

New Subfund

Award Change Request in Summit Agreements

After a project has been funded, researchers may need to request a change to the award. Instead of emailing a post-award specialist to request a change, researchers should submit an **Award Change Request (ACR)** directly in [Summit Agreements](#). To request a **new subfund**, follow the steps below:

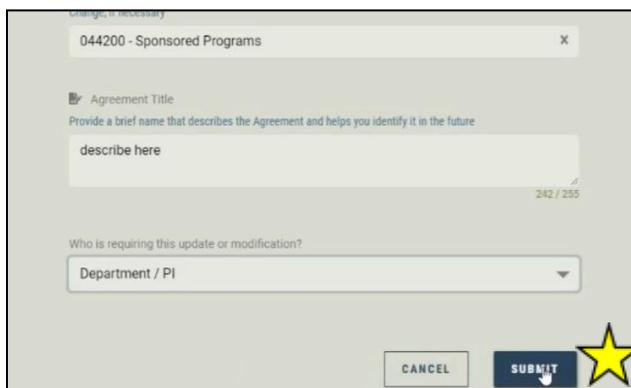
1. Sign in to [Summit Agreements](#).
2. Select **Get Started** in the top-right corner.



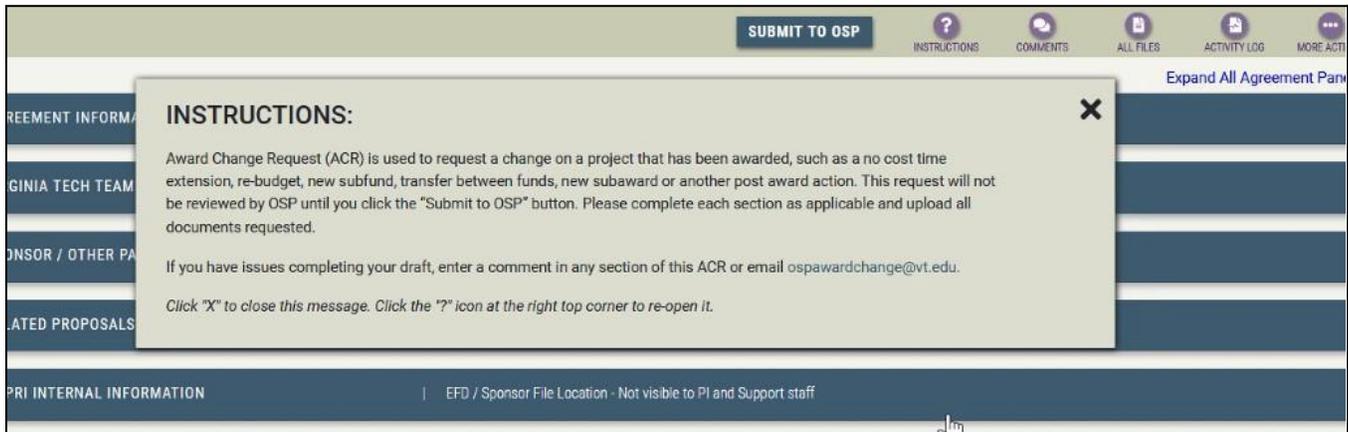
3. The **Initiate an Agreement** menu opens. Select the drop-down arrow to expand the selection menu. Choose **Award Change Request (ACR)**.



4. Complete the form by entering text into each required field and select **Submit**.

A screenshot of the award change request form. At the top, it shows '044200 - Sponsored Programs' with a close button. Below is the 'Agreement Title' field with a placeholder 'describe here' and a character count '242 / 255'. Underneath is a dropdown menu for 'Who is requiring this update or modification?' with the selected option 'Department / PI'. At the bottom, there are 'CANCEL' and 'SUBMIT' buttons. A yellow star is placed over the 'SUBMIT' button.

