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Phone: 301-402-7469

TTY: 301-451-5939

Web: <http://grants.nih.gov/support> (Preferred method of contact)

Email: commons@od.nih.gov (for Commons Support)

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1 Change of Institution Overview

The Commons Change of Institution process allows the extramural grantee institution to submit an electronic version of a Relinquishing Statement (RS) to the Grants Management community for processing and allows the other grantee institution that is proposed to take over the relinquished grant to access the submitted RS.

The institution holding the grant must complete a Relinquishing Statement through eRA Commons that states it is giving up the grant and identifies the receiving institution. The receiving institution must submit an application via Grants.gov using the Parent Funding Opportunity Announcement listed at http://grants.nih.gov/grants/guide/parent_announcements.htm. Please look for an NIH Guide Notice.

NOTE: This functionality only applies to NIH grants. This is an open pilot. This means that either the electronic process documented here can be used or the traditional paper process can be used.

1.1 Features

The Commons system has the following features to accommodate a Change of Institution:

- Create, view, update, save, submit, and route the RS via the Commons Status screen
- Create RS in PDF format upon submitting the RS to the Agency
- Event generated and time sensitive eMail Notifications to appropriate users

1.2 Users

The following users are involved in the Change of Institution process.

1. Signing Official (SO)
 - a. The original institution's SO can perform the following RS functions: Start a new one, View, Edit, Save, Route, Cancel, Delete and Submit RS to Agency.
 - b. The receiving institution's SO can perform the following functions: View RS
2. Project Director/Principal Investigator (PD/PI)
 - a. The original institution's PD/PI can perform the following RS functions: View, Edit, Save, Cancel changes, and Route the RS to the SO for submitting to the Agency.
3. NIH Internal User
 - a. The internal user can perform the following RS functions: View, Save, Cancel changes, and Link the RS.
4. Grants Management Official (GMO) or Grants Management Specialist (GMS)
 - a. The GMO or GMS can perform the following RS functions: View, Receive, and Return the RS.

1.3 Business Rules

1.3.1 Eligible Grants

All awarded and active grants are eligible to be relinquished except for the ones with the following statuses:

- 02 – Withdrawn
- 21 – Ineligible organization - application withdrawn
- 30 – Withdrawn by Institute/Center (IC)
- 34 – Administratively withdrawn by IC prior to review or council

Subprojects, Institutional Allowances, and Supplements are excluded from being eligible.

RS(s) may be submitted for any activity code.

1.3.2 Access to RS

Only users with the SO authority at the grantee institution can access the Change of Institution option on the Commons Status screen.

The RS can be accessed only by the SO for grant applications from their grantee institution eligible for transfer.

Only the SO for the grantee institution has the authority to submit the RS to the Agency.

The RS can be accessed by the PD/PI for grantee applications where the PD/PI role is the current reviewer of the RS.

The internal user is able to access the RS in Submitted or Accepted for Consideration status and is able to update the New Institution Name, IPF code and DUNS number of the new institution to which a grant is relinquished.

1.3.3 RS Reviewers

If the SO initiated the RS and routed it to the PD/PI, then the PD/PI can review, edit specific fields, save and route the RS back to the SO.

Any SO at the grantee institution is able to create, review, edit, save, route, and submit the RS.

1.3.4 RS Routing Order

The next reviewer in the list of valid next reviewers is always the contact PD/PI on the application. The current user is not shown in the list of valid next reviewers on the RS. If SO is the current reviewer, then the contact PD/PI is the next reviewer by default.

If the PD/PI is the current reviewer, the SO who initiated the RS is the first and default entry in the list on the RS. All other users with the SO role appear alphabetically by last name after the first

entry. The information displayed for each valid next reviewer is as follows: Name (LAST, FIRST).

If the SO routes the RS to the PD/PI, the Route to Next Reviewer screen is named: Route to PD/PI.

If the PD/PI routes the RS to the SO, the Route to Next Reviewer screen is named: Route to SO.

The RS can be routed back and forth between the SO and the PD/PI for an unlimited number of times.

1.3.5 Validation

PD/PI verification is not required. The SO is able to submit the RS without routing it to the PD/PI.

The PD/PI has edit capability only for the New Institution Name information and Contact information in the new Institution Section of the RS.

Saving the RS does not execute any validations. The RS is validated upon submitting it to the Agency. The exception is that new Institution data is validated upon routing the RS by the PD/PI to the SO.

The RS cannot be submitted to the Agency with validation errors, but the RS can be submitted to Agency with validation warnings.

RS(s) submitted for pre-award are not validated for the costs relinquished. They can be zero or the original application's requested funds amounts.

1.3.6 Other Rules

The system allows multiple RS submissions. The SO is able to submit a new RS only if no RS has been submitted or if the existing RS(s) have been acknowledged (Accepted for Consideration or Refused status) by the Grants Management Specialist (GMS) user.

The RS can be deleted by the SO from the relinquishing institution if it is in the SO Work In Progress (WIP) state and has never been submitted to the Agency.

All submitted and accepted versions of the RS(s) are visible to the receiving institution.

Grant applications for the new institution should be submitted within thirty days after the Relinquishing Statement is submitted from the former institution.

The Relinquishing Statement should be submitted within thirty days of the grant application for the new institution.

2 Manage Relinquishing Statement

2.1 Relinquishing SO Responsibilities

2.1.1 Start or Edit a Relinquishing Statement

The Change of Institution process is initiated by the Signing Official (SO) for the original grantee institution that has agreed to relinquish responsibility for an active grant. This must occur before the expiration of the approved project period.

1. On the Commons *Status* screen, click on the **Change of Institution** link.

The screenshot shows the eRA Commons Status screen. At the top, there is a navigation bar with links: Home, Admin, Institution Profile, Personal Profile, Status, eSNAP, xTrain, Links, eRA Partners, and Help. The user is logged in as 'UNIVERSITY OF CALIFORNIA SAN DIEGO' with authority 'SO'. The main content area is titled 'Status' and contains an 'Important Note' about search parameters. Below the note is a list of search options: General Search, Just in Time, Pending Progress Report, Recently Awarded, Recent/Pending eSubmissions, Closeout, and Change of Institution. The 'Change of Institution' link is circled in red. To the right of the links is a 'General Search' form with fields for Grant Number, Accession Number, Grants.gov Tracking #, PI Name (Last and First), Application Status, Budget Start Date, Budget End Date, and Organization Hierarchy (School, Division, Department). The form has 'Search' and 'Clear' buttons at the bottom.

