

# Proposal Change Requests in InfoEd

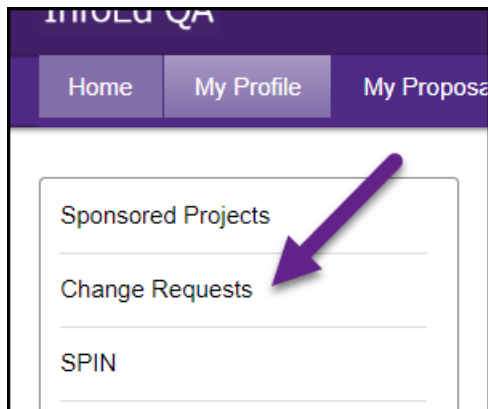
Post award requests can be submitted in InfoEd. Requests can be initiated from the InfoEd home screen or from the Proposal Tracking page of a proposal record. This guide details how to initiate these types of requests in InfoEd.

[Create a Change Request from the home page](#)

[Create a Change Request from an existing proposal](#)

## Create a Change Request from the home page

1. Login to [InfoEd](#) with your netID and password.
2. Create a change request from the InfoEd portal by clicking **Change Requests** from the left hand menu.



- a. If you don't see the option to create a change request, you may need to submit a [security request form](#).
3. Click the type of request from the **Create New** menu on the **Change Requests** page.

Change Requests		
<b>Create New</b>		
Award Relinquishment / Transfer	BGT - Carry-Forward of Unobligated Balance	BGT - Open New Budget Categories
BGT - Revised Budget for Submitted Proposal	BGT - Revised Budget for an Award	Change in Scope/SOW
Change of Department	F&A Waiver	Fabricated Equipment
Industry Clinical Amendment - Other	No-Cost Extension	PI Eligibility
Personnel - Effort Change for PI or Key	Personnel - Extended Absence of PI	Personnel - PI or Co-I Change
Prespending	Subcontract - Request to Issue New Subaward	Subcontract - Subcontract Amendment

4. Each request type will open a different form. All required questions on the form must be answered before the form can be submitted.

Example: No Cost Extension Form

5. All change request forms must be linked to an existing proposal. To link to a proposal record:
  - a. Click on the **Add New** button.


- b. Any of the search criteria can be used to find proposals.
      - i. If the proposal number is known, enter it in the **Select by Number** field at the top and click **Go**. *Select by Number is case sensitive and wild cards do not work.*

- ii. Other criteria can be set by clicking the **Set** link next to the search option. Click **Go** after all criteria is set.

### Browse By

Sponsor/Scheme  [Set](#)


Primary Center/Program  [Set](#)



- c. Search results will return at the bottom of the page.
  - i. Click the **check box** next to the desired proposal and then click **Select** to link the proposal to the agreement. Do NOT select multiple proposal records. The form will not function correctly and could result in issues during processing.


1 of 1

Sponsor/Scheme	PI	<input type="checkbox"/> <a href="#">Select</a>
A. C. Buehler Foundation	Cafe 30, Project	<input type="checkbox"/>



- d. The linkage will appear on the form. Save the form by clicking either of the **Save** buttons at the top of the screen. The linkage will not be stored until the form is saved. The linkage can be updated anytime until the form is submitted but changes will not take effect until the form is saved. Complete the form as required.

Linked Proposal:



☰
Close
Validate
Submit
Save

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**NO-COST EXTENSION**

Tracking #:

**\* Linked Proposal:**

Institution # : [SP0048532](#)

