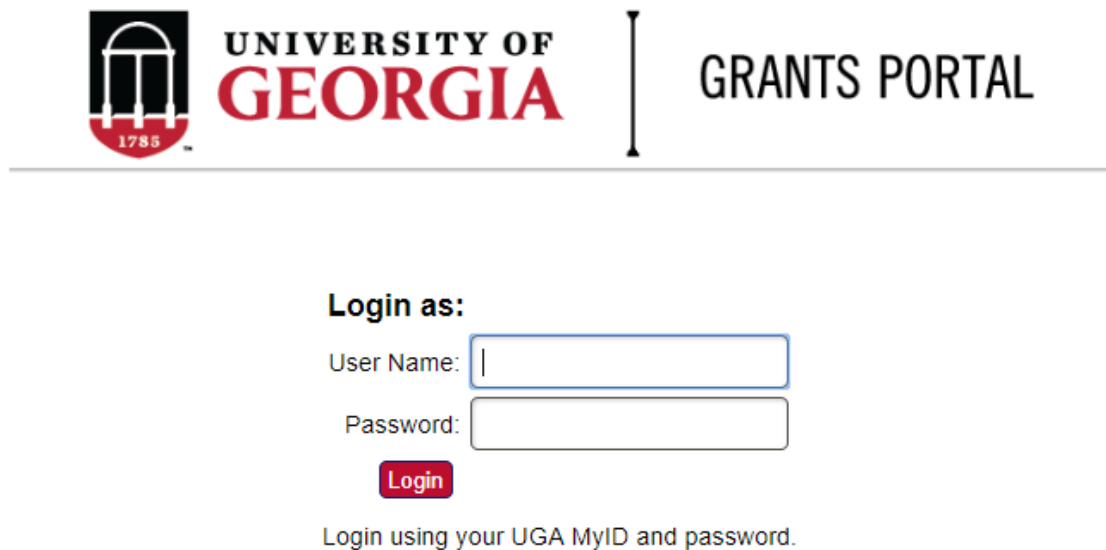


Requesting Carryover Approval for a Sponsored Project in the Grants Portal

Sometimes a sponsored project has budgetary restrictions that prohibit the spending of funds across years. This type of restriction is called carry forward restricted, because it prohibits the carrying forward of a balance from year to year during the life of the project. At award time, Pre-Award Awarders indicate whether an award is carry forward restricted or not by marking the award YES Carry Forward Restricted. If an award is carry forward restricted it doesn't mean you can never carry forward the funds from year to year, but it does mean sponsor permission is required and the sponsor could say no to a carry forward request. Always work with your Pre-Award Awarded to request permission to carry funds forward on a carry forward restricted account. Below is how to ask permission in the Grants Portal.

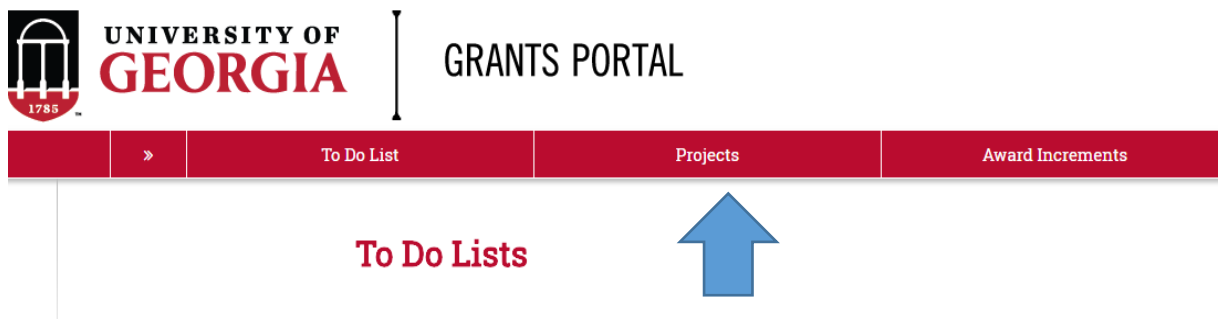
A carryover approval request for a Sponsored Project may be requested via the [Grants Portal](#) using the steps below, or you can contact your [SPA Pre-Award Representative](#) to determine what is needed.

1. Log in to the [Grants Portal](#) using your **UGA MyID** and **Password**.



The screenshot shows the top of the Grants Portal login page. It features the University of Georgia logo (a red shield with a white arch and the year 1785) and the text "UNIVERSITY OF GEORGIA" in red. To the right, separated by a vertical line, is the text "GRANTS PORTAL" in black. Below this is a login section with the text "Login as:" followed by two input fields: "User Name:" and "Password:". Below the password field is a red "Login" button. At the bottom of the login section, it says "Login using your UGA MyID and password."

2. Click on the **"Projects"** link in the red menu bar to search for the specific project that will be modified.



3. 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 down to the **"Projects"** section of the page.

Projects To Do List

Click on the Name or the Action Required to open the project and complete the required action.

Filter

Enter text to search for

Go

+ Add Filter

✕ Clear All

ID	PI	Project Title	State	OSP Rep	IMS Prop #	Action Required	Grants Assistant
FP00012624	test-copi4	test-test	Awarded	test-deptappr11		Approve Transmittal Data as Investigator	test-deptappr16


1 items

◀ page 1 of 1 ▶

10 / page

If you cannot find the project you are looking for in the list below try the Detailed Project Search Page.

