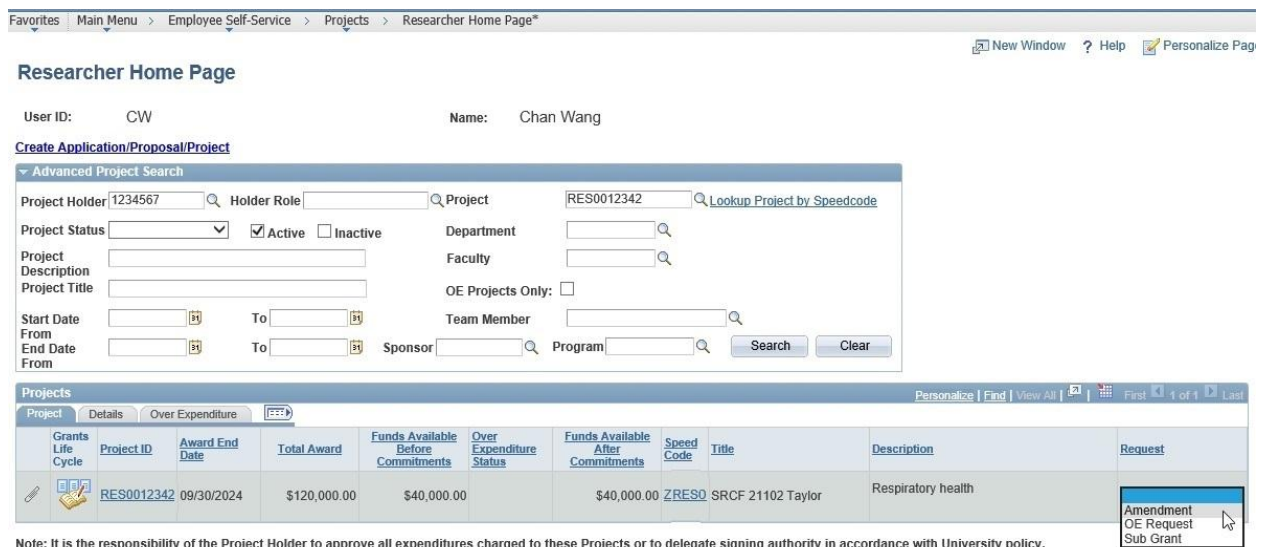


Creating an Amendment

1. First you will need to log in to the [Researcher Home Page](#) by entering your CCID and password.

Once signed in you will need to click the main menu, Employee self serve, projects, Researcher Home Page.

This will bring up a list of active projects and information including the end dates of each project. In the request column on the far right hand side you will need to click on the downward arrow and select amendment.



The screenshot shows the 'Researcher Home Page' interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Employee Self-Service', 'Projects', and 'Researcher Home Page*'. Below this, the user's information is displayed: 'User ID: CW' and 'Name: Chan Wang'. A link for 'Create Application/Proposal/Project' is visible. The main section is titled 'Advanced Project Search' and contains several search criteria fields: Project Holder (1234567), Holder Role, Project (RES0012342), Project Status (Active/Inactive), Department, Faculty, Project Description, Project Title, Start Date, End Date, OE Projects Only, Team Member, Sponsor, and Program. There are 'Search' and 'Clear' buttons. Below the search form is a table titled 'Projects' with columns: Grants Life Cycle, Project ID, Award End Date, Total Award, Funds Available Before Commitments, Over Expenditure Status, Funds Available After Commitments, Speed Code, Title, Description, and Request. The table contains one row for project 'RES0012342' with a 'Request' dropdown menu open, showing options: 'Amendment', 'OE Request', and 'Sub Grant'. A note at the bottom states: 'Note: It is the responsibility of the Project Holder to approve all expenditures charged to these Projects or to delegate signing authority in accordance with University policy.'

Once you have selected the specific project to amend this will bring you to a new page to Create an Amendment.

The top of the page will display the project's current information such as Project ID number, Project Holder, Dept ID start and end date, etc..

2. Amendment Details Section - click the "yes" for the type of amendment. As only one amendment request can be in progress at a time, multiple types can be requested in one amendment. Select "yes" for all that apply.

Once you have selected the type(s), the type will be expanded in order to enter in the revised information (new end date, change in award amount, etc).