Figure 1: Commons Status Screen Displaying Change of Institution Link

The system displays the *Status – Change of Institution* search options.

2. To find the grant to relinquish, complete at minimum the required fields: **Institution Code** and **Serial Num.**

NOTE: The required fields are noted by an asterisk.

3. Click the **Search** button.

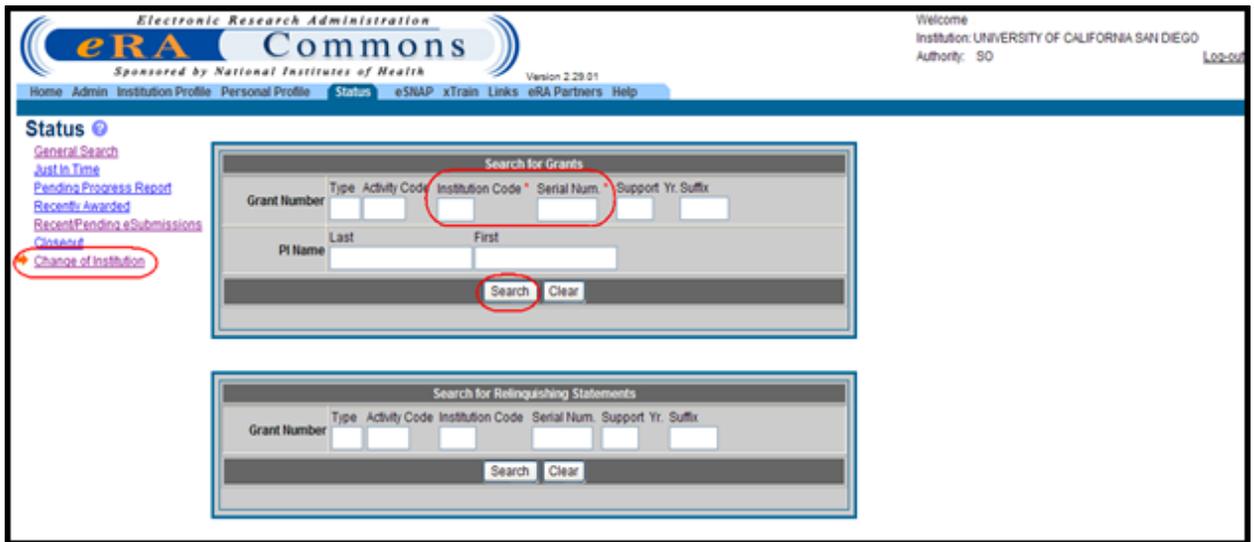


Figure 2: Status - Change of Institution Search Screen

The system displays the search results on the *Status Result – Change of Institution* screen.

NOTE: The RS functionality is not available from other Status search result’s screens.

4. After the grant to be relinquished is found, click on the **Manage Relinquishing Statement** link on the *Status Result – Change of Institution* screen.

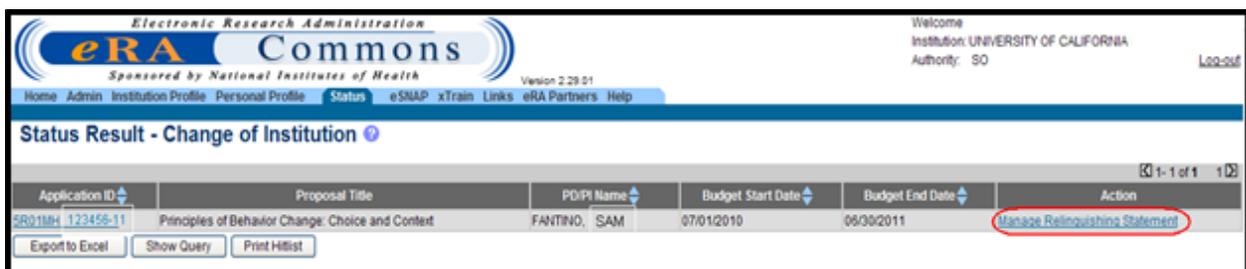


Figure 3: Status Result - Change of Institution Screen

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 pop-up message appears:

You have selected an award in a no-cost extension/within three months of the project period end date. NIH Institutes & Centers (ICs) policies may limit change of grantee organization requests based on the amount of time remaining on the award. Please contact the awarding IC to determine IC policy.

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

5. To start a new RS: Click the **Start a new RS** button.

NOTE: If an RS has already been submitted, a new RS cannot be submitted unless the prior RS(s) shows a status of *Accepted for Consideration* or *Refused*.