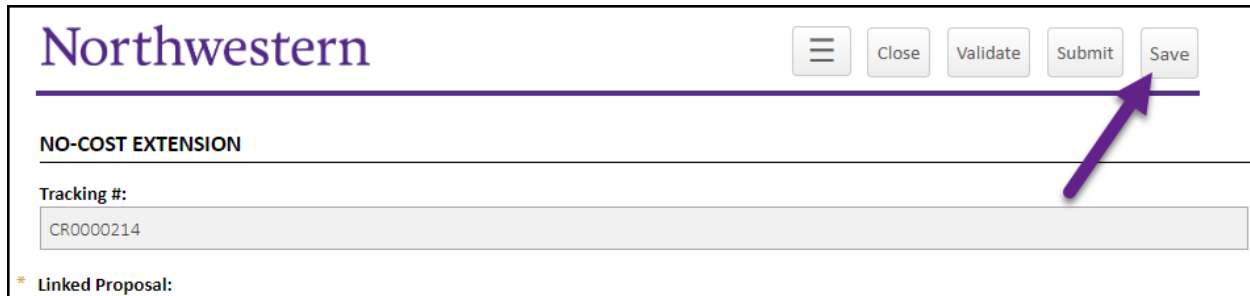
Principle Investigator :

Proposal Title :

Originating Sponsor :

Sponsor :

Save Option:



Northwestern

Close Validate Submit Save

**NO-COST EXTENSION**

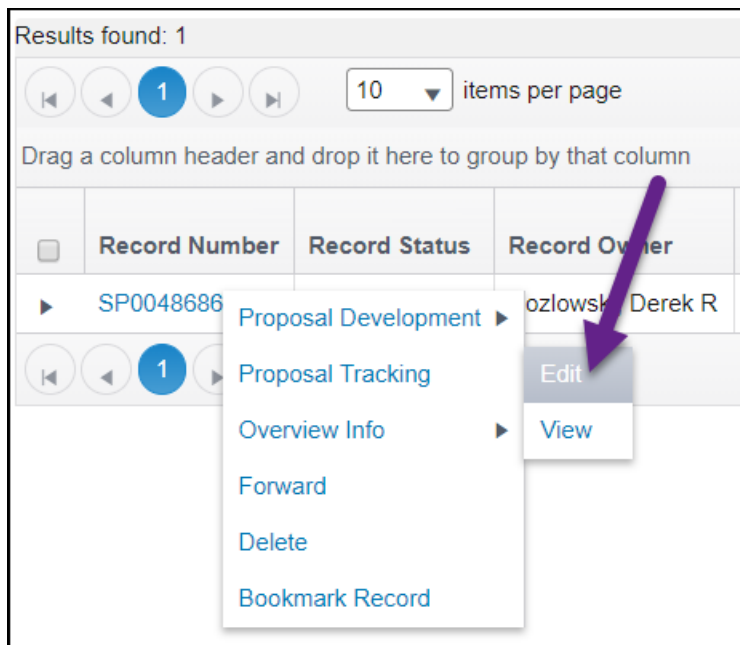
Tracking #:  
CR0000214

\* Linked Proposal:

6. The form can be checked for completeness by clicking the **Validate** button at any time. This will highlight any required questions that are unanswered.
7. When finished, click the **Submit** button. Based on the type of request, the form will either move into routing for approvals or go directly to OSR for review.

## Create a Change Request from an existing proposal

1. Login to [InfoEd](#) with your netID and password.
2. Search for a proposal record, select **Proposal Tracking**, and click **Edit**.



Results found: 1

10 items per page

Drag a column header and drop it here to group by that column

Record Number	Record Status	Record Owner
SP0048686	Proposal Development	ozlowski, Derek R