Projects

Filter 

ID

▼

Enter text to search for

Go

+ Add Filter

✕ Clear All

ID	Project Title	State	PI	Modified Date	OSP Rep	Primary Sponsor	Application Type	Due Date	IMS#
FP00012624	test-test	Awarded	test-copi4	4/23/2018 2:20 PM	test-deptappr11	GA COMMODITY COMM FOR BEEF	New	7/5/2018	
FP00012566	test award with sub	Award Modification Requested	test-pi1	3/19/2018 9:00 AM	test-deptappr11	NATIONAL INSTITUTES OF HEALTH	New	2/16/2018	

4. 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.

Projects

Filter ?

ID

Enter text to search for

Go

+ Add Filter

✕ Clear All

ID	Project Title State PI Modified Date OSP Rep Primary Sponsor Due Date IMS#	State	PI	Modified Date	OSP Rep	Primary Sponsor	Application Type	Due Date	IMS#
FP00012624		Awarded	test-copi4	4/23/2018 2:20 PM	test-deptappr11	GA COMMODITY COMM FOR BEEF	New	7/5/2018	
FP00012566		Award Modification Requested	test-pi1	3/19/2018 9:00 AM	test-deptappr11	NATIONAL INSTITUTES OF HEALTH	New	2/16/2018	

5. 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.

View Transmittal and Background Info ▼

Federal Application Package ▼

General Actions ▼

Communications ▼

Transmittal Actions ▼

Update Permissions List

test-test
GA COMMODITY COMM FOR BEEF

PI: test-copi4 test-copi4

Initiator: Tammi Childs

Sponsor: GA COMMODITY COMM FOR BEEF

Proposal Start Date: 9/1/2018

Proposal End Date: 8/31/2020

Award Begin Date:

Award End Date:


Request Award Mod

6. Click the “**Request Award Mod**” button and a pop-up appears. Select “Carryover (Carryforward restricted accounts only)” from the options provided under **Modification Type**. Then fill in the boxes according to the red suggestions below:

Request Award Modification

This is a request to the Pre-Award Office and not to the sponsor. It does not guarantee the Modification will be approved. The Pre-Award Office will submit your request if the award is eligible for the modification. If not they will reject your request.

* **Modification Type:**

- 
- ☐ Supplement
 - ☐ No Cost Extension
 - ☐ Re-budget (Sponsor Approval Required)
 - ☐ Non Competing Continuation
 - ☐ Carryover (Carryforward restricted accounts only)
 - ☐ Change in scope of work
 - ☐ Early Termination
 - ☐ Pre-Award Spending
 - ☐ Change of PI / Co-PI
 - ☐ Other Changes

[Clear](#)

Justification For Change:

Typically, sponsors want the following information, but the terms and conditions of the award will determine what is needed.

- Justification for funds remaining
- Details for how funds will be spent in the future
- Detailed budget
- Detailed budget justification
- If the project includes a sub that will also need approval for carryover funds, make sure to get the same info from the sub.

Will this modification affect any Subaward / Subcontract?

☐ Yes ☐ No [Clear](#)

Supporting Documentation:

+ Add

Upload information required to request carryover approval for UGA and any subs

Name	Version	Description
There are no items to display		

Additional Comments:

Information entered here will display in the project history tab of the project workspace.



- Once you have entered all the required information, represented by the red type above, click the “OK” button and the request will automatically route to the appropriate Pre-Award Awarder.
- The award modification request, including attachments and any additional comments provided, will display in the project history.

Project History	Transmittal Data	Franklin College	Award Increments	Permissions	Follow-On Submissions	Versions																	
<div>Filter  Activity  <input type="text" value="Enter text to search for"/> Go + Add Filter ✕ Clear All</div> <table><tr><th>Activity</th><th>Description</th><th>Author</th><th>▼ Activity Date</th></tr><tr><td>Award Modification Requested</td><td>Request creation of an Award Modification</td><td>test-cop14, test-cop14</td><td>5/16/2018 10:18 AM</td></tr><tr><td colspan="4">notes for pre-award awarder</td></tr><tr><td colspan="4">Supplement details</td></tr></table>								Activity	Description	Author	▼ Activity Date	Award Modification Requested	Request creation of an Award Modification	test-cop14, test-cop14	5/16/2018 10:18 AM	notes for pre-award awarder				Supplement details			
Activity	Description	Author	▼ Activity Date																				
Award Modification Requested	Request creation of an Award Modification	test-cop14, test-cop14	5/16/2018 10:18 AM																				
notes for pre-award awarder																							
Supplement details																							

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

How did the zombie outbreak start?

MONSANTO

Project ID#
FP00012640

PI:	test-pi1 test-pi1	Managment Unit:	Savannah River Ecology Lab - (43150000)	Project Status:	Award Modification Requested
Initiator:	test-pi1 test-pi1	DLSA:		PHS FCOI Rules Apply (prime/orig.)	no / no
Sponsor:	MONSANTO	Pre-Award Proposer:	test-deptappr12 test-deptappr12	Total Proposed:	\$156,000
Proposal Start Date:	7/1/2018	Pre-Award Awardee:	MaryAnn Deom	Approvals Status:	Pending

10. SPA Pre-Award will send your request to the sponsor if sponsor approval is required for the change. Once they have the sponsor's approval or if sponsor approval is not required, SPA will process the request and you will get an email letting you know the change has been made. SPA will also alert you if your request is denied by the sponsor or if additional information is required.