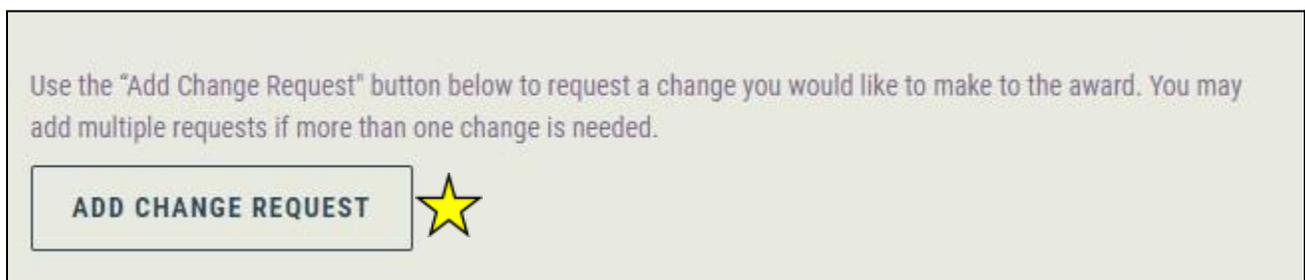
- After you select Submit, you will return to the Summit Agreements dashboard and a pop-up instruction box will appear. You will see the instructions pop-up box each time you sign in to Summit Agreements until you submit your request to the Office of Sponsored Programs (OSP).



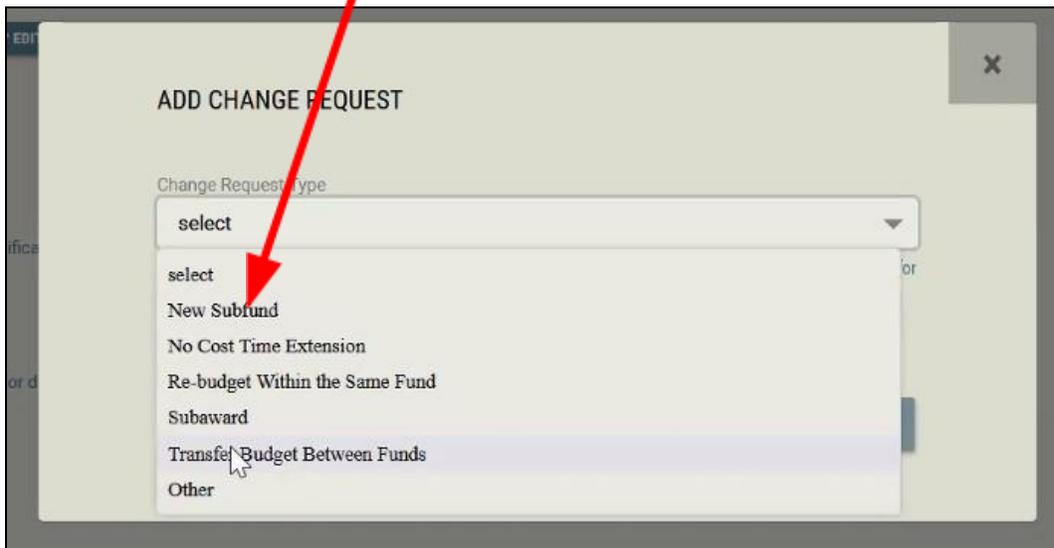
- Close the Instructions pop-up box and you will see panels on the Summit Agreements dashboard. Select **Agreement Information** by selecting the Agreement Information panel or the right-facing arrow.



- When the Agreement Information panel opens, you will see the text you inputted in step 4. If you need to make changes to the text, select **Edit**. To continue the award change request process, select the **Add Change Request** button.



- The Add Change Request menu box will open. Select the drop-down arrow to view options and make a selection. Select **New Subfund**.



- The **New Subfund** dialog box opens. Input text into each entry box. After all fields are filled, select **Submit**.

For a new subfund, you will input the following information:

- Justification for the new subfund
- New subfund name
- New subfund start date
- New subfund end date
- New subfund financial manager
- New subfund organization
- Budget for the new subfund
 - account code(s) or account description
 - amount
- Re-allocations for the new subfund
 - fund number
 - account code(s) or account description
 - amount

A screenshot of the "ADD CHANGE REQUEST" dialog box. The "Change Request Type" dropdown is set to "New Subfund". Below the dropdown is a small text note: "If you do not see the type of request you need in the drop-down, reference the [Award Change Request page](#) for additional guidance." The dialog contains several input fields: "Justification for the request for a new subfund" (a large text area with a character count of 2000 / 2000), "Title of the new subfund" (a text field with a character count of 255 / 255), "Subfund Start Date" (a date picker field showing "mm/dd/yyyy"), "Subfund End Date" (a date picker field showing "mm/dd/yyyy"), "Subfund Financial Manager" (a search field with the placeholder "Search by name, PID, or 9-number"), and "Subfund Organization" (a text field with the placeholder "Autofill").

- After you select Submit on the **New Subfund** dialog box, you will return to the Summit Agreements dashboard. In the Agreement Information panel, you will see the Change Request panel.