Proposal Tracking

Overview Info

Forward

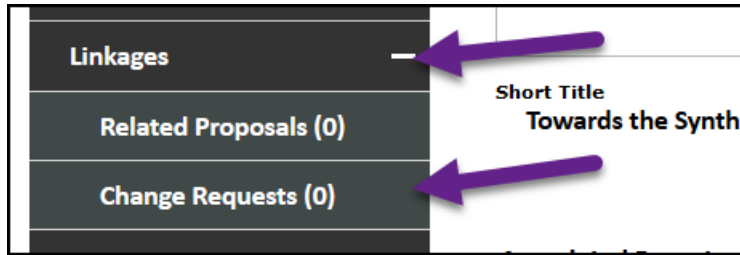
Delete

Bookmark Record

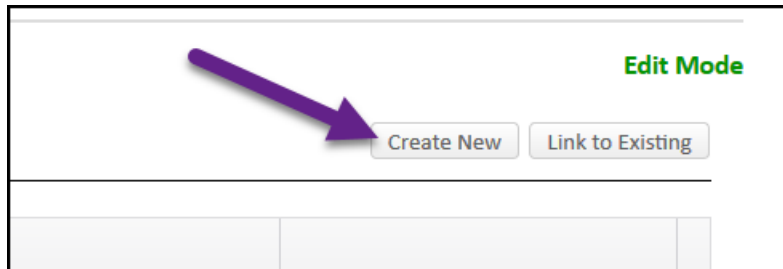
Edit

View

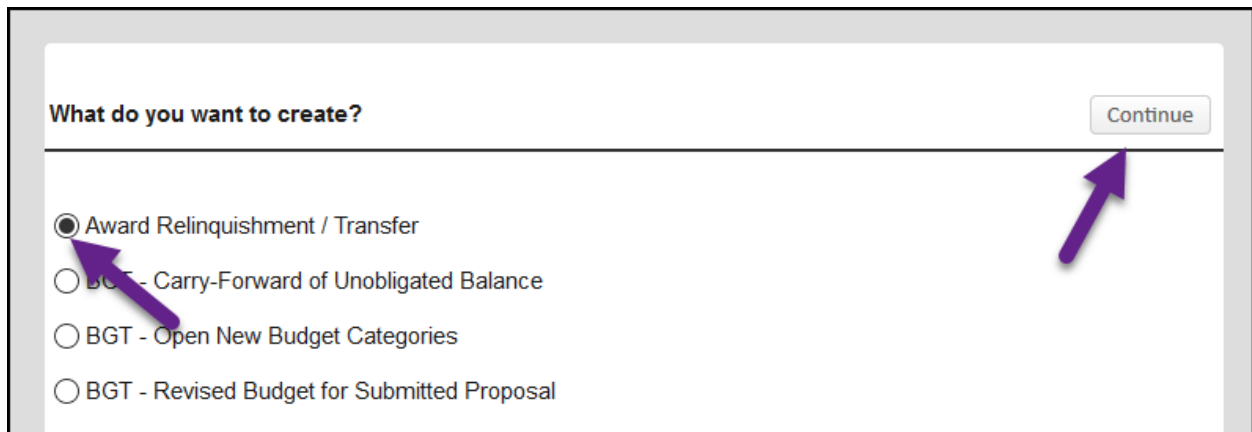
- From the left hand navigation, click the **plus symbol** to expand the **Linkages** and click the **Change Request** tab.



- Click the **Create New** button in the upper right corner.
  - Note – the **Link to Existing** button can be used to link the proposal to a change request already in progress that has not yet been linked to a proposal.



- Select the **radio button** next to the type of Change Request and click the **Continue** button in the upper right corner to initiate the request.



- The form will automatically link to the proposal and prepopulate with the proposal information. Complete the form as required.

# Northwestern

☰ Close Validate Submit Save

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## AWARD RELINQUISHMENT/TRANSFER

### Request Information

**Tracking #:**  
CRO000724

**\* Linked Proposal:**

Institution #:	SPOC
Principal Investigator:	
Proposal Title:	Towards the Synthesis of
Originating Sponsor:	Army Research Office
Sponsor:	Army Research Office
Award Department:	Chemistry

Delete

7. The form can be checked for completeness by clicking the **Validate** button at any time. This will highlight any required questions that are unanswered.
8. When finished, click the **Submit** button. Based on the type of request, the form will either move into routing for approvals or go directly to OSR for review.