Figure 4: Starting a New Relinquishing Statement

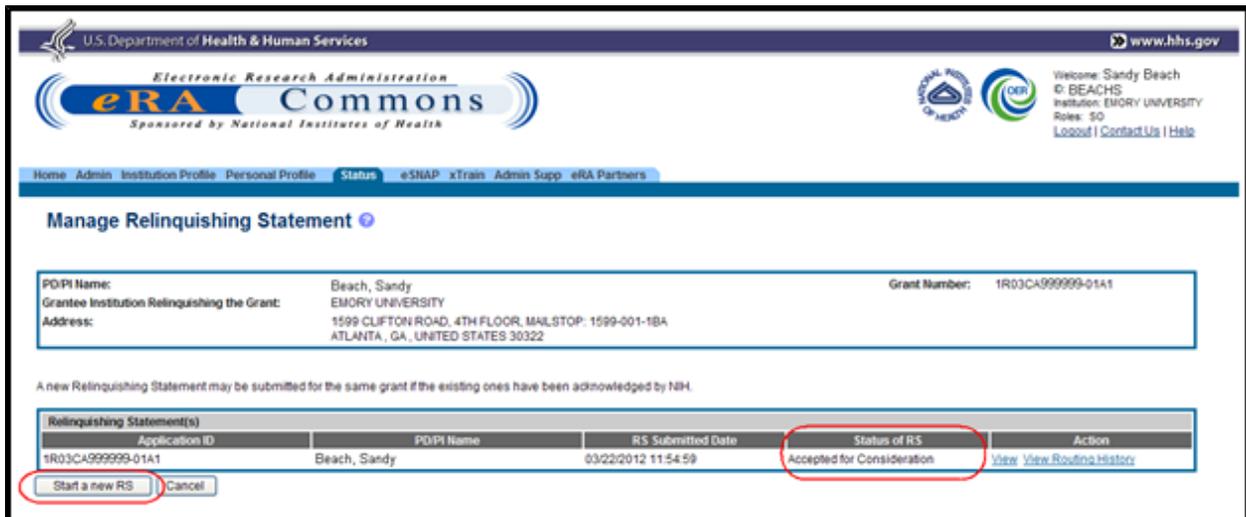


Figure 5: Manage Relinquishing Statement Screen Displaying Accepted for Consideration Status

6. To edit a RS that is in progress: Click the **Edit** link.

NOTE: To edit an RS, the RS's status must be SO Work in Progress (WIP) or Returned.

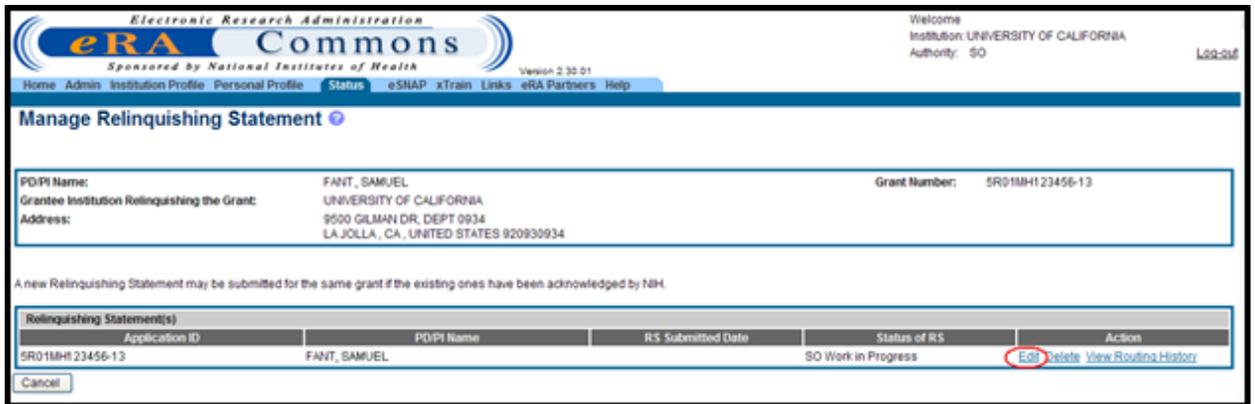


Figure 6: Manage Relinquishing Statement Screen Displaying Edit Feature

When either the **Start a new RS** button or **Edit** link is selected, the system displays the *Relinquishing Statement* screen.

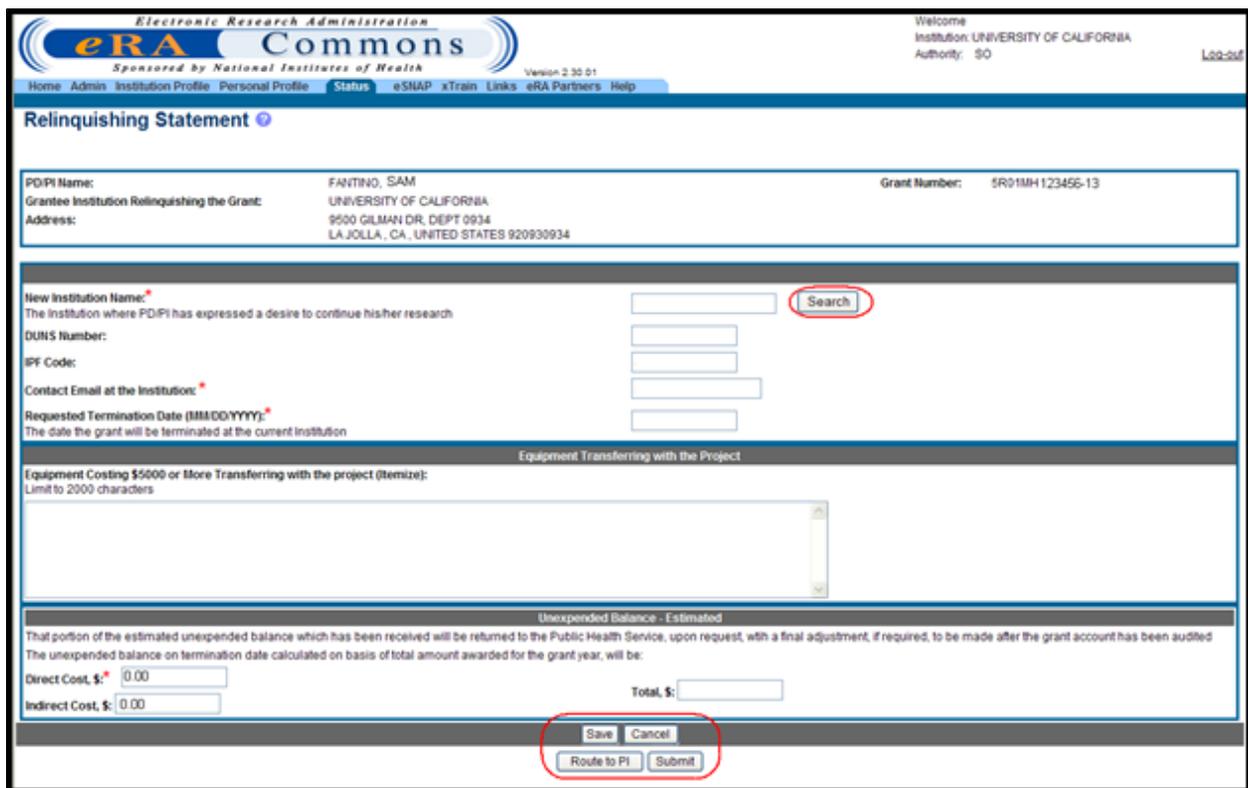


Figure 7: Relinquishing Statement Screen

7. Complete or edit the RS Form as follows:

NOTE: The required fields are noted by an asterisk. The following fields are required: **New Institution Name**, **Contact Email at the Institution**, **Requested Termination Date (MMDDYYYY)**, and **Direct Cost \$**.

