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.

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 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

Residual Balance Request

1. **Attached a signed Residual Balance Request form:**
   [None]  Upload
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**.

6. 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.

7. Once you have entered all the required information, click the “**OK**” button and the request will automatically route to the appropriate Pre-Award Awardee.

8. 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 Awardee will receive notification that a Modification is ready for review and processing.

12. 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.