3. Additional comments section - you may add comments that you think are relevant to your request.

Amendment Details	
Change of Project End Date	<input type="checkbox"/> Yes
Change in Award Amount	<input type="checkbox"/> Yes
Change in Department	<input type="checkbox"/> Yes
Change in PI/Project Holder	<input type="checkbox"/> Yes
Add/Remove Sponsor	<input type="checkbox"/> Yes
Other	<input type="checkbox"/> Yes

Additional Comments:

4. Certification section - you must declare yes or no to each of the four types of certifications by selecting from the dropdown menu. If you have a protocol number this can be entered in the Assurance Number column.

Certification Info		Personalize Find View All First 1-4 of 4 Last			
	Certification Code	Required	Assurance Number		
1	Animal Welfare 01	<input type="checkbox"/>	AUP	<input type="checkbox"/>	<input type="checkbox"/>
2	Human Ethics 01	<input type="checkbox"/>	PRO	<input type="checkbox"/>	<input type="checkbox"/>
3	Biohazards	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
4	Stem Cell	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

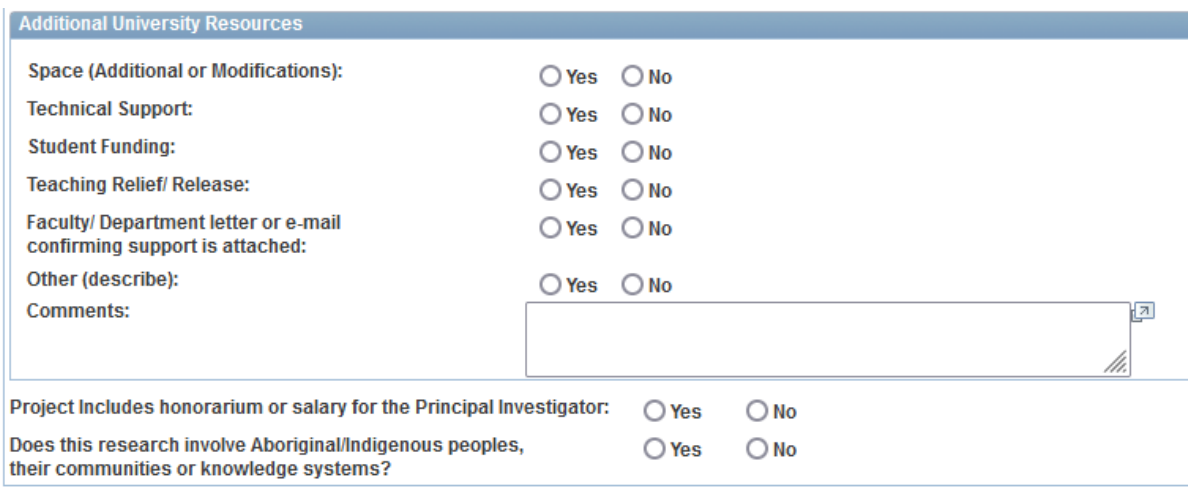
5. Attachments section - Depending upon the type of amendment requested, you may need to attach the sponsor’s written approval of the change. This might be in the form of an email, letter, or amending agreement. For additional information regarding requirements, please review the

[Amendments](#) page on our website. The department and faculty will need to see this prior to approving the amendment request.



Attachments		Personalize	Find	First	1 of 1	Last
	File Name	DateTime Added				
1						

6. Additional University Resources Section - a declaration of yes or no must be made for each of the statements.



Additional University Resources

Space (Additional or Modifications): Yes No

Technical Support: Yes No

Student Funding: Yes No

Teaching Relief/ Release: Yes No

Faculty/ Department letter or e-mail confirming support is attached: Yes No

Other (describe): Yes No

Comments:

Project Includes honorarium or salary for the Principal Investigator: Yes No

Does this research involve Aboriginal/Indigenous peoples, their communities or knowledge systems? Yes No

7. Once you have entered all relevant information into the request, you will need to click the submit button at the bottom of the page. Clicking submit will electronically send the amendment request to the department/faculty for approval.



Approvals

Approval Status: Not Submitted for Approval

Save Submit Cancel Amendment

Once approved by the Faculty, it will arrive at Research Services and be assigned to a Contract Specialist for review and processing.

For further information regarding amendments please see the RSO Website [Amendments](#) Page.