

Transcript – Change of Institution

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Welcome to the 10th of a series of tutorial videos that review the features & functionalities of the eRA Commons Status Screen.

In this tutorial, Signing Officials will come to understand the steps to submit an electronic version of a Relinquishing Statement to Grants Management which initiates the Change of Institution request.

The Change of Institution process allows the grantee institution to give up, or surrender, a grant to another institution, who will take over the approved research project.

The Change of Institution process is comprised of two parts

The first being the grantee institution must submit a Relinquishing Statement via Commons.

The Relinquishing Statement identifies the institution that is going to accept the grant, and all the related conditions and responsibilities.

The second part of the process is the receiving institution must submit an error free application to NIH through Grants.gov, making them eligible to receive the surrendered grant.

For the Signing Official to initiate a Relinquishing Statement, they must first log into eRA Commons.

The Relinquishing Statement must be submitted before the end of the approved project period.

After logging into eRA Commons, click the Status menu option.

From the Status screen, click on the Change of Institution link along the left side.

The Change of Institution link opens a screen with two forms. One is for searching for a grant to be relinquished.

The second is for a grant where the relinquishing statement has already been initiated.

To initiate a Search for Grants, complete the minimum required fields which are the Institution code and the Serial Number.

Then click the Search button.

The system will return the results on the Status Result – Change of Institution screen.

From this screen you will be able to create, edit and save the Relinquishing Statement by clicking on the Manage Relinquishing Statement link in the Action column

After clicking the link, the system displays the Manage Relinquishing Statement screen.

If the award is in a no cost extension or within three months of the project period end date, the following informational message window appears.

If this message appears, click the OK button to proceed to the Manage Relinquishing Statement screen.

If no relinquishing statement for the selected grant has been previously started, the system will alert you to this fact with the text reading "No Relinquishing Statements have been submitted for this grant yet."

To initiate a Relinquishing Statement, click the Start a new RS button. This will open the Relinquishing Statement form.

The fields identified by the red asterisk are required fields.

New Institution Name, Contact Email at the Institution, Requested Termination Date, and Direct Cost dollars.

To complete these fields, start by clicking the Search button to begin a New Institution – Search.

The Institution Name, DUNS Number, and IPF Code are not directly editable.

The only way to complete these fields is to use the Search option.

The search for the receiving institution can be done using the Institution Name, their IPF number or their DUNS number.

After clicking the Search button, the system will display the results. To add the desired institution to the Relinquishing Statement, click on the IPF number. The system inserts the receiving institution's name, DUNS number and IPF Code in the appropriate text boxes on the Relinquishing Statement screen.

Complete the remaining fields Contact Email at the Institution, Requested Termination Date, Direct Cost, and Indirect Cost.

Type "NONE" in the Equipment Transferring with the Project section if there is no equipment to be transferred.

To save the Relinquishing Statement, click the Save button.

The system displays the Relinquishing Statement Form on the Relinquishing Statement screen and sets its status to SO Work in Progress.

The system will send a notification to the contact email for the receiving institution as specified on the Relinquishing Statement form.

NOTE: If the receiving institution is not registered in the NIH eRA Commons it will not be able to view the relinquishing statement.

The new institution needs to register in the eRA Commons and contact the eRA Help Desk for assistance in linking the relinquishing statement to the new institution account.

If information is needed from the Principle Investigator, the Signing Official can route the Relinquishing Statement to the PI by clicking the Route to PI button.

This will open the Route Relinquishing Statement form. The Next Reviewer field displays the contact PD/PI from the application.

If desired, enter any comments in the Comments box and click the Route to PI button.

The Status of RS is updated to PD/PI Work in Progress.

After any edits have been made by the Principle Investigator, the Relinquishing Statement can be routed back to the Signing Official.

With the Relinquishing Statement now “owned” by the Signing Official, it can be submitted to NIH.

From the Relinquishing Statement form the Signing Official clicks the Submit button.

The system displays the Submit Relinquishing Statement to NIH screen. The Certification Acceptance Statement is displayed.

When the I Agree button is clicked, the system displays the Manage Relinquishing Statement screen with the following message

The Relinquishing Statement has been submitted to NIH.

The Status of RS field displays Submitted to Agency.

This concludes Tutorial Number 10, Accessing and Submitting a Change of Institution request.

Thank you for watching.