- a. Click the **Search** button in the **New Institution Name** section to search for the receiving institution within the NIH eRA Commons database. For more information please refer to the topic titled [Search for Institution on Page 8](#).
 - b. Complete the remaining fields: **Contact Email at the Institution**, **Requested Termination Date (MMDDYYYY)**, **Direct Cost \$**, and **Indirect Cost \$**.
 - c. Type, NONE, in the **Equipment Transferring with the Project** section if there is no equipment to be transferred.
8. To save the RS, click the **Save** button.

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

2.1.2 Search for Institution

When the **Search** button is clicked for the **New Institution Name:** field on the *Manage Relinquishing Statement* screen, the system displays the *New Institution – Search* screen.

The screenshot displays the 'New Institution - Search' interface. At the top, the eRA Commons logo is visible, along with user information: 'Welcome alinak_so', 'Institution: UNIVERSITY OF CALIFORNIA SAN DIEGO', and 'Authority: SO'. A navigation bar includes links for Home, Admin, Institution Profile, Personal Profile, Status, eSNAP, xTrain, Links, eRA Partners, and Help. The main content area is titled 'New Institution - Search' and contains the following elements:

- A message: 'At least one search criteria is required.'
- Search criteria fields: 'Institution Name: keuka', 'IPF Number:', and 'DUNS Number:'. A red circle highlights the 'Search' button.
- A table with the following data:

Organization	IPF Code	DUNS Number	Location
KEUKA COLLEGE	4256001		KEUKA PARK, NY, 14478
- A message: 'To select the Institution - click on IPF number.'
- A message: 'If the required institution has not been found - type the institution name in the box provided below and insert into Relinquishing Statement form.'
- A field for 'New Institution Name:' with a red circle around it.
- 'Insert' and 'Cancel' buttons at the bottom right, with a red circle around the 'Insert' button.

Figure 8: New Institution - Search Screen

To search for an institution:

1. Type in the receiving institution’s name, IPF or DUNS number and click the **Search** button.

Figure 9: New Institution - Search Screen

2. If the receiving institution is found, click on the receiving institution’s **IPF Code**.

Organization	IPF Code	DUNS Number	Location
KEUKA COLLEGE	1234567	123456789	KEUKA PARK, NY, 14478

Figure 10: New Institution - Search Result Screen

The system inserts the receiving institution’s name, DUNS number and IPF Code in the appropriate text boxes on the *Relinquishing Statement* screen.

If a new institution is registered with the eRA Commons, it is highly recommended to choose it from the search results. DUNS Number and IPF code are pre-populated from the institutional profile file.

The IPF Code is used to link the submitted RS to the receiving institution and to make it viewable for SO at the receiving institution.

3. If the receiving institution is not found, type the receiving institution’s name in the **New Institution Name** text box and click the **Insert** button.

Figure 11: New Institution - Search Screen Displaying Entering an Institution Name Not

The system inserts the new receiving institution’s name in the appropriate text box on the *Manage Relinquishing Statement* screen.

NOTE: If the receiving institution is not registered in the NIH eRA Commons (IPF Code is not provided), it may not be able to view the relinquishing statement until it is registered in the eRA Commons. 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.

2.1.3 Delete a Relinquishing Statement (RS)

The RS may be deleted if the RS is in *SO Work in Progress* state and has *never* been submitted to the Agency.

Application ID	PDI Name	RS Submitted Date	Status of RS	Action
5R01MH23456-13	SHORTS, JIM		SO Work in Progress	Edit Delete View Relinq. History

Figure 12: Manage Relinquishing Statement Screen Displaying Delete Feature

1. To delete an RS, click the **Delete** link on the *Manage Relinquishing Statement* screen.

The system displays the RS in a non-editable form and the following message appears on the *Delete Relinquishing Statement* screen:

Please confirm that you would like to delete the following relinquishing statement.

Figure 13: Delete Relinquishing Statement Screen Displaying Delete Message

2. Perform one of the following options:
 - a. Click the **Delete** button on the *Delete Relinquishing Statement* screen to delete the RS.
 - b. Click the **Cancel** button to exit the screen.

If the **Delete** button is clicked, the system deletes all data associated with the RS and returns to the *Manage Relinquishing Statement* screen. If the **Cancel** button is clicked, the system returns to the *Manage Relinquishing Statement* screen.

2.1.4 Route to PD/PT

1. To route the RS to the appropriate PD/PI for further institution information if necessary, click the **Route to PI** button on the bottom of the *Relinquishing Statement* screen.

The *Route Relinquishing Statement* screen appears. The **Next Reviewer** field displays the contact PD/PI.

