Other Types Award Change Request in Summit Agreements

After a project has been funded, researchers may need to request a change to the award. Instead of emailing a post-award specialist to request a change, researchers should submit an **Award Change Request** (ACR) directly in <u>Summit Agreements</u>.

The award-change-request types that are submitted in the "Other ACR" category include the following:

- Change effort of key VT personnel
- Change in Principal Investigator or Add Co-PI
- Continuation Supplemental funding
- Principal Investigator Transfer

Steps to submit an award change request

- 1. Sign in to <u>Summit Agreements</u>.
- 2. Select **Get Started** in the top-right corner.



3. The **Initiate an Agreement** menu opens. Select the drop-down arrow to expand the selection menu. Choose **Award Change Request (ACR)**.



4. Complete the form by entering text into each required field and select **Submit**.

Provide a brief name that describes the Agre	ement and helps you identify it in the future
describe here	
	272/200
Who is requiring this update or modification	stion?

5. After you select Submit, you will return to the Summit Agreements dashboard and a pop-up instruction box will appear. You will see the instructions pop-up box each time you sign in to Summit Agreements until you submit your request to Office of Sponsored Programs (OSP).

	SUBMIT TO OSP	INSTRUCTIONS	COMMENTS	ALL FILES	ACTIVITY LOG	MORE ACTI
REEMENT INFORM/	INSTRUCTIONS:		;	K	xpand All Agree	ment Pan
GINIA TECH TEAM	Award Change Request (ACR) is used to request a change on a project that has been awarded, such as a no c extension, re-budget, new subfund, transfer between funds, new subaward or another post award action. This be reviewed by OSP until you click the "Submit to OSP" button. Please complete each section as applicable ar documents requested.	cost time request will not nd upload all				
DNSOR / OTHER PA	If you have issues completing your draft, enter a comment in any section of this ACR or email ospawardchang	ge@vt.edu.				
ATED PROPOSALS	Click "X" to close this message. Click the "?" icon at the right top corner to re-open it.					
PRI INTERNAL INFOR	MATION EFD / Sponsor File Location - Not visible to PI and Support staff	Im				

6. Close the Instructions pop-up box and you will see panels on the Summit Agreements dashboard. Select **Agreement Information** by selecting the Agreement Information panel or the right-facing arrow.

	DRAFT				SUBMIT TO OSP
AGR	EEMENT				Expand All Agreement Panels
	> 🔛	AGREEMENT I	FORMATION	1	Agreement Title, OSP Fund Number, Financial Manager, Change Request Details
	• <i>∀</i> 7⁄	⁷ VIRGINIA TECI	I TEAM	I	Investigators, Support Staff
	-	SPONSOR / 01	HER PARTY	1	External Contracting Entity Details and Contact Information
	, b	RELATED PRO	POSALS AND AGREEMENTS	1	Related Proposals and Agreements
	ð G	OVPRI INTERN	AL INFORMATION	I.	EFD / Sponsor File Location - Not visible to PI and Support staff
				[ABANDON DRAFT SUBMIT TO OSP

7. When the Agreement Information panel opens, you will see the text you inputted in step 4. If you need to make changes to the text, select **Edit**. To continue the award change request process, select the **Add Change Request** button.



8. The Add Change Request menu box will open. Select the drop-down arrow to view options and make a selection. Select **Other**.



9. The **Other** dialog box opens. Enter the type and justification for the ACR in the required field. Select **Submit**.

To expedite an ACR, have the following information before beginning the request process in Summit Agreements:

Change effort of key VT personnel

- Effective date of the effort change
- Reason or justification for the
- effort change
- Impact on programmatic work scope

Change in Principal Investigator or add Co-PI

- Justification for the change
- CV for new PI or Co-PI
- Current and Pending for new PI or Co-PI

Continuation/supplemental funding

Summit Proposal Number

Principal investigator transfer

- Last Day of Employment/Effective Date of Transfer
- Will the project stay at Virginia Tech or move with the Principal Investigator (PI) to the new institution?
- Approval letter from Department Head
- If PI is changing, upload CV for new PI
- Add Subaward to PI's new institution
- Revised Virginia Tech budget

Change Request Type	
Other	
ir you do not see the type of request you need in th additional guidance. Additional Details	e drop-down, reference the <u>awaro change kequest page</u> for
	2000 / 2000

10. Once you select submit, you will return to the Summit Agreements Dashboard. Select the **Change Request: Other** panel by selecting the panel or the right facing arrow.

