

Requesting Residual Balances in the Grants Portal

The University will allow Principal Investigators (PIs) access to residual balances from fixed price sponsored projects in accordance with the policy found [here](#).

A residual balance 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.

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



Login as:

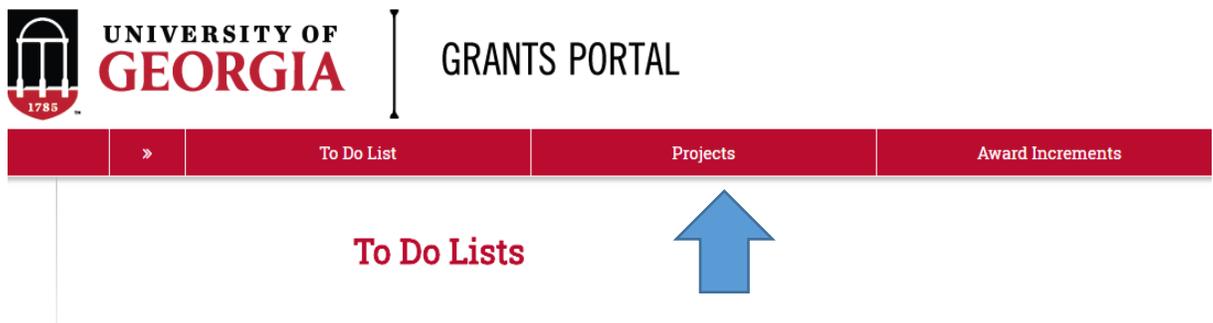
User Name:

Password:

Login

Login 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.

Projects To Do List

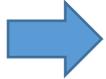
Click on the Name or the Action Required to open the project and complete the required action.

Filter + 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

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



Projects

Filter + 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	

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.

Projects

Filter + 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	

Note: In the original image, a blue arrow points to the 'ID' option in the filter dropdown menu.

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.

test-test

GA COMMODITY COMM FOR BEEF

[View Transmittal and Background Info](#)

[Federal Application Package](#)

[General Actions](#)

[Communications](#)

[Transmittal Actions](#)

[Update Permissions List](#)

[Request Award Mod](#)

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:	

Note: In the original image, a blue arrow points to the 'Request Award Mod' button.

5. Select the “Request Award Mod” button and you are taken to a new screen.

Award Modification Description

Award ID:

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](#)

Residual Balance Request

1. * Attached a signed Residual Balance Request form:

[None]

Select **Residual Balance** from the options provided under **Modification Event Type**. This will result in a section where you will upload a copy of the completed/signed [Residual Balance Request form](#).

- 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.

5. * **Effective Date:**



6. **Supporting Documents:**

Name	Description
There are no items to display	

7. **Other Departments:**

Other Unit	Ar
There are no items to display	

8. **Cost Share Departments:**

Cost Share Unit
There are no items to display

9. **Over The Cap Departments:**

Over The Cap Unit
There are no items to display

- Once you have entered all the required information, 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												
<p>Filter <input type="text" value="Activity"/> <input type="text" value="Enter text to search for"/> <input type="button" value="Go"/> <input type="button" value="+ Add Filter"/> <input type="button" value="x Clear All"/></p> <table border="1"> <thead> <tr> <th>Activity</th> <th>Description</th> <th>Author</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr> <td>Award Modification Requested</td> <td>Request creation of an Award Modification</td> <td>test-copi4, test-copi4</td> <td>5/16/2018 10:18 AM</td> </tr> <tr> <td colspan="4"> notes for pre-award awarder Supplement details </td> </tr> </tbody> </table>							Activity	Description	Author	Activity Date	Award Modification Requested	Request creation of an Award Modification	test-copi4, test-copi4	5/16/2018 10:18 AM	notes for pre-award awarder Supplement details			
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- 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.
- Once SPA has submitted or verified the submission of the reports, the modification will be finalized and you will get an email letting you know the process is complete.