

Initiating an internal or change request

This document provides an overview of how to initiate an internal or change request in GMAS. The first section provides general steps applicable to all internal/change requests; the remainder of the document describes steps for each kind of internal/change request.

Steps

1. Navigate to the segment home page for the proposal/award.
2. Click **Actions**, and then **Create request**.
3. In the pop-up modal, answer the question “Is this a retroactive request?”, then choose the appropriate request category and type(s). Requests can be bundled within their respective categories (**Changes to existing segment** or **Internal requests**) but cannot be bundled across the two different categories of request types.

Changes to existing segment requests:

Requests in the new GMAS interface

- [Pre-award expenditure](#)
- [Carryforward](#)
- [No-cost extension](#)
- [Subrecipient addition](#)
- [Interfaculty addition](#)
- [Early termination](#)

Requests in the old GMAS interface

- [Change of PI](#)
- [Equipment rebudget](#)
- [Rebudget restricted categories](#)

Internal requests:

Requests in the old GMAS interface

- [At-risk accounts](#)
- [Change tub or org](#)
- [New accounts](#)

4. Click **Create request**.

If the request(s) that was selected has been updated to the new GMAS interface, you will be taken to a new GMAS screen request homepage. From there you will have a list of actions required related to the request type(s) selected that must be completed before the request can move forward in the workflow. In addition to the actions required, approvals, submission requirements, and accounts can be added or updated, if necessary, as part of the request.

Actions required include:

- Subrecipient(s) missing
- No-cost extension information is missing
- Carryforward information is missing
- Early termination information is missing
- Pre-award expenditure information is missing
- Justification is missing

If any of the requests that were selected have not been updated to the new GMAS interface (Change of PI, Equipment rebudget, Rebudget restricted categories, At-risk accounts, Change tub or org, and New

accounts), you will be taken to an old GMAS request screen requiring entry of a justification before being brought to the request homepage. In addition to completing the request related actions, approvals, submission requirements, and accounts can be added or updated, if necessary, as part of the request.

5. Once all actions required are complete/all request related data has been entered (see sections below for what is needed for each request type) and supporting documents have been uploaded into the requests document repository, select **Lock and Route for Signatures** and confirm/update signatories to route the request for signatures and submission to sponsor (if approval is required) or processing of an action memo (if internal action).

Request details

Subrecipient Addition

1. Adding subrecipient records can be done from the “Subrecipient(s) missing” action required **Edit** button, and from the subrecipients panel **Add** button on the request home if you are in the new GMAS interface. If the request was bundled with another request type that is not yet supported in the new GMAS interface (Change of PI, Equipment rebudget, Rebudget restricted categories) then adding subrecipient records can be done by selecting the **Subagreements** link from the panel towards the bottom of the request screen and then selecting the **Create subrecipient** button from the Subrecipients list screen.
2. Enter information about the subrecipient. You must minimally enter the subrecipient organization, subrecipient PI, subrecipient start and end dates (these will prepopulate as the segment dates but can be updated).
3. Once done, if more subrecipient records need to be added you can do so from the subrecipient panel, or the subrecipient list screen.

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No-cost extension

1. Adding the new project end date can be done from the “No-cost extension information is missing” action required **Edit** button, and from the no-cost extension panel **Edit** button on the request home.
2. When entering a **No-cost extension**, enter the Proposed new end date.
3. An **Approximate remaining balance** will default in based on what the current remaining balance is but can be changed if it should be different.
4. Once complete click **Done**.

Edit no-cost extension information



Current segment end date

Dec 7, 2024

Proposed new end date

Current remaining balance

\$0

Approximate remaining balance

Cancel

Done

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Carryforward Requests

Carryforward requests cannot be bundled with requests that are not in the new GMAS interface.

1. Adding carryforward can be done from the “Carryforward information is missing” action required **Edit** button, and from the carryforward panel **Edit** button on the request home.
2. When entering **Carryforward**, if there are multiple segments related to the project, you will need to select the segment that the carryforward is coming from (this field will default to the segment the request is being built in but can be changed to a prior segment). If there is only one segment on the project this step is not applicable.
3. Select the period the money will be coming from. If there are multiple segments and/or periods that money is coming from, select “Add new period” to identify more periods and amounts.
4. Select the date the total carryforward amount will be moved into by using the dropdown in the **To period** field, and then click **Done**.

