GC70 Form

Request to Establish an Anticipation or to Use Expired or Overdrafted Grant/Fund
Learning Objectives

- Participants will be able to:
  - Recognize when to use the online GC70 form
  - Identify features and who will use the system
  - Describe how to request access/permissions to the system
  - Demonstrate how to make an initial request
  - Explain how to view/extend prior requests
When to Use a GC70 Form

- When you need to request the set up or continued use of grant fund accounts to address:
  - Preaward costs
  - Costs prior to award execution
  - Overdrafts
  - Continuations
  - Expired awards
  - Extensions of any of the above type requests:
    - add additional time
    - change the amount requested
    - make some other modification
Features of the Online GC70 System

- Web-based
- Electronic routing and notification
- Status information for requests
- Auto-population of most demographic information
- Access to historical requests
- Ability to extend prior requests
Who Will Use the Online GC70 System

- “Department Requesters”
- “Authorized Signatories”
- PIs, for certain types of requests
- GCO Post-Award (all campuses)
- Urbana: OSP notifications
- E-mails 1-3 Status Notifications
Access/Permissions to the System

- Department Requesters: will fill out the electronic Request Authorization form
- PI: access is automatic (per request), based on the proposal/grant PI. Log in using URL in e-mail
- Authorized Signatory: access is automatic (per request) once assigned. Log in using URL in e-mail
- All users: authenticated with EAS (same as Banner)
How to Request Access

- Log in at:
  - https://apps.obfs.uillinois.edu/GC70/index.cfm

- Fill out the Request Authorization form

- Be sure to provide all of the chart-orgs for which you will need access
How to Request Access

- Send the e-mail you receive to the appropriate administrator in your unit
- Approver forwards affirmative e-mail to GCO
- GCO adds you as a Department Requester for each of the chart-orgs you requested
How to Request Access

- Log in again at: https://apps.obfs.uillinois.edu/GC70/index.cfm
- You can now access the system and begin
Making an Initial Request

- Basic Workflow

1. Department Requester creates and submits a request
2. System sends e-mail to Authorized Signatory (and PI if applicable) to review and approve the request
3. Authorized Signatory (and PI if applicable) approves or returns the request
   - If returned: System sends e-mail notifications to Department Requester and non-rejecting approver (if applicable)
   - If approved: System sends e-mail notification to Department Requester that the request has been received by GCO
4. GCO reviews
   - If preaward request: There may be a period where post-award is working with pre-award prior to approval/disapproval; this will show when you check status of the request
5. GCO approves/disapproves request
6. System sends e-mail to notify Department Requester of approval/disapproval
7. GCO sets up/updates grant and fund info as needed and notifies Department Requester when complete
Making an Initial Request - Proposal

- Proposal types: New/Renewal
  - Preaward costs
  - Costs after award start date, but award is not fully executed

- Use the Proposal Reference Number (Institutional ID from myResearch Portal) or PI (Name or UIN)
- Be sure to indicate new or renewal
Making an Initial Request - Proposal PI Search

- PI search usually has multiple results
- Several reasons why you may not find expected results
  - Proposal(s) not in the chart-org(s) for which you have permissions
  - Proposal(s) have status such as terminated that are not eligible
  - PI name or UIN incorrectly entered
Making an Initial Request - Awarded

- **Awarded types:**
  - Continuations
  - Overdraft
  - Expired

- Use the Grant Code (Banner)
Making an Initial Request – What if I…

- Enter a proposal reference number or grant code that has a request already in process?
  - You will get an error message that there is already a request with that proposal reference number or grant code.

- Enter a proposal reference number or grant code of a request that has already been approved/disapproved by GCO?
  - You will get an error message that a request with that proposal reference number or grant code has already been completed. If you want to extend/update a prior request, go to the View/Extend tab.

- Enter a proposal reference number or grant code that was already processed on paper?
  - The system will allow you to start a request by that number, but you should indicate on the request that this is an extension of an earlier paper request.

- Enter a proposal reference number or grant code that is not in one of my chart-org permissions?
  - You will get a message that you do not have permissions for that item, and a link to the request permissions page so you can request access, should you need it.
Making an Initial Request – Fill Out the Request

- Things you will see on both proposal and awarded grant requests
  - Pre-populated data (color background)
  - Amount, timeframe
  - Special Considerations: notes regarding human subjects, etc.
  - Authorized Signatory
  - Notifications: Department Requester
  - E-mails 1-3 Status Notifications
  - Comments to GCO
Making an Initial Request – Fill Out the Request

- Renewal type proposal requests have one slight difference:
  - Renewal Project Information includes Previous Grant Code
  - Number associated with a prior award associated with a proposal which will receive its own new Grant Code.
Making an Initial Request – Fill Out the Request

- Things that are different on awarded grant requests:
  - Pre-populated data slightly different
  - Type of request: indicate nature of request
  - Chart-fund(s) impacted
  - Special Considerations are reminders, no checkbox to mark.
Making an Initial Request – Save the Request

- To continue working at a later time, use the Save Request icon:
  - Will check the fields you have filled out, but don’t have to have all of them filled to save.
  - Can access again through Ongoing Requests (Draft)
Making an Initial Request – Access the Saved Request

- Go to the Ongoing Requests tab (the default when you log into the system) to continue working on a request you have saved, but not submitted.
Making an Initial Request – Preview Request

- Checks fields and saves so you can see everything together before submitting the request
- Will provide a note/error message if missing a required piece of information
Making an Initial Request – Preview Request

- From Preview you can:
  - Return to edit and make changes as needed
  - Output to PDF
  - Submit your request for review/approval by the Authorized Signatory (and PI if applicable)
Making an Initial Request – Submit Request

- Request Submitted screen shows who will receive notification e-mails with a link to log in and view request.
- Authorized Signatory and PI will see an Ongoing Request screen similar to yours. If more than one request is waiting, they will see a list.
Making an Initial Request – View Status of Submitted Request

- Go to the Ongoing Requests tab to view the status of the submitted request.
- It is now listed under Submitted Requests (notice that it is “Sent to Authorized Signatory” until it is approved by signatory/PI when it will move to GCO).

