

# ORS Procedure for PI Change, Department/Unit Change, or Change of Credit for Sponsored Proposals and Awards

## PI/CO-PI CHANGE

In the event that a TTU grant/contract must be transferred internally from one Lead PI (or Co-PI) to another, please follow the procedure outlined below.

The Lead Principal Investigator involved in the grant/contract must notify their ORS analyst of the intended transfer through submission of a completed ORS Information Change Sheet.

- Download “Information Change Sheet” from ORS website under Helpful Links/Forms & Boilerplates/Proposal Forms. The form uses Cayuse SP terminology (Lead PI/PI).
- Enter Cayuse SP proposal number.
- Select “Lead PI/PI Change” radio button; doing so generates compliance questions that should be answered by the named person(s) who were not on the original internal routing form. The “Add Co-investigator” button can be used if additional lines are necessary.

The document must be signed by the Relinquishing and Accepting Lead PI/Co-PIs as well as their respective Department Chairs and Deans (as appropriate). Document may be signed manually, electronically, or routed using *Cayuse 424* (form would need to be attached to 424 record). Electronic routing record would be accepted in lieu of signatures.

When all signatures have been obtained (or otherwise routed), transmit to the ORS analyst who is assisting you. Additional documentation, such as biographical sketch and current and pending support, may be required by the sponsor.

## DEPARTMENT/UNIT CHANGE

In the event that a TTU grant/contract must be transferred internally from one department or unit to another, please follow the procedure outlined below.

The Lead Principal Investigator involved in the grant/contract must notify their ORS analyst of the intended transfer through submission of a completed ORS Information Change Sheet.

- Download “Information Change Sheet” from ORS website under Helpful Links/Forms & Boilerplates/Proposal Forms. The form uses Cayuse SP terminology (Lead PI/PI).
- Enter Cayuse SP proposal number.

- Select “Department Change” radio button.

The document must be signed by the Lead PI as well as the Relinquishing and Accepting Department Chairs their respective Dean(s), as appropriate. Document may be signed manually, electronically, or routed using *Cayuse 424* (form would need to be attached to 424 record). Electronic routing record would be accepted in lieu of signatures.

When all signatures have been obtained (or otherwise routed), transmit to the ORS analyst who is assisting you.

## **CREDIT CHANGE**

In the event that credit for a TTU grant/contract must be transferred internally from one Lead PI (or Co-PI) to another, please follow the procedure outlined below. This procedure is ONLY to redistribute credit between the original signators of the internal routing document. If any additional person is named please refer to instructions for Lead PI/Co-PI Change.

The Lead Principal Investigator involved in the grant/contract must notify their ORS analyst of the intended transfer through submission of a completed ORS Information Change Sheet.

- Download “Information Change Sheet” from ORS website under Helpful Links/Forms & Boilerplates/Proposal Forms. The form uses Cayuse SP terminology (Lead PI/PI).
- Enter Cayuse SP proposal number.
- Select “Credit Change” radio button. The “Add Co-investigator” button can be used if additional lines are necessary.

The document must be signed by the Relinquishing and Accepting Lead PI/Co-PIs as well as their respective Department Chairs and Deans (as appropriate). Document may be signed manually, electronically, or routed using *Cayuse 424* (form would need to be attached to 424 record). Electronic routing record would be accepted in lieu of signatures.

When all signatures have been obtained (or otherwise routed), transmit to the ORS analyst who is assisting you.