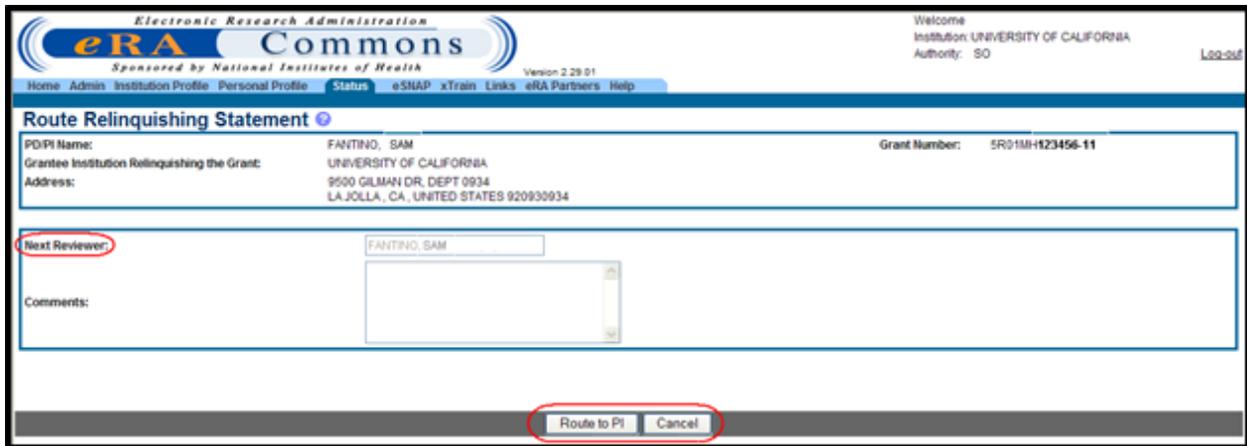


Figure 14: Route Relinquishing Statement Screen

- a. If desired, enter any comments and click the **Route to PI** button or click the **Cancel** button to exit the screen.

When the **Route to PI** button is clicked, the system displays *Route Relinquishing Statement* screen with the confirmation message and sends an email notification to the PD/PI regarding the RS. For more information please refer to the section titled [eMail Notifications](#).

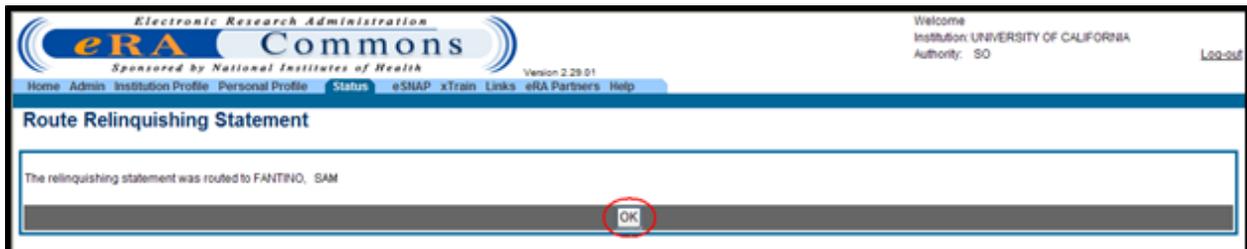


Figure 15: Route Relinquishing Statement Screen

- b. Click the **OK** button to go back to the *Manage Relinquishing Statement* screen.

The system returns to the *Manage Relinquishing Statement* screen.

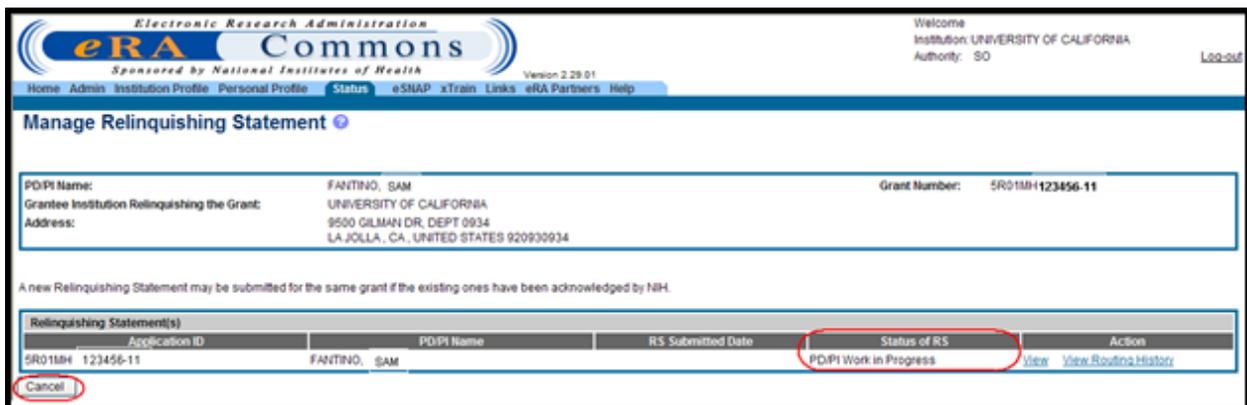


Figure 16: Manage Relinquishing Statement Screen

The **Status of RS** field displays *PD/PI Work in Progress*. If the RS is not routed to the PD/PI, the **Status of RS** field displays *SO Work in Progress*.

2.1.5 Submit Relinquishing Statement

The screenshot shows the 'Relinquishing Statement' screen. At the top, there is a navigation bar with 'Home Admin Institution Profile Personal Profile Status eSNAP xTrain Links eRA Partners Help'. The main content area is titled 'Relinquishing Statement'. It contains several sections:

- Header Information:** PO/PI Name: SEMPLE, MARY; Grant Number: 5R01MH 123456-11; Grantee Institution Relinquishing the Grant: UNIVERSITY OF CALIFORNIA SAN DIEGO; Address: 9500 GILMAN DR, DEPT 0934, LA JOLLA, CA, UNITED STATES 920930934.
- New Institution Information:** New Institution Name: COLLEGES OF THE SENECA, DBA HOBART AND WILLIAM SMITH CO; DUNS Number: 079680203; IFF Code: 3368701; Contact Email at the Institution: shortsjin@hws.edu; Requested Termination Date (MM/DD/YYYY): 03/01/2011.
- Equipment Transferring with the Project:** A section for 'Equipment Costing \$5000 or More Transferring with the project (itemize):' with a text area for details.
- Unexpected Balance - Estimated:** A section explaining that the estimated balance will be returned to the Public Health Service. It includes fields for Direct Cost (\$: 378529.00), Indirect Cost (\$: 206353.00), and Total (\$: 584882.00).
- Buttons:** 'Save', 'Cancel', 'Route to PI', and 'Submit' (highlighted with a red circle).

