of Active Sites in Copper Pro
* Award Manager	Caron, Edward (ecaron)
* Owning Organization	QCIP-Chemistry
* Closeout Team	H & S
* Award Purpose	INR_RES_RSCH
* Award Type	SPO_FED_GRANT-Grant with the US Federal Government...
* Award Status	Active
* Award Config Code	- Select Award Config Code -
Pre-Award Date	31-AUG-2012
* Start Date	01-SEP-2012
* End Date	31-AUG-2016
* Funding Source Name	NATIONAL INSTITUTES OF HEALTH LOC
* Customer Number	2576
* Allowed Cost Schedule	ACS_FEDERAL
* IDC Cost Rate Schedule	FY12_RSCH_ON_GOV
* Billing Distribution Rule	Cost
* Revenue Distribution Rule	Cost
* Billing Cycle	Daily
* Billing Term	IMMEDIATE
Award A-Z Free Form Field	
Award Level of Control	Faculty or PI
Award Level of Restriction	Highly Restricted

Cancel Save

### 3. Edit Existing Project

- a. Edit the project by clicking the blue project line.

#### Amend Account Request

PTA Configuration		WAPAA	WAFIV	PAFIS	Submit PTA
Award (WAPAA) - Cost Share					
Guarantee Account	AABRR 1028779 1				
	Award	Project	Task		
Guarantee Amount					
Award Full Name	COST SHARE: SPECTROSCOPIC STUDIES OF ACTIVE SITES IN COPPER PROTEINS				
Award Manager	Caron, Edward(ecaron)				
Owning Organization	QCIP-Chemistry				
Award Start Date	01-SEP-2007				
Award End Date	31-AUG-2016				
Projects and Tasks					
Project (1018618) - - NIH 1R01 DK31450-01 SOLOMON					
Task 700 SOLOMON 143 C/S					
Project Budget					
Project (1018618) - - NIH 1R01 DK31450-01 SOLOMON					
<a href="#">Edit Budget</a>					
Project Amount:		\$688,767.07			
Amount Allocated:		\$131,553.07			
Amount Remaining:		\$557,214.00			

000:1874335062683278::NO:::#dynamic-tab

- b. Enter additional funding amount as needed. Edit other fields as needed.

Edit Project	
Current Oracle Funding to this Project \$741,360.38	
* Additional Amount Funding to this Project	\$0.00
* Project Name	NIH 1R01 DK31450-01 SOLOMON
* Project Description	NIH 1R01 DK031450-01 SOLOMON 1-1-82 TO 12-
* Project Config Code	- Project Config Code -
* Principal Owner	Solomon, Edward I. (solomone) <input type="button" value="x"/> <input type="button" value="up"/>
* Project Manager	Caron, Edward (ecaron) <input type="button" value="x"/> <input type="button" value="down"/>
* Owning Organization	QCIP-Chemistry
Project A-Z Free Form Field	
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

- c. Edit task and complete required fields.

**Edit Task**

**\* Task Number** 100

**\* Task Name** NIH 2 R01 DK031450-3

**\* Long Task Name** NIH 2 R01 DK031450-3

**\* Task Configuration Code** -- Select Task--

**\* Start Date** 09-SEP-1990

Completion Date

**\* Task Activity** SPONSORED\_RESEARCH

**\* Task Off Campus** No

**\* Task Description** NIH 2 R01 DK031450-32

**\* Principal Owner** Solomon, Edward I. (solomone)

**\* Task Manager** Dinh, Linh (ldinh)

**\* Owning Organization** QCIP-Chemistry

Task A-Z Free Form Field

Does ISC apply? No

**\* Will sponsor pay ISC?** No

Cancel Save

**Note:** The "Completion Date" is only used if the task is being closed; otherwise it should be left blank.

## 4. Update Budget

- a. Update the budget by clicking "Edit Budget" from the Award tab.

### Amend Account Request

PTA Configuration
WAPAA
WAFIV
PAFIS
Submit PTA

Award (WAPAA) - Cost Share

**Guarantee Account** AABRR 1028779 1  
Award Project Task

**Guarantee Amount**

**Award Full Name** COST SHARE: SPECTROSCOPIC STUDIES OF ACTIVE SITES IN COPPER PROTEINS

**Award Manager** Caron, Edward(ecaron)

**Owning Organization** QCIP-Chemistry

**Award Start Date** 01-SEP-2007

**Award End Date** 31-AUG-2016

Projects and Tasks

[Project \(1018618\) -- NIH 1R01 DK31450-01 SOLOMON](#)

[Task 700](#) SOLOMON 143 C/S

Project Budget

Project (1018618) -- NIH 1R01 DK31450-01 SOLOMON

Edit Budget

<b>Project Amount:</b>	\$688,767.07
<b>Amount Allocated:</b>	\$131,553.07
<b>Amount Remaining:</b>	\$557,214.00

- b. You can update the budget either by task or expenditure type. Click the pencil icon to update the specific expenditure type or task.

