

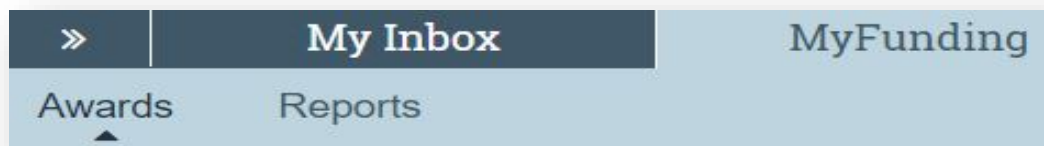
**Overview:** A 'Carryover' amendment/modification should be requested to move funds from one budget period to another budget period.

**Examples:**

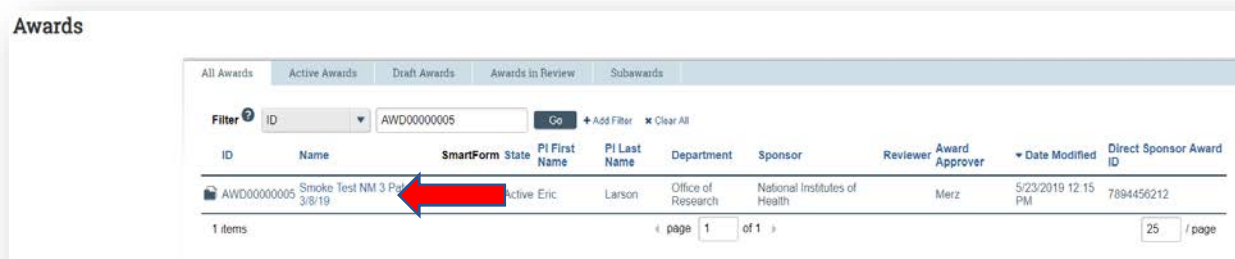
1. The Notice of Award (NOA) allows for automatic carryover. Period 1 has \$100,000 remaining due to staff vacancies and needs moved to period 2.
2. Period 1 has \$100,000 remaining due to staff vacancies and has been approved by the sponsor to move into period 2.

**Where to Start**

1. Log-in to MyFunding and search for the award in the Awards tab:



2. Search for the award in the search box and click on the 'Name' of the award:



3. Once in the award workspace click on 'Request Award Modification':

The screenshot shows the 'Active' workspace for 'Smoke Test NM 3 Patch 3/8/19'. On the left, under 'Next Steps', the 'Request Award Modification' button is highlighted with a red arrow. The main area displays award details in a table format.

Award Details		AWD00000005	Funding Award
PD/PI:	Eric Larson	Award Date:	3/8/2019
Designated Reviewer:		Start Date:	6/1/2019
Award Approver:	Natalie Merz	End Date:	5/31/2022
Approving Dept./Center/Institute:	Office of Research 10050	Award Type:	Award
School:	SVC Research	Sponsor Award #	7894456212
Department Administrator:	Natalie Merz	Award Structure:	Standard
Direct Sponsor:	National Institutes of Health	Specialist:	Christine McClure
Current Total Project Period Commitment:	\$22,600	SPA Account #	year 1 year 2 Year 1 - subaccount - Ranieri test
Current Total Award Amount To Date:	\$22,600		
Awarded Funding Proposals:			

4. On the 'Request Details' page enter the following information:

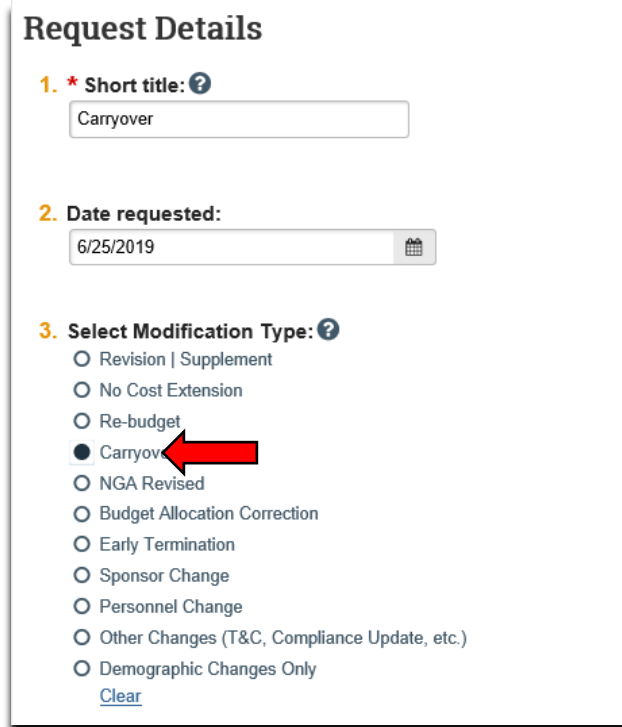
- a. Enter a 'Short Title' for the amendment/modification that includes 'Carryover':

The 'Request Details' form shows the first step: 'Short title: ?'. The text input field contains 'Carryover'.

