



PROJECT UPDATE REQUEST FORM

For Questions or HELP with the completion of this form, please contact (403) 210-9300 or finance@ucalgary.ca

ALL APPLICABLE SECTIONS MUST BE COMPLETED WITH ALL REQUISITE SIGNATURES IN PLACE BEFORE YOUR REQUEST CAN BE COMPLETED

PRE-ASSESSMENT QUESTIONNAIRE (Required to be filled out for ALL requests)

	Has your update been approved by an external sponsor? If YES , signatures on form not required. Include the approval from the external sponsor with the form.
	Has your Project been funded by another externally restricted (Fund 60 or 70) UCalgary Project? If YES , additional signatures required for Extensions Only on Page 3.
	Is your Project funded by a Gift / Donation? If YES , additional approval required from the Office of Advancement Gift Compliance at steward@ucalgary.ca (main campus) or fdmed@ucalgary.ca (Cumming School of Medicine).

REASON FOR CHANGE

PROJECT INFORMATION

RSO/RMS# (if applicable)

PROJECT #

Reference # (if applicable)

Effective Date for Change

	Current	New
Fund Code		
Dept ID * (Additional Approvals required)		
Project Holder Change ** (Additional Approvals required)		
Project Short Description <small>Note: max 30 characters, some short descriptions are restricted to a standard naming convention and cannot be changed</small>		
Project Long Description		
Purpose of Funds		
Start Date (YYYY/MM/DD)		
End Date *** (YYYY/MM/DD) <small>Note: Extensions with additional funding, include Project Budget Form</small>		

ACTIVITY CODES (Project Holder approval not required)

	Current	New
Activity Code – New and Name		Activity Code _____
		Activity Name _____
Activity Code Name Change for Activity Code _____		
Activity Code – Inactivation		

REQUIRED ATTACHMENTS

Please note, the following are required for Project Updates:

- 1) Budget for all additional or reduction of funds (submit **Project Budget Form**)
- 2) Revised Notice of Award, Contract, or Agreement for all amendments (**Externally Restricted Fund 60 and 70**)
- 3) Email and / or Notification of Revision (**Internally Restricted Net Asset – IRNA – Fund 11, 12, 13, 14, 18, and 19**)
- 4) All requisite certifications for **Research** Projects (**Fund 11, 18, and 60**)

REQUEST COMPLETED BY

Last Name	<input type="text"/>	First Name	<input type="text"/>
Email	<input type="text"/>	Phone #	<input type="text"/>

PROJECT HOLDER APPROVAL SIGNATURE (EXCEPT ACTIVITY CODES / FUND CODE, IF INITIATED BY CENTRAL FINANCE)

Project Holder's Signature	Print Name	Signed Date (YYYY/MM/DD)
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****PROJECT HOLDER CHANGES ONLY - DECLARATION AND APPROVAL SIGNATURE**

The signature of the **New** Project Holder (Signing Authority) confirms the accuracy of the information provided, including an attestation that the certifications and / or biosafety permits attached to this form are all inclusive and applicable to the project. It also signifies agreement to use the monies for the Sponsor's specified purposes, observe the Sponsor's terms and conditions, and follow the university policies and procedures. Further, the signature of the Project Holder (Signing Authority) authorizes to include the "Requestor," if different than the Project Holder when Research Accounting sends email notification upon completion of Project changes.

New Project Holder's Signature	Print Name	Signed Date (YYYY/MM/DD)
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***** EXTENSIONS ONLY – REVIEW AND APPROVAL SIGNATURES**

***** Note: VP and / or Provost Approval required for extensions on Internally Restricted Net Asset (IRNA) projects (Fund 11, 12, 13, 14, 18, and 19). Finance will facilitate receiving the VP and / or Provost Approval. Project Holder / Finance Delegate Approval required for extensions if funded by another externally restricted UCalgary Project, Finance will facilitate receiving Funding Project Holder Approval if not included below.**

Dept Head / Dean / ADR / AVP Signature (One Up if same as Project Holder)	Print Name	Signed Date (YYYY/MM/DD)
Funding Project Holder Signature (If Funded by another Externally Restricted UCalgary Project)	Print Name	Signed Date (YYYY/MM/DD)

*** DEPARTMENT ID CHANGES ONLY – REVIEW AND APPROVAL SIGNATURES**

Current Dept Head Signature	Print Name	Signed Date (YYYY/MM/DD)
New Dept Head Signature	Print Name	Signed Date (YYYY/MM/DD)

FOR ALL EXTENSIONS WITH ADDITIONAL FUNDING / CHANGES TO EXISTING BUDGET, INCLUDE THE PROJECT BUDGET FORM

PLEASE SUBMIT COMPLETED FORM WITH SUPPORTING DOCUMENTS TO:

- Project Holder Changes (Fund 11 and 60) to rsogrants@ucalgary.ca
- Gift / Donation Projects, Endowment Interest Income Projects, and Activity Code Requests to finance@ucalgary.ca
- IRNA Projects and Externally Restricted Non-Research Projects (Fund 11, 12, 13, 14, 18, 19, 50, and 70) to finance@ucalgary.ca
- External Awards (Funded by another Externally Restricted Project) to finance@ucalgary.ca
- Industry-Sponsored Projects for Cumming School of Medicine to medoadr@ucalgary.ca
- Industry-Sponsored Projects for Faculties other than Cumming School of Medicine to legaladm@ucalgary.ca
- All other Externally Restricted (Fund 60) Projects to rsogrants@ucalgary.ca

Project Update Approval			
Update Requested	Externally Restricted Projects (Fund 50, 60, and 70)	Internally Restricted Net Asset (IRNA) Projects (Fund 11, 12, 13, 14, 18, and 19)	Comments
Fund Code	Project Holder	Project Holder	Finance Approval – Facilitated by Finance
Dept ID	Project Holder Department Head	Project Holder Department Head	Finance Approval – Facilitated by Finance
Project Holder Name	Agency Approval Current Project Holder New Project Holder	One Up Approval* Current Project Holder New Project Holder	*If Current Project Holder is no longer at UCalgary, One Up Approval Required
Project Holder Name (Donations)	Office of Advancement Approval Current Project Holder New Project Holder	Office of Advancement Approval One Up Approval* Current Project Holder New Project Holder	*If Current Project Holder is no longer at UCalgary, One Up Approval Required
Project Short Description	Project Holder	Project Holder	Some Short Descriptions are restricted to a standard naming convention and cannot be changed Finance Approval – Facilitated by Finance
Project Long Description	Agency Approval Project Holder	Project Holder	Finance Approval – Facilitated by Finance
Purpose of Funds	Agency Approval Project Holder Dean / AVP Approval	Project Holder	Finance Approval – Facilitated by Finance
Sponsor – Change to Multiple Sources	Project Holder		Finance Approval – Facilitated by Finance
Activity Code	Not Required	Not Required	
Start Date	Agency Approval Project Holder	Project Holder	Finance Approval – Facilitated by Finance
End Date	Agency Approval Project Holder	VP and / or Provost Approval Project Holder	If Sponsor does not indicate an end date in agreement, Dean / AVP approval will be required to extend VP and / or Provost Approval – Facilitated by Finance