Award and Project Budget

<b>Award:</b>	UBRET
<b>Project:</b>	Project (TBD) - Electrothermal Engin
<b>Project Amount</b>	\$250,000.00
<b>Amount Allocated</b>	\$200,000.00
<b>Amount Remaining</b>	\$50,000.00

Budget Information

\* **Version Name**

\* **Description**

Project Budget Detail
Budget by Task
Budget by Expenditure Type

**Activity:** SPONSORED\_RESEARCH On Campus

Expenditure Category/Type +	Task 1	Expenditure Totals
<input checked="" type="checkbox"/> 50001 UNALLOCATED EXP	\$7,100.00	\$7,100.00
<input checked="" type="checkbox"/> 51700 FRINGE & OTHER BENEFITS	\$5,324.00	\$5,324.00
<input checked="" type="checkbox"/> 56900 INDIRECT COSTS	\$55,636.00	\$55,636.00
<input checked="" type="checkbox"/> 51115 RBE PROFESSOR	\$3,094.00	\$3,094.00
<input checked="" type="checkbox"/> 51125 RBE PROFESSOR RSRCH	\$3,366.00	\$3,366.00
<input checked="" type="checkbox"/> 51450 RSRCH ASST GRAD	\$73,842.00	\$73,842.00
<input checked="" type="checkbox"/> 51935 TUITION ALLOWANCE	\$51,638.00	\$51,638.00
	<b>\$200,000.00</b>	<b>\$200,000.00</b>



- c. Enter the additional amounts.

*Note: When entering the funding to the “additional amount”, once pushed through Oracle, the additional amount will be added to the most recently used budget column. If multiple budget columns in Oracle currently contain funding data, the additional amount will be added to the most recent column with data, and NOT the most current budget month column. To avoid this, you can add the total amount to expenditure type 50001 in SeRA and re-allocate the funds in Oracle (after “Send to Oracle Financials”) per the SeRA budget.*

Edit Budget by Task			
TASK 1			
Expenditure category/type	Previous Amount	Additional Amount	Total
50001 UNALLOCATED EXP	\$7,100.00	<input type="text" value="5000"/>	\$7,100.00
51115 RBE PROFESSOR	\$3,094.00	<input type="text" value="20000"/>	\$3,094.00
51125 RBE PROFESSOR RSRCH	\$3,366.00	<input type="text" value="5000"/>	\$3,366.00
51450 RSRCH ASST GRAD	\$73,842.00	<input type="text" value="20000"/>	\$73,842.00
51700 FRINGE & OTHER BENEFITS	\$5,324.00	<input type="text" value="\$0.00"/>	\$5,324.00
51935 TUITION ALLOWANCE	\$51,638.00	<input type="text" value="\$0.00"/>	\$51,638.00
56900 INDIRECT COSTS	\$55,636.00	<input type="text" value="\$0.00"/>	\$55,636.00
<b>Total:</b>	<b>\$200,000.00</b>	<b>\$0.00</b>	<b>\$200,000.00</b>

- d. Ensure Amount Remaining is 0 after updating all awards and projects for this transaction.

Award and Project Budget	
<b>Award:</b>	UBRET
<b>Project:</b>	Project (TBD) - Electrothermal Engin
<b>Project Amount</b>	\$250,000.00
<b>Amount Allocated</b>	\$250,000.00
<b>Amount Remaining</b>	\$0.00

Budget Information	
* <b>Version Name</b>	<input type="text" value="Award - Amendment"/>
* <b>Description</b>	<input type="text" value="Award - Amendment"/>

You can enter the description of the amendment under Version Name and Description (ie “MOD: ADD’L FUNDING OF...”)

- e. Click Save and “Return to Award Details” button

## 5. Submit to Oracle

Click the “Submit PTA” tab. Enter any notes for the accountant. Click Check for Errors if you would just like to validate; click Send to Oracle Financials when you are ready (this will also check for errors).