- b. Enter a 'Date requested' for the amendment/modification request:

The 'Request Details' form shows the second step: 'Date requested:'. The date input field contains '6/25/2019'.

c. Select 'Carryover' as the 'Modification Type':



**Request Details**

1. **\* Short title:**

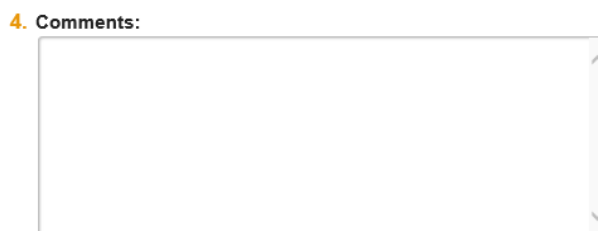
2. **Date requested:**

3. **Select Modification Type:**

- ☐ Revision | Supplement
- ☐ No Cost Extension
- ☐ Re-budget
- ☒ Carryover
- ☐ NGA Revised
- ☐ Budget Allocation Correction
- ☐ Early Termination
- ☐ Sponsor Change
- ☐ Personnel Change
- ☐ Other Changes (T&C, Compliance Update, etc.)
- ☐ Demographic Changes Only


[Clear](#)

d. Enter a description of the request in the 'Comments' box:



4. **Comments:**

5. Click 'Finish' in the bottom right-hand corner:



4. **Comments:**

5. **Supporting Documents:**

[+ Add](#)

There are no items to display

[Back](#) [Save](#) [Print](#) [Finish](#)

6. Click 'Assign Submitter'. Assign the submitter as **your Dean's area reviewer** and select 'OK':

The screenshot shows a web interface for a 'Carryover' modification request. The top bar includes a 'Draft' button and a 'Modification Request' status. The main form area displays 'Submitted By: System Administrator', 'Specialist: Guy Serrapere', 'Request Date: 6/25/2019', and 'Award: AWD00000005 (AWD00000005)'. A left sidebar contains a 'Print Version' link and a list of actions: 'Submit to Specialist', 'Withdraw', 'Copy', 'Assign Submitter' (highlighted with a red arrow), 'Assign Specialist', 'Log Comment', 'Administration', and 'Assign Submitter'.

The screenshot shows a 'MyFinding' dialog box titled 'Assign Submitter'. It contains a list of submitters with 'Jennifer Woodward' selected. The dialog has 'OK' and 'Cancel' buttons.

### What do I attach?

1. Any documents requiring a signature by the Office of Research (OR)
2. Any other school-specific required documents
3. NOA/sponsor document noting change (if applicable)
4. A Budget Modification Request (BMR) for Sponsored Projects Accounting (SPA)
5. Compliance approvals (if applicable)

## Where do I attach the documents?

Documents should be attached in the award workspace using the 'Upload Award Documents' activity:

Active | Smoke Test NM 3 Patch 3/8/19 | AWD00000005 | Funding Award

Next Steps: Edit Award, Print Version, Create Award Modification, Create Subaward, Request Award Modification, Request Subaward.

Search Documents, Track Document Status, Terms And Conditions.

Compliance: Manage Activity Review, Submit Activity Review, Upload Award Document, Manage Attachments.

Current Project Period Commitment: \$200,000 | Current Total Award Amount To Date: \$200,000 | SPA Account #

Awarded Funding Proposals:

ID	Name	Principal Investigator	Status
PT00000002	Smoke Test NM Patch 3/8/19	Christine Lynn	Approved

Attachments | Modifications | Subawards | Related Projects | Submissions | Previous Compliance

## What's Next?

1. The Dean's area reviewer will review the amendment/modification request and if acceptable, will use the 'Submit to Specialist' activity in the amendment/modification workspace to send the amendment/modification request to the Office of Research (OR).

Draft | Testing In box | AMR00000413 | Modification Request

Submitted By: Natalie Merz | Request Date: 4/3/2019 | Specialist: Zachary Byrnes | Award: AWD00000005 (AWD00000005)

Print Version | Submit to Specialist | Withdraw | Copy | Assign Specialist | Log Comment

Activity | Author | Activity Date

Submitter Assigned	McClure, Christine Lynn	4/5/2019 11:47 AM
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2. If accepted by the OR, the amendment/modification request will be "Approved", and the OR will create the amendment/modification for the award and send the required documents to Sponsored Programs Accounting (SPA) to have the SPA account updated.