

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:

- [Pre-award expenditure](#)
- [Carryforward](#)
- [No-cost extension](#)
- [Budget change](#)
- [Subrecipient addition](#)
- [Interfaculty addition](#)
- [Other](#)
- [Change of PI](#)
- [Early termination](#)

Internal requests:

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

4. Click **Create request**.

From the request homepage 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:

- Approval questions have not been answered
- Subrecipient(s) missing
- Change PI information is missing
- Other request details are missing
- No-cost extension information is missing
- Budget information is missing
- Carryforward information is missing
- Early termination information is missing

- Pre-award expenditure information is missing
- Change tub/org information is missing
- New account information is missing
- Create new account(s) to designate as at-risk
- At-risk account information is missing
- Justification is missing

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

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 **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.
3. Enter the **Direct cost amount** and the **Associated indirect cost amount** to be spent during the pre-award period. Once finished, click **Done**.

Edit pre-award expenditure information ✕

Pre-award start date

Direct cost amount

Associated indirect cost amount

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Carryforward Requests

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. Once finished, 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

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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. Once finished, 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

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Budget change

1. Adding budget changes can be done from the “Budget type is missing” action required **Edit** button, and from the budget panel **Edit** button on the request home.
2. When selecting the budget type there will be three different budget changes to select from. Once a selection has been made additional required actions will generate prompting for budget information.
 - a. Equipment rebudget
 - i. This option will be disabled if the project has not been awarded yet.
 - b. Account reallocations
 - c. Rebudget

Budget types ✕

Select all that apply

Account reallocations

Rebudget

Equipment rebudget

3. Equipment rebudget

- a. Equipment rebudget can be entered by selecting the “Equipment information type is missing” action required **Edit** button, and from the **Edit** button on the *equipment rebudget section in the budget panel*.
- b. Enter the **Vendor, Equipment to be purchased** and the **Price**.
- c. Click **Add** until all the equipment to be purchased has been entered.
- d. When all equipment has been entered select the **Done** button.

Equipment rebudget ✕

Vendor

Equipment to be purchased

Price of equipment

✕

Vendor

Equipment to be purchased

Price of equipment

4. Account reallocations

- a. Account reallocations can be entered by selecting the “Account reallocations are missing” action required **Edit** button, and from the **Edit** button on the *account reallocation section in the budget panel*.
 - i. If new accounts are needed, they can be added from the **Accounts** panel.
- b. Enter the **Amount** to be reallocated between accounts.
- c. If the account reallocations includes restricted categories select the “Includes restricted categories” **Check box**.
 - i. This check box will be disabled if the project has not been awarded yet.
- d. Select the **Account** and **Object code** which the amount will be taken from.
- e. Select the **Account** and **Object code** which the amount will be added to.
- f. For additional account allocations, click **Add** until the full rebudget has been allocated.
- g. When all reallocations have been entered select the **Done** button.

Account reallocations ✕

Amount Includes restricted categories

From account To account

From object code To object code

✕

Amount

From account Includes restricted categories

From object code To account

To object code

5. Rebudget

- a. Rebudget can be entered by selecting the “Rebudget is missing” action required **Edit** button, and from the **Edit** button on the *rebudget section in the budget panel*.

- b. Enter the new value for the budget in the **New direct costs**, **New subagreement costs**, and **New indirect costs** fields.
 - i. The total cost will be automatically calculated as you enter values.
- c. There is an optional field to include additional details.

Rebudget ✕

New direct costs

New subagreement costs

New indirect costs

Total costs \$15,000.00

Additional details Optional

4000 characters remaining

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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.
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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Interfaculty involvement

1. Adding interfaculty involvements can be done from the “Interfaculty involvements” panel **Edit** button (unlike the other requests, this one does not have an action required).
2. From the “Edit interfaculty involvement” screen, select “Add interfaculty involvement”.
3. Look up the interfaculty involvement principal investigator and indicate whether they should be added to the research team as well.
 - a. If the individual should be added to the research team, this will need to be done through an Edit research team request.
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.

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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Other

The “Other” request should not be used in place of an existing request type supported in GMAS.

For example, the “Other” request type should not be used to request an extension of time. Instead that should be a No-Cost extension request.

1. Adding request details can be done from the “Other request details are missing” action required **Edit** button.
2. Enter the details of the request. Once finished, click **Done**.

Edit other request details ✕

Please provide request details

Cancel Done

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Change of PI

1. Adding request details can be done from the “Change PI information is missing” action required **Edit** button.
2. Look up the **new PI** and identify the **date** they will take over the project.

Edit change PI request



Does the change of PI also include a change to the primary managing tub/org? Yes No

Change responsible PI

Current PI Nikola Tesla

New PI

PI change effective date

Cancel

Done

3. If the new PI sits in a different org, and the award will also be transferring to that org, select **Yes** to the question “Does the change of PI also include a change to the primary managing tub/org” to show the Change tub/org section.
4. Look up the **new org** and identify the **date** the change will take place.
5. Once finished, click **Done**.

Edit change PI request



Does the change of PI also include a change to the primary managing tub/org?

 Yes No

Change responsible PI

Current PI Nikola Tesla

New PI PI change effective date 

Change tub/org

Current tub 370 - FCOR*FAS Core

New tub 385 - FMUS*FAS Museums

Current org 31570 - FCOR*MCB - Org Res


New org Org change effective date [Back to top](#)

Early termination

1. Adding early termination information can be done from the “Early termination information is missing” action required **Edit** button.
2. Enter the **New end date** of the award. Once finished, click **Done**.

Edit early termination information



New end date 

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New Accounts

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

1. Click on the **Add** button in the **Accounts** panel.
2. Select the **type** of account needed and enter a **description** of what it is for.
3. All additional fields are optional but can be entered if known. Once finished, click **Done**.

Add account

Request account

Type ▼

Description

Year Optional

Start date Optional

End date Optional

Account group ▼

Research country ▼ Optional

Campus location ▼ Optional

Indirect cost basis ▼ Optional

Indirect cost rate(s) effective on Optional

[+ Add rate](#)

Chart of accounts values

Tub 275 - SPH*TH Chan School of Public Health

Org

Fund 261522

Activity ▼ Optional

Subactivity Optional

Root Optional

[Cancel](#) [Done](#)

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At-risk accounts

1. Adding at-risk information can be done from the “At-Risk account information is missing” action required **Edit** button.
 - a. If there are no accounts available to be designated as at-risk, you will first be prompted to create new account(s) to designate as at-risk.
 - b. Select the **type** of account needed and enter a **description** of what it is for.
 - c. All additional fields are optional at this stage but can be entered if known. Once finished, click

Done.



2. Check the box to the left of each account you wish to make at-risk.
3. Enter the **At-risk amount**, **start date** and **end date** for which you seek approval for each of the accounts to be at-risk. Once finished, click **Done**.

Account(s) to be at-risk

 Info

Request ID #

	Group	Description	Request type	Year	Type	Tub	Org	Fund	Activity	Subactivity	Root	Status
<input checked="" type="checkbox"/>	01	 	At-Risk account(s)		Part-of	275	23515	112219				Under Development

At-risk amount At-risk start date  At-risk end date 


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Change of tub/org

1. Adding request details can be done from the “Change tub/org information is missing” action required **Edit** button.
2. Look up the **new org** and identify the **date** the change will take place. If the new org is in a different tub than the existing org, the new tub will display. Once finished, click **Done**.

Edit tub/org ✕

Change tub/org

Org change effective date 

New org

Current org 23515 - SPH*EH-Environmental+Occupational Medicine+Epi

Current tub 275 - SPH*TH Chan School of Public Health

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