Stanford Electronic Research Administration

Dashboard SPO #45480 (\$1)  
Goodson, Kenneth E. Agreement Number: 2009VJ19961 Sponsor: Semiconductor Research Corporation  
Transaction Mechanical Engineering Agreement Type: Contract Prime Sponsor:

Project  
Transaction Home  
Agreement Summary  
View PDRF  
View AAN  
View PTA Details  
View PTA Budget

Actions  
Reassign Task  
Send Back to Department  
Return to IO  
Reactivate Closed Awards  
Refresh from Oracle  
Close Current Task  
Terminate Transaction

Unit Testing Dashboard

PTA Configuration UBRET **Submit PTA**

You have completed details necessary for creating a financial account in Oracle.  
Click on the View PTA Details link in the navigation panel to review all PTAs and its associated details being setup in this transaction.  
Click on the PTA Configuration tab and/or individual award tab(s) to make any edits.

Comments

Check For Errors Send To Oracle Financials

PTA Transaction ID: PTA544341  
Assigned to: Davis, Francine E.  
Status: PTA Configuration Review - OSR

## 6. Review in Oracle and Submit the Award Budget(s)

- Go to Oracle to review the record by comparing it against the AAN and award agreement for accuracy.

Navigator - SU GA Research Accountant

Functions Documents

Awards  
Enter and Maintain Awards

Awards  
Projects  
Capital Projects  
+ Budgets  
+ Expenditures  
+ Billing  
Award Status  
Project Status  
+ Government Reports  
+ Reports

Top Ten List

Find Award

Award  
Search For: Templates, Awards  
Number  
Short Name  
Type  
Status  
Organization

Key Member  
Name  
Number  
Role

Funding Source  
Number  
Name

Clear Find

- Once the review has been completed in Oracle, go to the Award Budgets screen and press the **Submit** button.
- If all the awards affected by the amendment have their budgets submitted in Oracle, SeRA will automatically send the amend transaction to the accountant. If there are active awards that were not affected by the amendment (i.e., no updates were required), return to SeRA and assign the task to the accountant manually.

## 7. Accountant Procedures – Review and Close

Note: A Notice of Award (NOA) will not be automatically generated unless all active awards are baselined in Oracle. In many cases, the amendment will only affect some, but not all, of the awards in the project.

### a. Review the information in Oracle

The screenshot shows the Oracle Award Budgets interface. The 'Find Budget' section includes fields for Award Number (UAODD), Project Number (1160943), Budget Type (Approved Cost Budget), Award Name (110915\_HODDER\_THIEL FDN), and Project Name (Excavation and Analysis). The 'Draft Budget' section shows Version Name (INITIAL FUNDING OF \$30,000 THRU 1/3), Status (Working), Change Reason, Description (INITIAL FUNDING OF \$30,000 THRU 1/31/14), and Entry Options (Entry Method: STANFORD\_TOP\_AND\_LOWE, Resource List: RL\_STANDARD). A 'Totals' table is displayed below:

Labor		Burdened		Revised Date
UOM	Quantity	Raw Cost	Cost	
Draft Hours	0.00	0.00	30,000.00	29-APR-2013 08:13:16
Current Hours	0.00	0.00	30,000.00	08-MAR-2013 15:44:34

Buttons at the bottom include History, Copy Actual..., Rework, Submit, and Details.

### b. All Awards Baselined

If all awards were baselined, then the NOA will be generated a few minutes after the last award is baselined. The transaction is complete.

### c. Not All Awards Baselined

For amend transactions in which not all awards are baselined, you must return to SeRA to manually generate the NOA:

The screenshot shows the Oracle Sponsored PTA Manager interface. A 'Complete Transaction' dialog box is open, prompting the user to click 'Complete Transaction' to manually close the transaction. The dialog includes a 'Comments' field and buttons for 'Cancel' and 'Complete Transaction'. A blue arrow points to the 'Complete Transaction' button in the left-hand navigation menu.

Return to Sponsored PTA Manager to retrieve the record from your Dashboard. Select **Complete Transaction** from the left-hand navigation menu. After entering comments, click the “Complete Transaction” button to trigger the system to generate an NOA. You are now finished.

# Reducing Time and/or Money

To **reduce time or reduce money**, changes must be made in Oracle – they cannot be made in SeRA. Go to Oracle Financials, make any changes required, and save the updated award. You may also need to submit and baseline the award if changes were made to the budget.