Figure 17: Relinquishing Statement Screen

1. To submit the RS, click the **Submit** button on the *Relinquishing Statement* screen.

NOTE: The institution name and contact information are required at the time of submission to the Agency.

The system displays the *Submit Relinquishing Statement to NIH* screen. The Certification Acceptance Statement is displayed and reads as follows:

APPLICANT ORGANIZATION CERTIFICATION AND ACCEPTANCE:

In view of the fact that we do not wish to nominate another program director/principal investigator or continue the research project at this Institution, this is to signify our willingness to terminate this grant as of [Requested Termination Date] and to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of that date, as well as to all recommended future support of this project.

That portion of the estimated unexpended balance which has been received will be returned to the Public Health Service, upon request, with a final adjustment, if required, to be made after the grant account has been audited

I certify that the statements herein are true, complete and accurate to the best of my knowledge and belief, and accept the obligation to comply with Public Health Services terms and conditions if a grant is terminated as a result of this application. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.

The screenshot shows the 'Submit Relinquishing Statement to NIH' screen. At the top, there is a navigation bar with links: Home, Admin, Institution Profile, Personal Profile, Status, eSNAP, xTrain, Links, eRA Partners, Help. The main content area is titled 'Submit Relinquishing Statement to NIH'. It contains a form with the following fields:

PI/PI Name:	KELSOE, JEFFERY	Grant Number:	2R01MH123456-11
Grantee Institution Relinquishing the Grant:	UNIVERSITY OF CALIFORNIA		
Address:	9500 GILMAN DR, DEPT 0934 LA JOLLA, CA, UNITED STATES 920930934		

Below the form is a section titled 'APPLICANT ORGANIZATION CERTIFICATION AND ACCEPTANCE' with the following text:

In view of the fact that we do not wish to nominate another program director/principal investigator or continue the research project at this institution, this is to signify our willingness to terminate this grant as of 05/01/2011 and to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of that date, as well as to all recommended future support of this project. That portion of the estimated unexpended balance which has been received will be returned to the Public Health Service, upon request, with a final adjustment, if required, to be made after the grant account has been audited. I certify that the statements herein are true, complete and accurate to the best of my knowledge and belief, and accept the obligation to comply with Public Health Services terms and conditions if a grant is terminated as a result of this application. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.

At the bottom of the form, there are two buttons: 'I Agree' and 'Cancel'.

Figure 18: Submit Relinquishing Statement To NIH Screen

2. Click the **I Agree** button to submit the RS or click the **Cancel** button to exit the screen.

If the **Cancel** button is clicked, the following screen message appears:

This relinquishing statement will not be submitted to the National Institutes of Health without agreement to the ORGANIZATION CERTIFICATION AND ACCEPTANCE statement.

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 system also creates the RS PDF file. If the system takes from thirty seconds to two minutes to generate the RS, then the system displays an informational message.

The next reviewer is internal NIH user.

The system returns to the *Manage Relinquishing Statement* screen. The **Status of RS** field displays *Submitted to Agency*.

For post awarded and post review applications, email notifications are sent to the centralized IC mailbox, the currently assigned GMS, and the PO. For pre-review applications, email notifications are sent to the Division of Receipt and Referral (DRR), the SRO if assigned, and the receiving

institution contact email provided on the RS electronic form. For more information please refer to the section titled [eMail Notifications](#).



Figure 19: Manage Relinquishing Statement Screen

3. To **View** the RS or **View Routing History**, click the appropriate link. If needed, please refer to the section titled Search/View Relinquishing Statement.

2.2 Program Director/Principle Investigator Responsibilities

If the Relinquishing Statement (RS) is routed to a PD/PI, the RS may be edited and routed back to the SO at the relinquishing institution. The PD/PI may edit only the institution information and contact email address.

- [Edit RS](#)
- [Route RS](#)

2.2.1 Edit Relinquishing Statement (RS)

1. To edit the RS, find the appropriate grant on *the Status Result – List of Applications* screen.

Application ID	Grants.gov Tracking #	Proposal Title	PDI Name	eSubmission Status	Current Application Status	Status Date	Action
5R01MH123456-05		Nonoptimal and counterintuitive choice	FANTINO, SAM		Awarded - Non-fellowships only	07/16/2002	
5R01MH123456-12		Principles of Behavior Change: Choice and Context	FANTINO, SAM	Submission Complete	Awarded - Non-fellowships only	07/30/2009	
5R01MH123456-04		Nonoptimal and counterintuitive choice	FANTINO, SAM		Awarded - Non-fellowships only	09/18/2001	
5R01MH123456-13		Principles of Behavior Change: Choice and Context	FANTINO, SAM	Submission Complete	Awarded - Non-fellowships only	06/29/2010	Relinquishing Statement
5R01MH123456-11		Principles of Behavior Change: Choice and Context	FANTINO, SAM	Submission Complete	Awarded - Non-fellowships only	06/24/2008	
5R01MH123456-08		Nonoptimal and counterintuitive choice	FANTINO, SAM	Submission Complete	Awarded - Non-fellowships only	06/27/2005	
5R01MH123456-06		Nonoptimal and counterintuitive choice	FANTINO, SAM		Awarded - Non-fellowships only	07/16/2003	
5R01MH123456-02		NONOPTIMAL AND COUNTERINTUITIVE CHOICE	FANTINO, SAM		Awarded - Non-fellowships only		
5R01MH123456-09		Principles of Behavior Change: Choice and Context	FANTINO, SAM	Pending Verification	Awarded - Non-fellowships only	05/05/2006	
5R01MH123456-03		NONOPTIMAL AND COUNTERINTUITIVE CHOICE	FANTINO, SAM		Awarded - Non-fellowships only	06/27/2000	
5R01MH123456-07		Nonoptimal and counterintuitive choice	FANTINO, SAM		Awarded - Non-fellowships only	06/29/2004	
5R01MH123456-10		Principles of Behavior Change: Choice and Context	FANTINO, SAM	Submission Complete	Awarded - Non-fellowships only	06/26/2007	

Figure 20: Status Result - List of Applications/Grants Screen

NOTE: If there are multiple PIs for a grant, the letters MPI appear to the right of the Application ID.