CHANGE REQUEST: SUBAWARD	EDIT Î

11. To complete your request for an ACR, you must upload the required documents. To upload files, select the Add Files Button. The File Upload dialog box opens. Select **Upload Files** to choose files from a folder, or drag and drop files to the upload dialog box. Make sure that your file names match the required names listed in Summit Agreements.

R more than one change	FILE UPLOAD	×	
Uplicad	UPLOAD FILE(S) OR Drag and drop file(s) here		
DUEST: SUBAWARD	CANCEL UPLOAD		

12. When you upload the required files, you will see each listed in the Change Request panel. From the change request panel, you can preview, download, edit, or delete the files.

FILES (6)					ADD FILE	(S)
NAME	LABELS	UPLOADED BY	DATE	SIZE		
Revised VT Budget.> Preview Download	dsx	Nevada G Davis	1/27/2023 9:17am	1.6 MB	1	T
Subrecipient Data SI Preview Download	heet.pdf	Nevada G Davis	1/27/2023 9:18am	1.1 MB	1	W
Subaward Budget.pd Preview Download	df	Nevada G Davis	1/27/2023 9:18am	808.3 kB	1	1
Subrecipient Budget Preview Download	: Justification.pdf	Nevada G Davis	1/27/2023 9:19am	1.1 MB	1	Ŧ
Subaward Statemen Preview Download	t of Work.pdf	Nevada G Davis	1/27/2023 9:20am	808.3 kB	1	Ŵ
Subrecipient Letter of Preview Download	of Inten.pdf	Nevada G Davis	1/27/2023 9:20am	1.1 MB	1	Ŵ

13. If you need to add **additional award change requests** for the **same grant**, you will select **Agreement Information** and select the **Add Change Request** button again. The image below shows the Summit Agreement dashboard if more than one ACR has been requested for the same grant.

COMMENTS (0)	ADD COMMENT
CHANGE REQUEST: NEW SUBFUND	FROM Budget: \$6,348.00 TO Budget: \$6,348.00 Difference: \$0.00
CHANGE REQUEST: SUBAWARD	
VIRGINIA TECH TEAM Investigators, Support Staff	

14. If there are no more additions or revisions to make on your award change request(s), select **Submit to OSP** on the Summit Agreements dashboard.

☆	DRAFT			ACTIVITY LOG MORE ACTIONS
AGREE	MENT		E	xpand All Agreement Panels
>	D	AGREEMENT INFORMATION	Agreement Title, OSP Fund Number, Financial Manager, Change Request Details	
>	V7	VIRGINIA TECH TEAM	Investigators, Support Staff	
•	*2*	SPONSOR / OTHER PARTY	External Contracting Entity Details and Contact Information	
•	ų	RELATED PROPOSALS AND AGREEMENTS	Related Proposals and Agreements	
•	R	OVPRI INTERNAL INFORMATION	EFD / Sponsor File Location - Not visible to PI and Support staff	
			ABANDON DRAFT SUBMIT TO OSP	

15. Once you select **Submit to OSP**, you will receive a verification email and a post-award support specialist will be notified of your request. The support specialist will review your request and contact you if more information is needed. You will receive email notifications when post-award team members add comments to your award change requests. All file uploads and communications concerning your award change request should take place within Summit Agreements.

FILES (0)	ADD FILE(S)
COMMENTS (0)	

16. You can check the status of the award change request in Summit Agreements. Once a post-award support specialist has taken action on your request, you will see a task panel. Select the task panel for more information about the task.

`	***	SPONSOR / OTHER PARTY	External Contracting	Entity Details and Contact Information			
>	ş	RELATED PROPOSALS AND AGREEMENTS	Related Proposals a	nd Agreements			
•	Ø	OVPRI INTERNAL INFORMATION	EFD / Sponsor File L	ocation - Not visible to PI and Support staff			
ТА	SKS					Co	llapse All Task Panels
	•	TUE5GSR7 Grant Management ASSIGNEE Wendy M Jay	In Progress	Waiting on OSP			8
		Initial Comment Checklist	none provided Sponsor Approval Needed Ponsor Approval Received PI Approval Received Budget Reviewed Subaward Documents Reviewed Period of Performance Reviewed		Created By Date Created	Davis, Nevada G. 1/27/2023	
		FILES (0)				ADD FILE(S)	
		COMMENTS (1)				ADD COMMENT	

17. If you have questions or need assistance with an award change request, contact <u>ospawardchange@vt.edu</u>.