11. When you select the **Change Request: New Subfund** panel, you can review your input and select **Edit** if you need to make changes.

Category	Change
112 - Salary	no change no change
1123A - Staff SA	no change no change
1126A - CY Fac SA	no change no change
114 - Wage	-4,480.00 +4,480.00
111 - Fringes	-368.00 +368.00
220 - Equipment	no change no change
140 - Awards	no change no change
128 - Travel	-1,000.00 +1,000.00
130 - Supplies	-500.00 +500.00
120 - Contractual Services	no change no change
150 - Continuous Charges	no change no change
190 - Subcontract	no change no change
OH1 - Indirect	no change no change
OH2 - Institutional Allowance	no change no change
OH3 - Admin Fee	no change no change

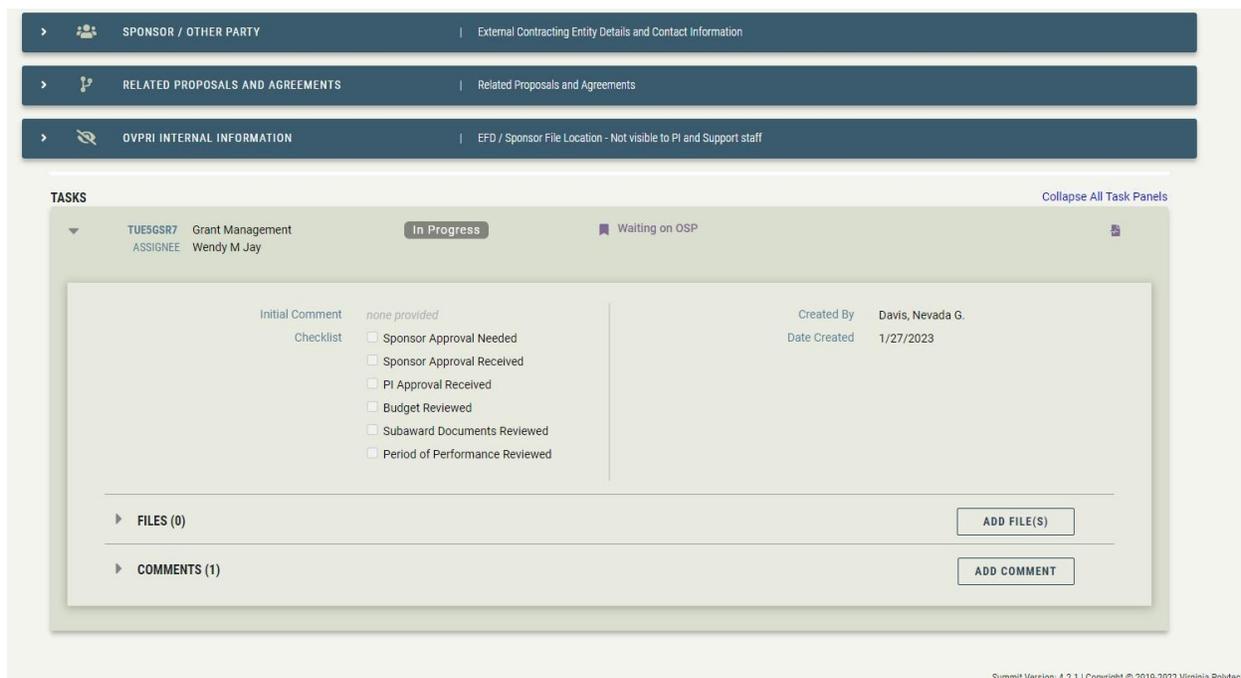
12. If you need to add **additional award change requests** for the **same grant**, you will select **Agreement Information** and select the **Add Change Request** button again. The image below shows the Summit Agreement dashboard if more than one ACR has been requested for the same grant.

13. If there are no more additions or revisions to make on your award change request(s), select **Submit to OSP** on the Summit Agreements dashboard.

- Once you select **Submit to OSP**, you will receive a verification email and a post-award support specialist will be notified of your request. The support specialist will review your request and contact you if more information is needed. You will receive email notifications when post-award team members add comments to your award change requests. All file uploads and communications concerning your award change request should take place within Summit Agreements.



- You can check the status of the award change request in Summit Agreements. Once a post-award support specialist has taken action on your request, you will see a task panel. Select the task panel for more information about the task.



- If you have questions or need assistance with an award change request, contact ospawardchange@vt.edu.