Edit carryforward information
✕

Carryforward from

Which segment is the carryforward from?
03 - Jan 5, 2032-Dec 5, 2034

From period
Please select a period

Estimated carryforward amount
\$0.00

Which segment is the carryforward from?
03 - Jan 5, 2032-Dec 5, 2034

From period
Please select a period

Estimated carryforward amount
\$0.00

+ Add new period

Carryforward to

To period

Total estimated carryforward amount
\$0

Cancel Done

Note: At this time the following 'Changes to existing segment' type requests cannot be bundled together: Carryforward together with Rebudget restricted categories, Equipment rebudget, and/or Change PI requests. GMAS is undergoing improvements to allow these request types to be bundled again in an upcoming release.

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Interfaculty involvement

1. Adding interfaculty involvement information can be done from the interfaculty involvement panel **Edit** button on the request home.
2. Enter the org where the interfaculty member is from.
3. Look up the interfaculty involvement principal investigator and indicate whether they should be added to the research team as well. If adding to the research team, select the most appropriate role description in the dropdown.
4. Start and end dates will prepopulate from segment dates but can be updated if necessary.
5. Identify any interfaculty involvement department administrators that will need part-of access to the project to support their interfaculty PI. GMAS will recommend which department administrators should be on the team with a prepopulated checkmark based on current security set up for that interfaculty department, but that can be changed.

If someone is not appearing in the prepopulated list, you can search for another individual that should be given access to support the interfaculty PI.

6. If more interfaculty involvement needs to be added to the segment, select **Add interfaculty involvement**. Repeat steps 2-6 and when finished click **Done**.
7. New account shells are automatically created for the interfaculty PI. These can be viewed and/or edited in the **Accounts** component.

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Early termination

1. Adding early termination information can be done from the “Early termination information is missing” action required **Edit** button, and from the termination panel **Edit** button on the request home.
2. Enter the **New end date** of the award, and then click **Done**.

Edit early termination information



New end date

01/17/2024

Cancel

Done

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Pre-award expenditures

1. Adding the pre-award expenditure information can be done from the “Pre-award expenditure information is missing” action required **Edit** button, and from the pre-award expenditure panel **Edit** button on the request home.
2. When entering a **No-cost extension**, enter the Proposed new end date.
3. When entering **Pre-award expenditures**, the Pre-award start date will default to three months prior to the current segment start date. If the Pre-award start date should be different, it can be changed.
4. Enter the **Direct cost amount** and the **Associated indirect cost amount** to be spent during the pre-award period, then click **Done**.

Edit pre-award expenditure information



Pre-award start date 06/01/2022

Direct cost amount \$

Associated indirect cost amount \$

Cancel Done

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Change of PI and/or managing department/school

The same **Change of PI/Tub/Org** panel is available from the “Change PI” and “Change tub/org” request types.

1. Click **Edit** in the **Change of PI/Tub/Org** panel.
2. If processing a change PI request, look up the **new PI** and identify the **date** they will take over the project.
3. If processing a change tub/org request enter the **new org** (the tub will default based on org selected) and select the **date** the new org will take over the management of the award.
4. Select **OK** button.

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Equipment rebudget

1. Click **Edit** in the **Equipment** panel.
2. Enter the **Vendor, Equipment to be purchased** and the **Price**.
3. Use the **Re-budget** component if funds need to be transferred between accounts.
4. Upload any pricing quotes or other documentation to **Documents**.

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Re-budget

If new accounts are needed, they can be added from the **Accounts** panel.

1. Click **Edit** in the **Re-budget** panel.
2. Enter the **Amount** to be rebudgeted.
3. In the first column, select the Account from which the amount will be taken and the Object code.
4. In the second column, select the Account to which the amount will be added and the Object code.
5. For additional accounts, click **Add a line** until the full rebudget has been allocated. When done, select the **OK** button.

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Accounts

New accounts can be added to any of the requests identified in this document when they are needed.

1. Click on the **Accounts** link in the **Accounts** panel.
2. Click **Add account** on the Account list screen.
3. Select the **type** of account needed and enter a **description** of what it is for.
4. All additional fields are optional at this stage but can be entered if known. Once finished, click **Done**.
5. If more accounts need to be created, repeat steps 1-5. Once done, use the breadcrumbs above the screen title to navigate back to the request homepage.

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At-risk/advance accounts

*If new accounts are needed, they can be added from the **Accounts** panel. This request is for accounts that are not yet activated.*

1. Click on the **Edit** button on the **At-risk accounts** panel.
2. If no accounts appear to select as at-risk, cancel and then go create them using the **Accounts** panel.
3. If accounts appear, check the box to the left of each one you wish to make at-risk. Click **Next**.
4. Enter the **At-risk amount**, **start date** and **end date** for which you seek approval for each of the accounts to be at-risk. Click **Finish**.

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