2. Click on the **Relinquishing Statement** link.

The system displays the *Relinquishing Statement* screen.

Relinquishing Statement

PDI Name: FANTINO, SAM Grant Number: 5R01MH123456-13
 Gantee Institution Relinquishing the Grant: UNIVERSITY OF CALIFORNIA
 Address: 9500 GILMAN DR, DEPT 0934 LA JOLLA, CA, UNITED STATES 920930934

New Institution Name:

DUNS Number:

IPF Code:

Contact Email at the Institution:

Requested Termination Date (MM/DD/YYYY):

Equipment Transferring with the Project

Equipment Costing \$5000 or More Transferring with the project (itemize):
 Limit to 2000 characters

Unexpended Balance - Estimated

That portion of the estimated unexpended balance which has been received will be returned to the Public Health Service, upon request, with a final adjustment, if required, to be made after the grant account has been audited. The unexpended balance on termination date calculated on basis of total amount awarded for the grant year, will be:

Direct Cost, \$: Total, \$:

Indirect Cost, \$:

Figure 21: Relinquishing Statement Screen

3. To add or change the institution information on the RS form, click the **Search** button in the **New Institution Name** section to search for the receiving institution within the NIH eRA Commons database. For more information please refer to the [Search for Institution](#) topic.

The system inserts the new receiving institution's name in the appropriate text box on the *Manage Relinquishing Statement* screen.

Figure 22: Relinquishing Statement Screen

4. Complete the **Contact Email at the Institution:** address.

NOTE: The email address should be in the following format: user_name@domain_name.com.

If the email address is not entered, an error message is produced. For more information please refer to the section titled [Error Messages](#).

5. Perform one of the following on the *Relinquishing Statement* screen:
 - a. To save the edits to the RS, click the **Save** button.
 - b. To cancel editing the RS, click the **Cancel** button.

2.2.2 Route Relinquishing Statement (RS) to SO

After the appropriate edits have been made to the RS, the RS is routed back to the SO for submission to the Agency.

1. To route the RS back to the SO, click the **Route to SO** button on the *Relinquishing Statement* screen.

The screenshot displays the 'Manage Relinquishing Statement' interface. At the top, it identifies the user as FANTINO, SAM and the grant as SR01MH123456-11. A table lists the statement with a status of 'PD/PI Work in Progress'. A 'Cancel' button is highlighted in red at the bottom left.

Relinquishing Statement(s)	Application ID	PD/PI Name	RS Submitted Date	Status of RS	Action
SR01MH 123456-11		FANTINO, SAM		PD/PI Work in Progress	View View Routing History

Figure 23: Relinquishing Statement Screen

If the new institution name has not been provided, then the following warning message is displayed:

The New Institution Name has not been provided. This information will be required at time of submission to agency.

If the new institution's name is not blank, the new institution's IPF number has to be provided. If the IPF number is not provided, then the following warning message is displayed:

You have selected an institution not registered in the NIH eRA Commons. Please verify the institution information. The new institution may not receive notification and will not be able to view the relinquishing statement until it is registered in the NIH Commons. The New Institution will need to register in the eRA Commons and contact the eRA helpdesk to access the relinquishing statement.

The system displays the *Route Relinquishing Statement* screen. The **Next Reviewer** is the relinquishing SO. If there is multiple SOs at the relinquishing institution, the **Next Reviewer** drop down menu can be used to select the appropriate SO to route the RS to that person. The names are displayed as last name, first name.

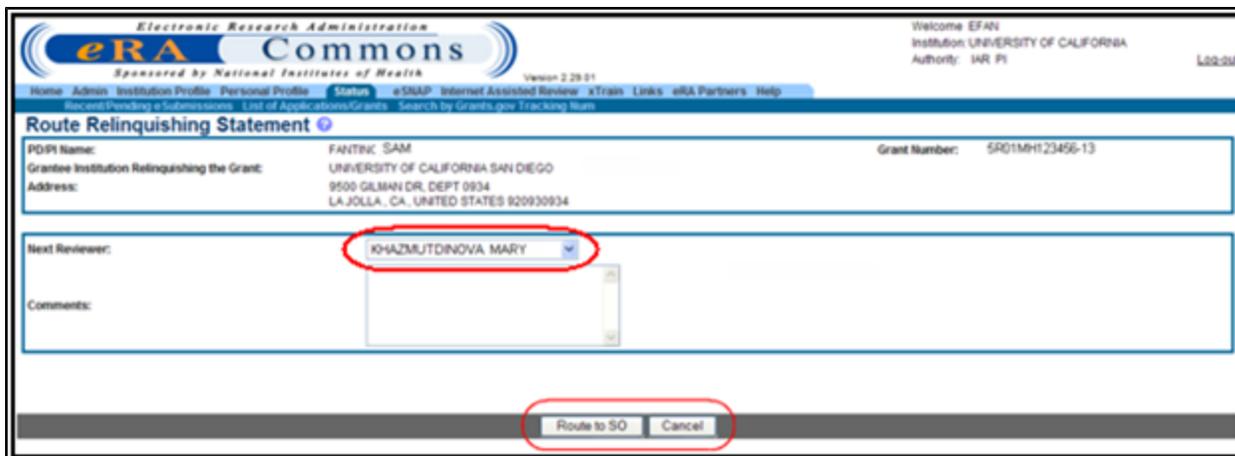


Figure 24: Route Relinquishing Statement Screen

2. Click on the **Route to SO** button to route the RS to the SO or click the **Cancel** button to return *Relinquishing Statement* screen.

If the **Route to SO** button is clicked, the system displays the *Route Relinquishing Statement* screen with an **OK** button. The following message is displayed:

The relinquishing statement was routed to <next reviewer commons user id>.



