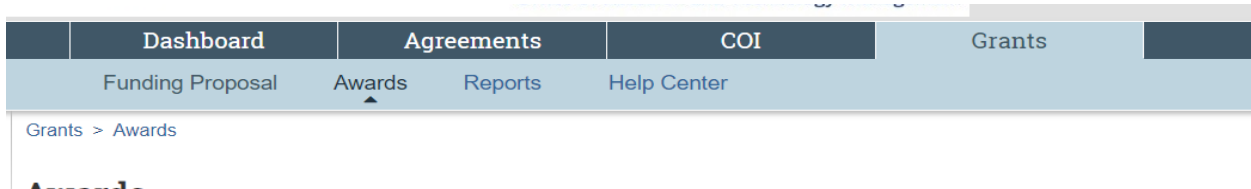


## How to Complete an Award Modification Request (AMR):

- 1) Log into the Sparta Grants system, which can be found through <https://userservices.case.edu/U/Services/>, and click into “**Grants**”.
- 2) Once on the SPARTA Grant homepage you will have to click into “**Awards**” to search and find the one you wish to modify.



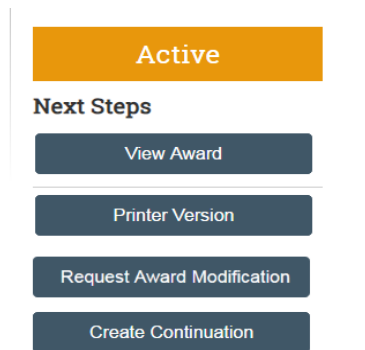
- 3) You can search for your award by doing the following:
  - a. Once you are in the awards section you will be brought to a search bar. For the most accuracy you should search **by Contract Number**, which is highlighted below. It will always begin with **CONXXXXXX**, and it can be found on the top of your monthly expense reports. A missing CON Number indicates that the award may not be set up properly in the Sparta system.
  - b. You can also search by “**Award PI**”, which is simply searching by the Investigator assigned to the award. You may have to sift through numerous awards if the Investigator is attached to more than one.
  - c. You may also search by the **Name** of the award if you know how it was input into the system. Unfortunately, most awards are shortened due to the character limit so this may be more tedious than it seems.

The screenshot shows the 'Awards' search results page. A search filter dropdown is open, showing options: ID, Name, State, Award PI, Reviewer, Award Approver, Direct Sponsor, Sponsor Award ID, Specialist, and Movement. The search results table has columns: ID, SmartForm State, Award PI, Reviewer, Award Approver, and Direct Sponsor. Three awards are listed:

ID	SmartForm State	Award PI	Reviewer	Award Approver	Direct Sponsor
CON239637	[Edit]	Active Oakes	Donze		JobsOhio
CON601240	[Edit]	Active Goldberg	Vitale		Cleveland Foundation
CON233430	[Edit]	Active Bryden	Doss		Cleveland State University

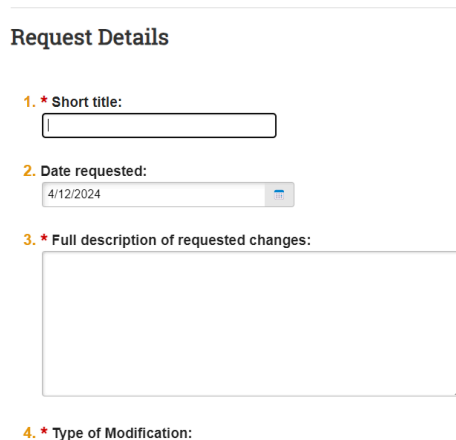
- 4) Once you have found the award you are looking to file an AMR under click on said award to begin the modification request.

- 5) Once you have selected the Award you wish to modify you will have to click the “**Request Award Modification**”, which can be found on the left-hand side of the page.



The screenshot shows a sidebar menu for an 'Active' award. At the top is an orange box with the word 'Active'. Below it is a section titled 'Next Steps' containing four dark blue buttons: 'View Award', 'Printer Version', 'Request Award Modification', and 'Create Continuation'.

- 6) Once you have decided to modify said award you will be brought to the first page of information that must be filled out: **a short title, date requested, full description, and the type of modification you intend to make.**



The screenshot shows the 'Request Details' form. It has four numbered fields: 1. 'Short title:' with a text input box. 2. 'Date requested:' with a date picker showing '4/12/2024'. 3. 'Full description of requested changes:' with a large text area. 4. 'Type of Modification:' with a dropdown menu.

- 7) You will then have to attach the appropriate supporting documentation such as current income and expense statement, additional personnel, changes to PI, etc.
- 8) Click Save and Finish.
- 9) You will be returned to the Grants main page as in step 2), but the request has still not been submitted in Sparta Grants.
- 10) Approval from the PI is required prior to submitting the AMR. This is accomplished through Ancillary Review.
- 11) Select “**Manage Ancillary Reviews**” in the left-hand menu.
- 12) A new window will open requesting you to “**Identify each organization or person who should provide additional review.**”
- 13) Click on the “**+ Add**” button and yet another new window will open titled “**Add Ancillary Review**”.
- 14) You can search for your PI in two ways:
- To search by **Organization**, click on the three dots to the right of the window.
    - Another window opens and you can search by:

1. **Organization**, which is the CWRU Department Name, or
    2. **ID**, which is the CWRU Department six-digit speedtype number.
    3. Once you find the department, you may select it.
  - b. To search by **Person**, click on the three dots to the right of the window.
    - i. Another window opens and you can search by the PI's name.
      1. Once you find the PI's name, you may select it.
- 15) Next you need to select the **Review Type**. This will be the same as what you selected for the AMR (i.e. Change of PI, No Cost Extension, Petition to keep account open...).
- 16) Select the **"Yes"** if this review is being done by the PI.
- 17) Add any comments you want the reviewer to know.
- 18) You can also attach any supporting documents for review.
- 19) Select **"OK"** and a message from Sparta Grants will be sent to the reviewer for them to approve and submit the Ancillary Review.
- 20) Once the reviewer has submitted their Ancillary Review, a message from Sparta Grants will come back to you saying, "Ancillary review has been completed for the Award. Click the link above to access and review the submission details".
- 21) Clicking on the AMR link in that email will take you back into the AMR in Sparta Grants. The next step is to select **"Submit to Specialist"** from the menu on the left side of the page.
- 22) The AMR is now submitted in Sparta Grants for processing. Once the requested award action is completed, a final message will come back to you either saying the request has been completed or requesting additional information or steps to be taken to complete the action.