Requesting Change of PI/Co-Pi or Senior/Key Personnel in the Grants Portal

The sponsor typically requires the submission of a formal request to change the PI, Co-PI, or Senior/Key Personnel working on the project. The terms and conditions of the award will detail allowability. Sponsors typically require CV and current and pending information and a reason for the change. SPA requires a letter signed by the department head/director justifying the change. If the management unit changes, a new chartstring will be created.

Log in to the Grants Portal using your UGA MyID and Password.

1. Click on the “Projects” link in the red menu bar to search for the specific project that will be modified.

2. Projects that require action, such as approving the transmittal form, are in your “Projects To Do List” at the top of the page. To search for a specific project and initiate a modification request, scroll to the “Projects” section of the page.
3. Click the arrow in the Filter dropdown box to select the available search criteria. You can search in a variety of ways, such as by Project Title, PI, etc. Enter the text to search, and click the “Go” button. If you want to search using multiple filters, click “+Add Filter” and enter additional search parameters.

4. Once the correct project is located, click on the project title. This takes you to the project workspace where you will find the “Request Award Mod” activity.
5. Select the “Request Award Mod” button and you are taken to a new screen.

**Award Name:**

1. *Name of Modification:*

2. **Description of Changes:**

3. *Sponsors Modification ID:*

4. *Modification Event Type:*
   - Pre-Award Spending
   - Pending Award on Future Increments
   - Re-budget, add chart string/s or account code/s
   - Add a Subaward, not anticipated within the proposal
   - Requesting or receiving Additional Funds – Supplements, non-competing continuations, etc.
   - Decrease Award Amount
   - Change in scope of work
   - Change of PI / Co-PI or Senior and Key Personnel
   - PI/Co-PI Disengagement
   - Request to carryover funds from one year to the next
   - Administrative Changes
   - Early Termination
   - No Cost Extension
   - Reports
   - Residual Balance
   - Clear

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**Change PI, Co-PI Key Personnel Request**

1. **Enter change request details:**

<table>
<thead>
<tr>
<th>Persons Name</th>
<th>Leaving Or Joining</th>
<th>Role</th>
<th>Biosketch</th>
<th>Current and Pending</th>
<th>Credit Changes Needed</th>
<th>Credit Comment</th>
</tr>
</thead>
</table>

There are no items to display
Select **Change of PI/Co-PI or Senior and Key Personnel** from the options provided under **Modification Event Type**. This will result in a section where you will provide additional information. Select +Add and a pop-up will open where you will enter specific information.

### Enter Personnel Change Details

1. **Persons Name:**
   
   *Required*

2. **Leaving Or Joining:**
   
   *Required*

3. **Does the Academic Credit or IDC distribution need to change?**

   Describe the change below. The Pre-Award Awarder will contact you for additional details as needed.

   [Text box for description]

   *Required*

* OK  **OK and Add Another**  Cancel

6. Once all the info is entered, select OK and you will go back to the request workspace.

7. Enter remaining information. The effective date is when the change is intended to start. Supporting documents is where you will upload any other documents relevant to the request. This could be updated compliance info, emails, etc. Other Departments, Cost Share Departments, and Over the Cap Departments is where you will provide the department unit numbers, amounts, and chartstring/allocation names associated with the mod.
8. Once you have entered all the required information, click the “OK” button and the request will automatically route to the appropriate Pre-Award Awarder.

9. The award modification request, including attachments and any additional comments provided, will display in the project history.

11. The Project Status will update to “Award Modification Requested” on the Project Workspace and a Pre-Award Awarder will receive notification that a Modification is ready for review and processing.

12. SPA Pre-Award will submit the request to the sponsor, if needed. Once SPA has received Sponsor approval, the modification will be finalized and you will get an email letting you know the process is complete.