

Creating Amendment to Agreement

- From the *Research Documentation/Extramural Agreements* screen, click **Active** and **416/417/Agreements/421 or Incoming Agreements** (if \$25,000 or under and no 416/417 attached) from the Menu Bar.
- On the query screen, enter the project number, accession number, log number or agreement number to find the project, and click **query** or press **Enter**. The project will then be displayed on the List screen.
- Mark the project and click **Action** and **Create Work Record – Amendment**. The system will ask if you really want to create a work record. Click **Yes**. Once the work record is created, exit out of the Active file and go to the Work file.
- Click **Work** and **416/417/Agreement or Incoming Agreements** (if \$25,000 or under) and the List screen will be displayed.
- Select the project to modify by placing a check in the box to the left of the project number or by moving your cursor over the project.

Agreements with 416/417 attached (\$25,000 and above):

- Go to **Comments** field and enter the reason for the action. For example, Extending term date from 08-01-15 to 08-01-16 and receiving \$20,000 from USB.
- If extending term date, go to **Project Info** tab and change term date to new term date. Then go to **Forms, Incoming Agreement**, add new dollar amount to ARS Proposed Total Funding. Click on SOF/Funds tab and add the new money to the appropriate line items. At this time the Proposed Amount on the SOF/Funds tab should show the new money and Total Proposed should show new agreement amount.

Agreements less than \$25,000 (no 416/417 attached):

- Go to **Comments** field and enter the reason for the action. For example, Extending term date from 08-01-15 to 08-01-16 and receiving \$20,000 from USB.
- Add new dollar amount to ARS Proposed Total Funding. This total should equal the new agreement total.
- Click on SOF/Funds tab and add the new money to the appropriate line items. At this time the Proposed Amount on the SOF/Funds tab should show the new money and Total Proposed should show new agreement amount. If the new amount causes the total to exceed \$25,000, you will need to add a 416/417 at this time.
- Click on **Forms, Agreement Info (AIMS)**.
- Enter into **Comments**: Amendment # for the purpose of extending term date to 8-1-16 and adding FY15 funds of \$20,000.
- Click on **Accounting** tab and enter appropriate account code or 999 9999 999, FY and new dollar amount.
- Click on **Forms**, click on **SOW/Budget**. Enter new breakdown of new dollar amount. This dollar amount should equal with the SOF tab, total proposed.