Change of Institution during Prefunding

Notice of Institution Change

- Use the Object Email to capture the thread of the change of institution request. Include the PI's request, the old institution's acknowledgement to release the award, and the new institution's acknowledgement to accept the award.

PI Task: The PI should create a profile at his/her new institution. (Staff can do this, if necessary.)

RGPO Staff Tasks

- Create a Change of Institution activity: Activity List > Other Activities. Click [+], select Change of Institution from the dropdown list. Click Save.
    - **Note**: Because the grant is still in prefunding and funds have not been released, there is no need for an Early Termination activity and no need to create a new grant.
    - Paste the grant ID into the original grant id field. (The grant ID will not change.)
    - Upload the institution acknowledgement letters. Click Save Draft and Submit to PO.
- Update the grant file:
    - General Tab: Change the PI by selecting the PI's new profile. Change the institution to the new institution
    - Contacts: Remove all the institution contacts for the former institution
    - Activity List: Check the Deliverables, Assurances, and Other Activities tabs. Verify that these deliverables are relevant to the new institution. Delete if unneeded. If needed, then update the Owner to the PI's new profile.
    - Budget: On the System tab, change the Budget owner to the PI's new profile. On the contact list of the budget, remove the old PI profile as the "Submitting PI" and add the PI's new profile as the "Submitting PI".
- Change the grant status to "Full Application Draft" (use batch update).

PI Task

- Update the Budget
- Update the Institution Contacts on the Budget activity
- Update Key Personnel, Assurances, and Documentation as necessary
- Update the signature page and submit to the signing official

Institution Signing Official Task: Review, sign, and submit the application to RGPO

PO Task

- Review the Change of Institution activity. Approve if approvable. If changes are needed, add a comment and click Return to C&G.
- Review the submitted application.
- Set the grant status to "Selected for Funding" (use batch update).

At this point, the grant follows the standard pre-funding workflow process. The grant file should be reviewed more extensively than a typical grant: Assurances, Research Aims, Project Scope, Programmatic review of the budget, Personnel, Milestones, etc.

- Update the "Grant Approval Tab" to include the Original Approved Amounts and Approved Amounts. Set the start date, and end dates
- Approve Budget after it has been reviewed and verified

- Check that contacts have been updated
- Check assurance uploads, deliverable uploads and documentation uploads
- If applicable, process grant agreement and upload to grant agreement activity
- Process Award Notices and upload to the "Grant Approval Tab"
- Set Payments via Activity List
- Ensure Reports are updated via Activity List
- Request approval process with C&G, PO and GBFA by marking the comments "Approved" – update checklists
- Once approved, it will then go through the director approval process.
- Payments Process Continues via GBFA
- PO Marks Grant "Awarded"

Final Step: C&G merge the PI's profiles (after data migration).