## 1. Oracle Procedures

### a. Open Award Budget screen

**Find Budget**

Award Number: QAPOT      Award Name: 104865-NSF\_POTTS  
 Project Number: 1154320      Project Name: Bringing Sentiment Analysis  
 Budget Type: Approved Cost Budget     

**Draft Budget**

Version Name: DECREASE FUNDING OF \$306,339 THRU 5/31/15      Status: Working  
 Change Reason:   
 Description: DECREASE FUNDING OF \$306,339 THRU 5/31/15       New Original

**Entry Options**

Entry Method: STANFORD\_TOP\_AND\_LOWE\$      Resource List: RL\_STANDARD

**Totals**

	UOM	Quantity	Raw Cost	Burdened Cost	Revised Date
Draft	Hours	0.00	0.00	690,105.00	07-MAY-2013 07:59:46
Current	Hours	0.00	0.00	383,766.00	01-JUN-2012 14:17:19

### b. Go to Budget Lines. Reduce funding per AAN. Click Submit and Baseline.

**Budget Lines - 1154320, QAPOT**

Version Number: Draft      Version Name: ADD'L FUNDING OF \$306,339 T  
 Task Number: 100      Task Name: 104865\_NSF\_POTTS  
 View Lines For: BURDENED COST      Periods For Totals: JUN-2012 - JUL-2012

Budget Periods: Earliest: JUN-2012      First: JUL-2012      Latest: JUL-2012

Resource	Amount Type	JUL-2012	AUG-2012	SEP-2012	OCT-2012	Period Totals
51100	Burdened Cost	125,944.00				274,841.00
51700	Burdened Cost	13,508.00				34,716.00
52401	Burdened Cost	8,500.00				14,500.00
53101	Burdened Cost					36,394.00
54201	Burdened Cost	4,000.00				8,000.00
55201	Burdened Cost	800.00				1,600.00
56900	Burdened Cost	87,066.00				190,184.00
57000	Burdened Cost	66,519.00				129,870.00
<b>Totals</b>	<b>BURDENED COST</b>	<b>306,339.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>690,105.00</b>

Change Reason:       Comments:

c. Reduce funding in **Project Funding** and **SAVE**.

Project Number	Task Number	Amount	Date
1154320		690,105.00	01-JUN-2012

Project Name: Bringing Sentiment Analysis      Task Name:

**Note:** If an error message appears when funding is decreased under **Project Funding**, contact A/R – an event might exist which A/R has to remove.

d. Go to **Award Management**. Reduce funding in **Direct Cost** under **Installment** Tab. **SAVE**

Operating Unit: SU\_OPERATING\_UNIT  
 Number: QAPOT     Template    Funding Source Name: NATIONAL SCIENCE FO  
 Short Name: 104865-NSF\_POTTS    Funding Source Award Number: IIS-1159679  
 Full Name: Bringing Sentiment Analysis and so    Pre-Award Date:   
 Start Date: 01-JUN-2012    End Date: 31-MAY-2015  
 Close Date: 31-MAY-2018    Award Type: SPO\_FED\_GRANT  
 Purpose: INR\_RES\_RSCH     Revenue Hard Limit    Status: Active  
 Organization: MSLP     Invoice Hard Limit    Funded Amount: 690,105.00  
 Award Amount: 690,105.00    Funding Summary [S]

Number	Issue Date	Type	Direct Cost	Indirect Cost	Total	Active	Billable	I	J
ADD	21-MAY-2012	Award	690,105.00	0.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reports      Project Funding

## 2. SeRA Procedures

Once the changes in Oracle are complete, you must then return to SeRA and use the **“Refresh from Oracle”** button to pull in the latest version of the award data from Oracle. Once this is complete, you can make any other changes needed in SeRA (e.g., adding a new award, etc.) and finally send your completed PTA back to Oracle via the **“Send To Oracle Financials”** button.

<b>Dashboard</b>	<b>SPO #143 (Segment 8)</b>		<b>Agreement Number:</b> 4R37DK03145032							
<b>Transaction</b>	Solomon, Edward I. Chemistry Department		<b>Agreement Type:</b> Grant							
<b>Actions</b>	<b>Amend Account Request</b>									
<b>Unit Testing Dashboard</b>	<table border="1" style="width: 100%; text-align: center;"> <tr> <td style="background-color: #f0e68c;">PTA Configuration</td> <td style="background-color: #f0e68c; color: white;">PAFIS</td> <td style="background-color: #f0e68c;">WAFIV</td> <td style="background-color: #f0e68c;">WAPAA</td> <td style="background-color: #f0e68c;">Submit PTA</td> </tr> </table>				PTA Configuration	PAFIS	WAFIV	WAPAA	Submit PTA	
PTA Configuration	PAFIS	WAFIV	WAPAA	Submit PTA						
Project Transaction Home Agreement Summary View PDRF View AAN View Award Budget View PTA Details View PTA Budget	<p><b>Award (PAFIS) -</b></p> <p><b>Award Full Name</b> Spectroscopic Studies of Active Sites in Copper Proteins  <b>Award Manager</b> Caron, Edward(ecaron)  <b>Owning Organization</b> QCIP-Chemistry</p> <p><b>Projects and Tasks</b></p> <p><a href="#">Project (1018618) - - NIH 1R01 DK31450-01 SOLOMON</a> <span style="float: right;"><a href="#">Task 100</a> NIH 2 R01 DK031450-3</span></p> <p><b>Project Budget</b></p> <p>Project (1018618) - - NIH 1R01 DK31450-01 SOLOMON</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;"><b>Project Amount:</b></td> <td style="text-align: right;">\$741,360.38</td> </tr> <tr> <td><b>Amount Allocated:</b></td> <td style="text-align: right;">\$741,360.38</td> </tr> <tr> <td><b>Amount Remaining:</b></td> <td style="text-align: right;">\$0.00</td> </tr> </table>				<b>Project Amount:</b>	\$741,360.38	<b>Amount Allocated:</b>	\$741,360.38	<b>Amount Remaining:</b>	\$0.00
<b>Project Amount:</b>	\$741,360.38									
<b>Amount Allocated:</b>	\$741,360.38									
<b>Amount Remaining:</b>	\$0.00									
Reassign Task Send Back to Department Return to IO <b>Refresh from Oracle</b> <b>Complete Transaction</b> Terminate Transaction										

