

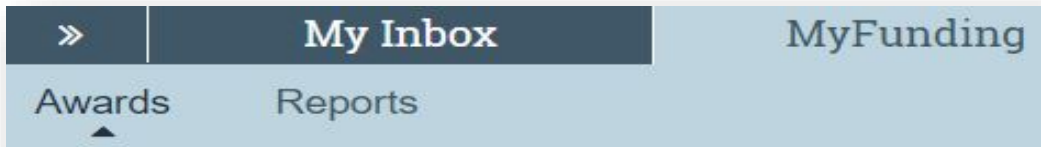
Overview: A ‘Personnel Change’ Amendment/Modification should be requested to change the personnel on a project.

Examples:

1. To change a Principal Investigator (PI) or other key personnel on a project.

Where to Start

1. Log-in to MyFunding and search for the award in the Awards tab:



2. Search for the award in the search box and click on the ‘Name’ of the award:



3. Once in the award workspace click on ‘Request Award Modification’:



4. On the 'Award Modification' page enter the following information:
 - a. Enter a 'Name' for the amendment/modification that includes 'Sponsor Change'
 - b. Enter a 'Description of the Changes' for the amendment/modification request:

Award Modification

Award ID: AWD00000005
Award Name: Smoke Test NM 3 Patch 3/8/19

1. * Name:

2. Description of Changes:

5. Select 'Demographic Change' as the 'Modificaiton Type'
6. Select 'Personnel Change' as the 'Demographic Change'
7. Enter an 'Effective Date' and click 'Continue':

Award Modification
Award ID: AWD00000005
Award Name: Smoke Test NM 3 Patch 3/8/19

1. * Name:

2. Description of Changes:

3. Sponsor's Modification ID: ?

4. * Select Modification Type: ?
 Revision | Supplement
 No Cost Extension
 Re-budget
 Continuation
 NGA Revised
 Budget Allocation Correction
 Demographic Changes Only
[Clear](#)

5. Select demographic changes: ?
 Personnel Change
 Other Changes (T&C, Compliance Update, etc.)

6. * Will this modification affect any Subaward? ?
 Yes No [Clear](#)

7. Effective Date:

Red arrows point to: 'Demographic Changes Only' in step 4, 'Personnel Change' in step 5, and the date field in step 7.

8. On the 'Personnel Changes' page enter the following:
 - a. New 'PD/PI'
 - b. New 'Administrative Contact (Department Administrator)' (if applicable)

Personnel Changes

1. PD/PI change from:
Christine McClure
PD/PI change to:
Eric Larson

2. Administrative contact from:
Christine McClure
Administrative contact to:

- c. Click 'Continue'

9. On the 'Personnel Screen' remove the current 'PD/PI' and update the 'Role' of the new 'PD/PI':

The screenshot shows a 'Personnel' screen with a table of personnel. The table has columns for 'Person', 'Role', 'Role Other', 'Start Date', 'End Date', and 'Remove Row'. The first row is for 'Natalie Metz' with role 'PD/PI' and start date '6/1/2019'. A red arrow points to the 'Remove Row' button for this row. Below the table are several 'Find' buttons and a list of financial accounts.

10. On the 'Completed Award Modification' page click 'Finish':

The screenshot shows the 'Completed Award Modification' page. At the bottom right, there is a 'Finish' button. A red arrow points to this button. The page includes instructions on how to complete the award set-up process.

11. In the modification workspace, click on the 'Parent Award' title to return to the main award workspace:

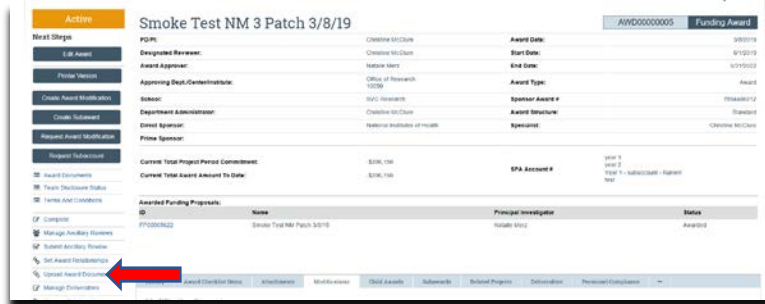
The screenshot shows the 'Personnel Change' modification workspace. At the top, there is a 'Parent Award' title. A red arrow points to this title. The workspace includes a sidebar with 'Next Steps' and 'Draft' buttons, and a main area with fields for 'Parent Award', 'Description', 'PD/PI', and 'Approving Dept./Center/Institute'.

What should be attached by the department (if it was not included with the 'Modification Request')?

1. Any documents requiring a signature by the Office of Research (OR)
2. Any other school-specific required documents
3. NOA/sponsor document noting change (if applicable)
4. Compliance approvals (if applicable)

Where do I attach the documents?

Documents should be attached in the award workspace using the 'Upload Award Documents' activity:

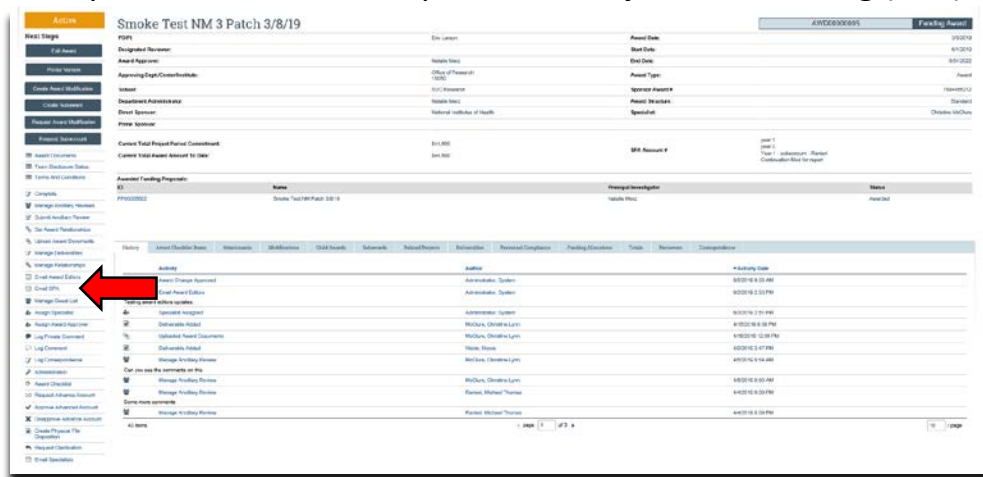


What's Next?

1. If the amendment/modification requires sponsor approval, or is out for signature, the specialist will click 'Send for Sponsor Approval'.
2. Once the amendment/modification is approved/completed the specialist clicks 'Approve' in the modification workspace:



3. In the award workspace the specialist clicks 'Email SPA' to send the required documents to Sponsored Projects Accounting (SPA):



4. The 'Email SPA' activity will open to allow comments and document to be attached to the activity, then click 'Ok' to complete the process:

