Transfer Budget Between Funds
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 to **transfer budget between funds**, follow the steps below:
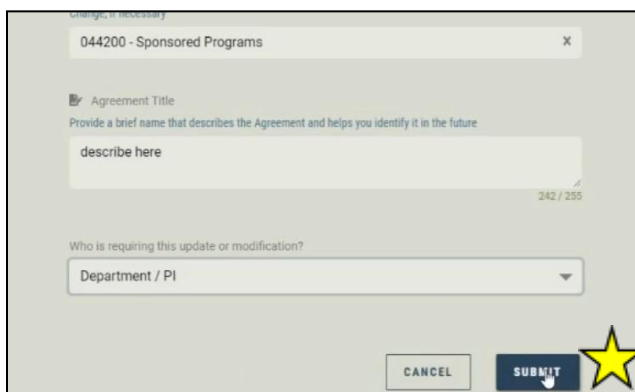
1. Sign in to Summit Agreements.

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**.

5. 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 Office of Sponsored Programs (OSP).
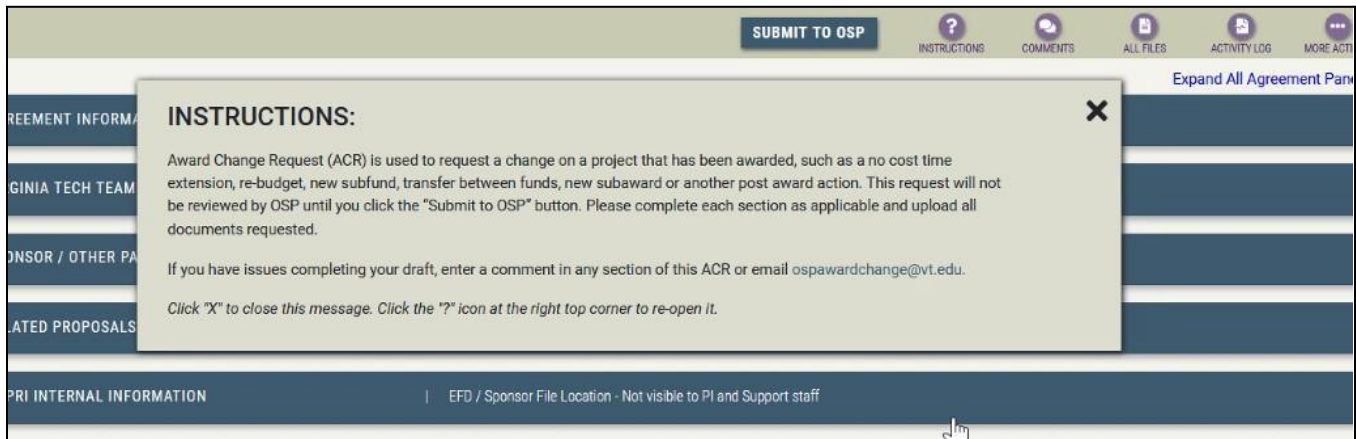

6. Close the Instructions pop-up box and you will see panels on the Summit Agreements dashboard. Select **Agreement Information** by selecting the Agreement Information panel or the right-facing arrow.
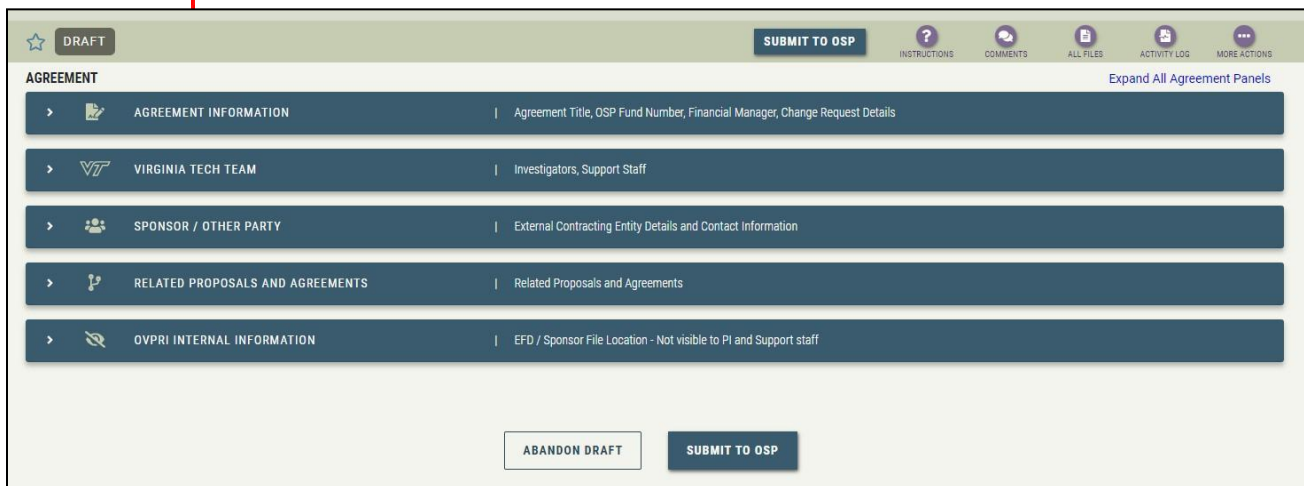
7. When the Agreement Information panel opens, you will see the text you inputted in step 4. If you need to make changes to the text, select **Edit**. To continue the award change request process, select the **Add Change Request** button.

8. The Add Change Request menu box will open. Select the drop-down arrow to view options and make a selection. Select **Transfer Budget Between Funds**.
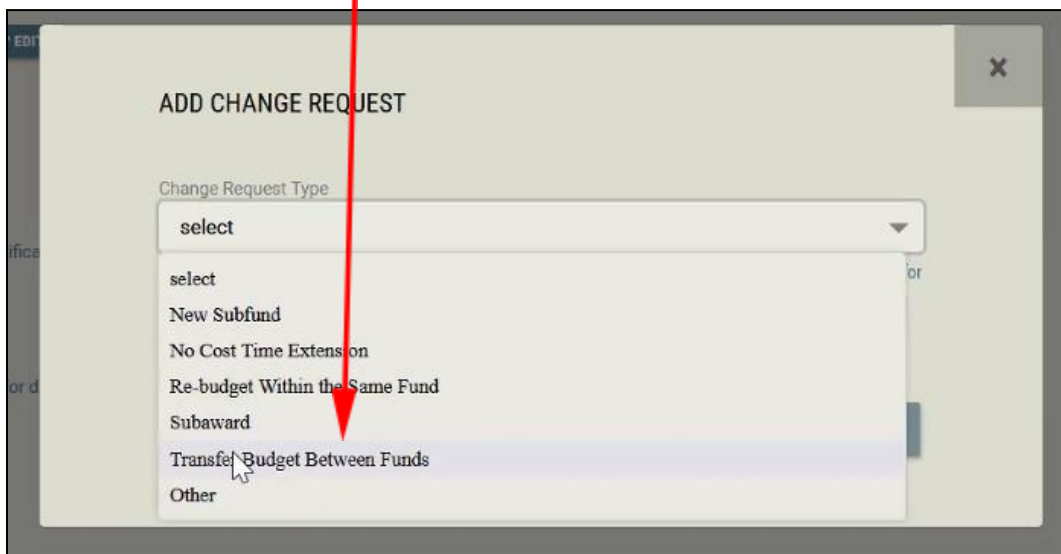
9. The **Transfer Budget Between Funds** dialog box opens. Input text into each entry box. After all fields are filled, select **Submit**.

To transfer budget between funds, you will input the following information:
- Justification for the request for transfer of budget between funds
- Budget transferring FROM—fund, account code(s) or account description, amount
- Budget transferring TO—fund, account code(s) or account description, amount

10. After you select Submit on the **Transfer Budget Between Funds** dialog box, you will return to the Summit Agreements dashboard. In the Agreement Information panel, you will see the Change Request panel.
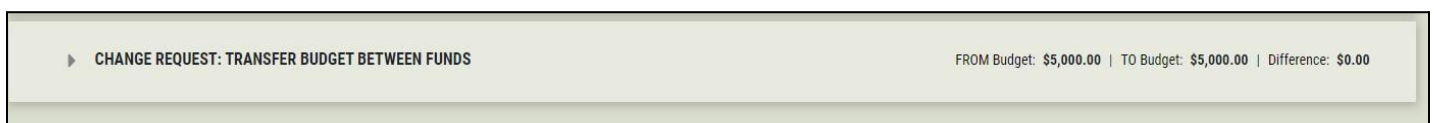
11. When you select the **Change Request: Transfer Budget Between Funds** panel, you can review your input and select **Edit** if you need to make changes.
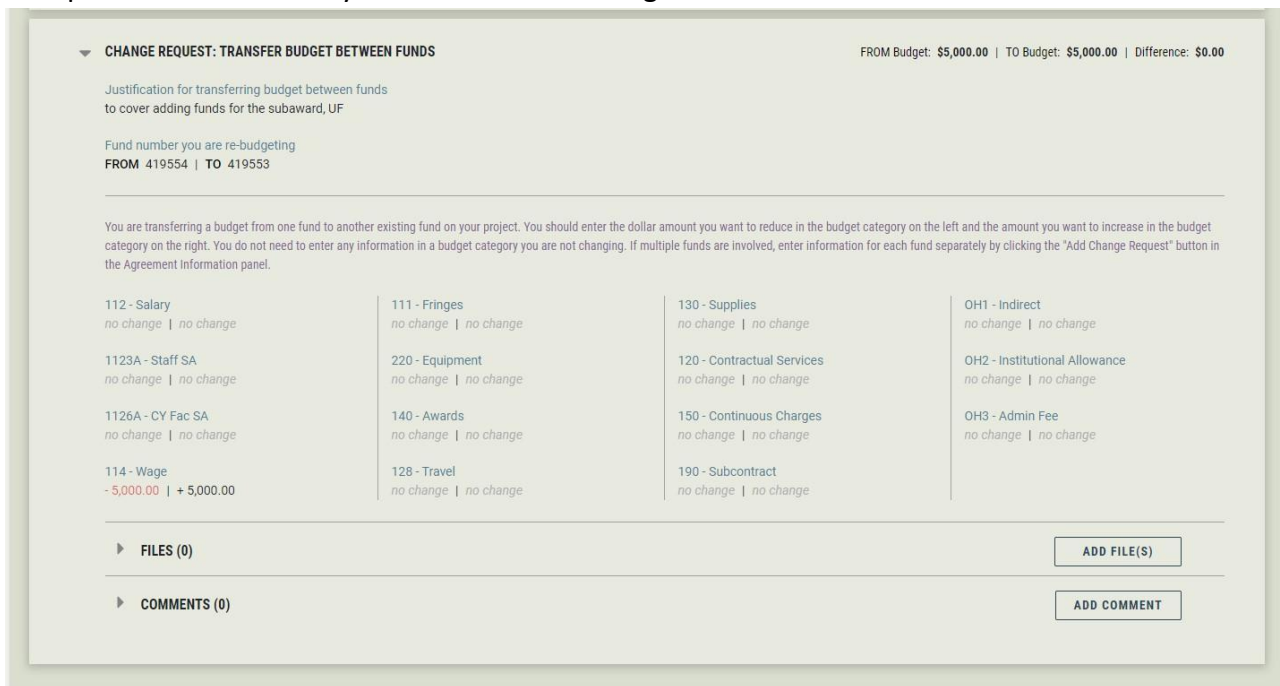
12. If you need to add **additional award change requests** for the **same grant**, you will select **Agreement Information** and select the **Add Change Request** button again. The image below shows the Summit Agreement dashboard if more than one ACR has been requested for the same grant.


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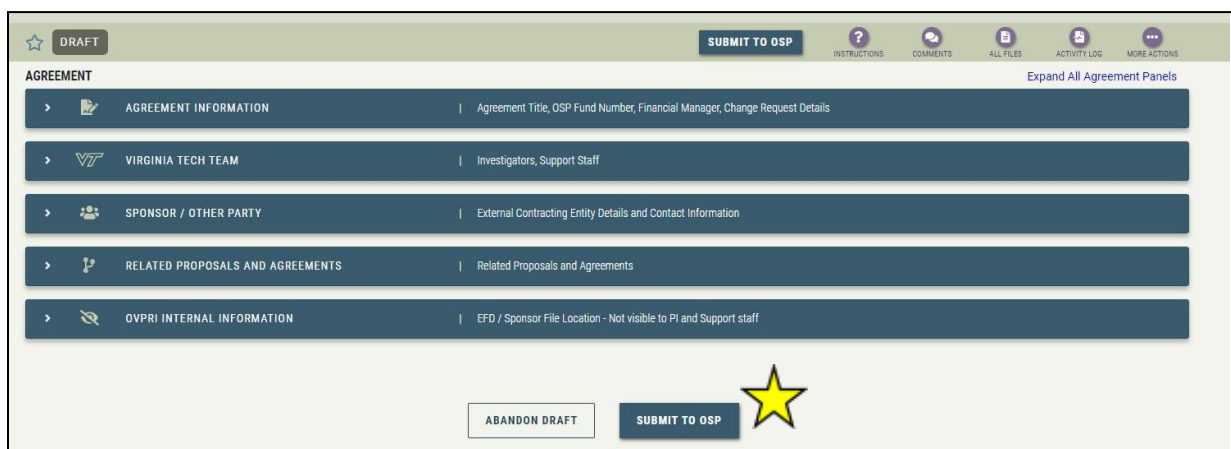
14. Once you select **Submit to OSP**, you will receive a verification email and a post-award support specialist will be notified of your request. The support specialist will review your request and contact you if more information is needed. You will receive email notifications when post-award team members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

15. 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.
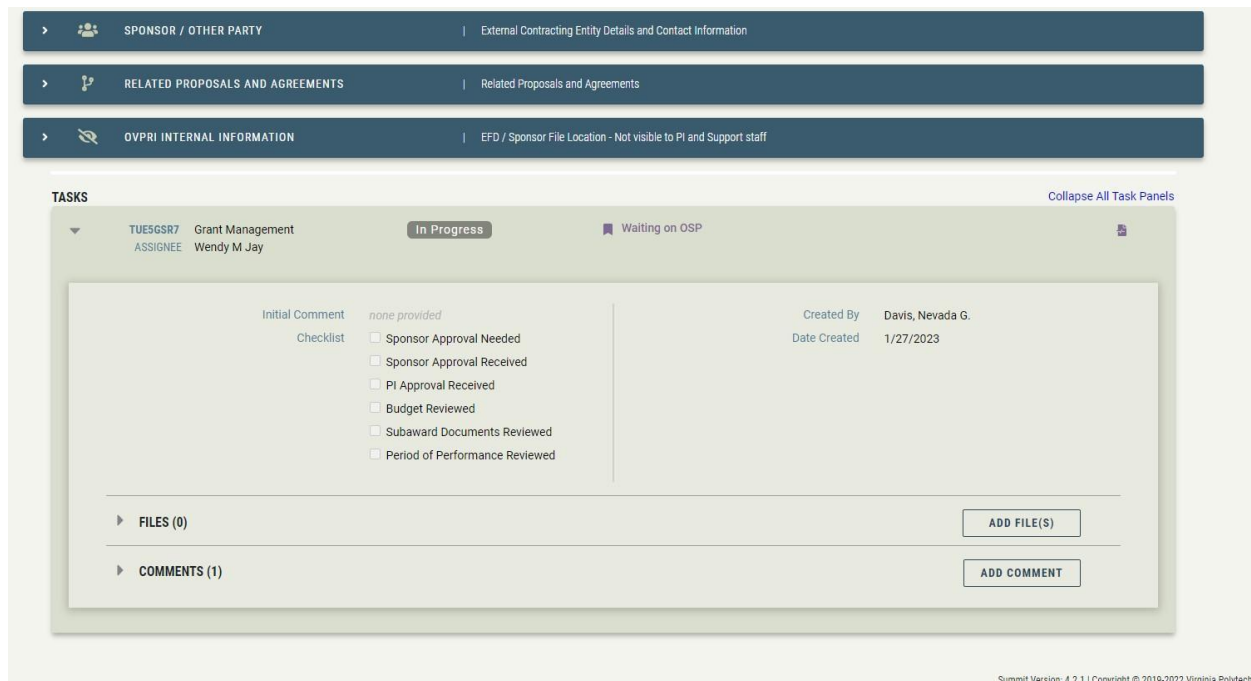
16. If you have questions or need assistance with an award change request, contact ospawardchange@vt.edu.