Please note: The **“Refresh from Oracle”** button will eliminate any changes you have made in SeRA when it is used. Any PTA changes that need to be made in SeRA must be made *after* the required changes have been made in Oracle and the **“Refresh from Oracle”** has been completed.

After the information has been submitted to Oracle, and all fields have been properly updated, click the submit button. This will move the transaction to the pending baseline review state. After the record has been baselined in Oracle, an NOA will be automatically generated, which completes the process.

# Administrative Changes

There may be times when an amendment does not require Oracle updates and/or baselining. The most common are:

## 1. No Action

When no changes need to be made in Oracle at all, the post-award associate can reassign the transaction to an accountant for review. The reassignment comments should explain why no changes need to be made in Oracle. Once the accountant has reviewed the AAN and the comments, if they agree that no changes need to be made, they can use the “**COMPLETE TRANSACTION**” button to skip the Oracle steps and issue the NOA directly.

## 2. Administrative

If the amendment requires an Oracle update, but does not require all (or any) of the awards to be baselined, the associate can make the required changes in SeRA, send the changes to Oracle, and submit the affected budgets in Oracle. At that point, they may reassign the SeRA transaction to an accountant, explaining in the comments 1) what changes were made, and 2) why they did not submit all (or any) of the budgets in Oracle. Once the accountant receives the transaction, they will verify the associate’s notes, baseline whatever needs to be baselined in Oracle (if anything), and then use the “Complete Transaction” button.

- a. Click **Reassign Task** link.

**Stanford Electronic Research Administration** VROA  
Sign out  
Version: 1.0.0.1

**SPO #109177 (Segment 1)**  
Red-Horse, Mary K. Agreement Number: 13-SSP-261 Sponsor: Searle Scholars Program  
Biology Department Agreement Type: Grant Prime Sponsor:

**Amend Account Request** PTA Transaction ID: PTA546933  
Assigned to: Roa, Vilma S.  
Status: PTA Configuration Review - OSR

**PTA Configuration** | **UADZM** | **WADJY** | Submit PTA

Award (UADZM)	Sponsor	Add Project	
Project (1161724)	Molecular networks reg_89260	Non-Capital	Add Task
	Task 100	109177_Red-Horse	Sponsor

Award (WADJY)	Cost Share	Add Project	
Project (1161724)	Molecular networks reg_89260	Non-Capital	Add Task
	Task 700	109177_Red-Horse_C/S	Cost Share

- b. Enter your comments and Click **Reassign**. Now the task belongs to the designated Research Accountant who will finish the transaction.

Reassign Task to Someone Else

Select OSR Name: Wenyi Christainsen

Comments: NOA Admin change: Per the department / PI, PI effort should be corrected to reflect no summer effort for this project, per award notice re-budgeting or

207 of 2000

Cancel Reassign

- c. ACCOUNTANT: To finish the transaction, retrieve the record from your dashboard, and click **COMPLETE TRANSACTION** to issue the NOA.

Dashboard

Transaction

- Project
- Transaction Home
- Agreement Summary
- View PDRF
- View AAN
- View Award Budget
- View PTA Details
- View PTA Budget

Actions

- Reassign Task
- Send Back to Department
- Return to IO
- Refresh from Origin
- Complete Transaction**
- Terminate Transaction

Unit Testing Dashboard

SPO #143 (Segment 8)

Complete Transaction

Click "Complete Transaction" to manually close this transaction.

Comments

Cancel Complete Transaction