![Image of GC70: Anticipation, Expired, or Overdrafted Grant/Fund Request](image-url)

- Ongoing Requests
- Start New Request
- View/Extend Prior Requests

### Draft Requests

<table>
<thead>
<tr>
<th>Org 384 (Chart 1)</th>
<th>Project Information</th>
<th>Type</th>
<th>Status</th>
<th>As Of</th>
<th>PI</th>
<th>Authorized Signatory</th>
<th>Submitted By</th>
</tr>
</thead>
</table>

### Returned Requests

No requests at this time.

### Submitted Requests - Read only

<table>
<thead>
<tr>
<th>Org 241 (Chart 1)</th>
<th>Project Information</th>
<th>Type</th>
<th>Status</th>
<th>As Of</th>
<th>PI</th>
<th>Authorized Signatory</th>
<th>Submitted By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal 00419113</td>
<td>Keithsburg (IL) City</td>
<td>NewAnticipation</td>
<td>Sent to Authorized Signatory</td>
<td>06/08/2016 01:29 PM</td>
<td>Mohan, Kevin</td>
<td>Gregory, Linda</td>
<td>Roessler, Amy</td>
</tr>
</tbody>
</table>
Update Authorized Signatory

- If needed, you can update the Authorized Signatory on a request that he/she has not yet approved (e.g. they are out-of-town/unavailable) by selecting the Submitted Request link.

<table>
<thead>
<tr>
<th>Ongoing Requests</th>
<th>Start New Request</th>
<th>View/Extend Prior Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft Requests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Org 384 (Chart 1)</td>
<td>Proposal 00381685</td>
<td>NSF (Nat Science Fdn)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New/Anticipation Draft Saved</td>
</tr>
</tbody>
</table>

<table>
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<th>Returned Requests</th>
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<tr>
<td>Org 241 (Chart 1)</td>
</tr>
<tr>
<td>Proposal 00419113</td>
</tr>
<tr>
<td>Kriffsburg (IL) City</td>
</tr>
<tr>
<td>New/Anticipation</td>
</tr>
<tr>
<td>Submitted to Authorized Signatory</td>
</tr>
</tbody>
</table>
Update Authorized Signatory

- You will see a field and button to update the Authorized Signatory.
- The new signatory will receive an e-mail notification and link to review the request.
Authorized Signatory / PI Review

- Authorized Signatory will approve (or return)
- If required: PI will approve (or return)
- Status of Ongoing Requests will be updated as each approves/returns
Authorized Signatory / PI Returns Request

- When returning, person returning must provide a reason.
- If both PI and Authorized Signatory are required and one returns, the other will receive an e-mail to let them know they do not need to review at present.
Authorized Signatory / PI Returns Request

- Department Requester will receive an e-mail, including who returned and the return reason
- Department Requester will also see the reason displayed on the returned request
- Department Requester can update request and resubmit or delete
Authorized Signatory / PI Approved Request

- If preaward request, you will first see status that GCO review is awaiting preaward documentation.
- The status is then updated to let you know that Post Award is now processing your request.
- Requests for awarded grants move directly to Under Review by Post-Award.
Grants and Contracts Office (GCO) Review

- When GCO’s review is complete, they will approve/deny the request and provide comments to describe any issues/questions.

- Dept Requester will receive an e-mail with the decision and these comments.

- Grant/Fund setup or updates are made after the GC70 request is processed.

- A separate notification will be sent to let you know the relevant grant/fund information.
View / Extend Prior Requests

- Department Requesters have View/Extend Prior Requests tab
- Can look up by Proposal Reference Number, Grant Code, PI
View / Extend Prior Requests

- You may get multiple results if you search:
  - By PI (all prior requests for that PI)
  - By proposal reference number or grant code (if there have already been extensions for that proposal or grant code)

- Only the most recent version of a prior request may be extended
View / Extend Prior Requests

- To extend an earlier request:
  - Look up the request and select “Extend this Request” button at the bottom
  - Extend will copy the information from request to a new one
  - Make updates and process the same way as original request
View / Extend Prior Requests

- **To extend an earlier request**:  
  - Send the extension through the system the same way you did the original request.
  - Extensions have an indicator in the request and in the notification e-mails alerting you, the approvers, and GCO that it is an extension of an earlier request.
Learning Objectives

- Participants should now be able to:
  - Recognize when to use the online GC70 form
  - Identify features and who will use the system
  - Describe how to request access/permissions to the system
  - Demonstrate how to make an initial request
  - Explain how to view/extend prior requests
Resources

- Online GC70 Form:
  - https://apps.obfs.uillinois.edu/GC70/index.cfm

- Campus Contacts:
  - Chicago: Mee Mee Lee-Choi (meemlee@uillinois.edu)
  - Springfield: Rebecca Jones (rjone1@uillinois.edu)
  - Urbana: Linda Gregory (lagregry@uillinois.edu)
Thank you!