Figure 25: Route Relinquishing Statement Screen with OK Button

3. Click the **OK** button to complete the routing to the relinquishing SO.

An email notification is sent to the selected SO notifying that the RS has been routed back. For more information please refer to the section titled [eMail Notifications](#).

3 Search/View Relinquishing Statement

3.1 Signing Official Search/View Relinquishing Statement (RS)

Perform the following steps to search for a grant to relinquish or to view an RS:

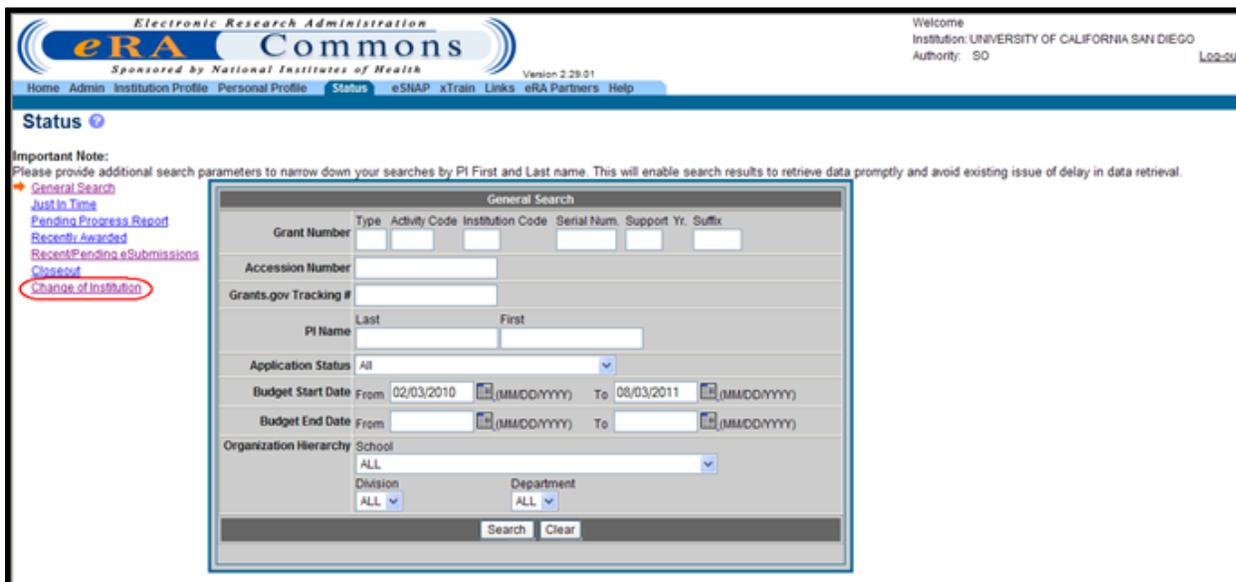


Figure 26: Status Screen Displaying Change of Institution Link

1. Click the **Change of Institution** link on the *Status* screen.

The system displays the *Status – Change of Institution* screen.

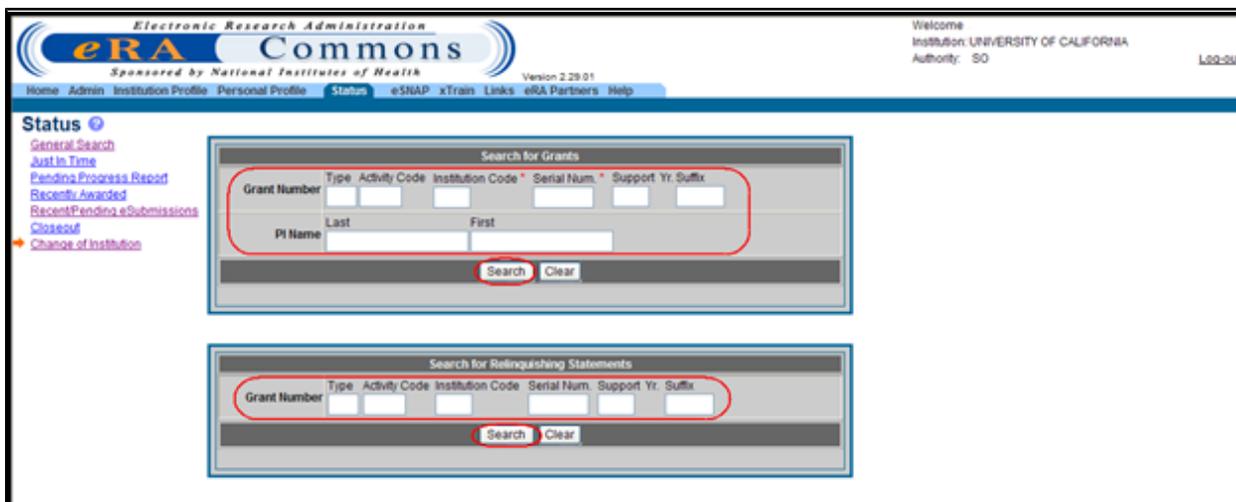


Figure 27: Status – Change of Institution Screen

3.1.1 Search for a Grant to Relinquish or to View RS

NOTE: This search is designed for the SOs at the original (relinquishing) institution.

The screenshot shows a search form titled "Search for Grants". It contains the following fields: Grant Number, Type, Activity Code, Institution Code, Serial Num, Support Yr, Suffix, PI Name (Last, First), and buttons for Search and Clear. A red box highlights the Institution Code and Serial Num fields, and another red box highlights the Search button.

Figure 28: Search for Grants Section on Status Results – Change of Institution Screen

1. To search for a grant to relinquish or for a RS in progress, enter at minimum the required fields, **Institution Code** and **Serial Num** in the **Search for Grants** section on the *Status – Change of Institution* screen and click the **Search** button.

The system displays the *Status Results – Change of Institution* screen.

The screenshot shows the "Status Result - Change of Institution" screen. It features a table with the following data:

Application ID	Proposal Title	PD/PI Name	Budget Start Date	Budget End Date	Action
CR01MM	Principles of Behavior Change: Choice and Context	FANTINO, EDMUND	07/01/2010	06/30/2011	Manage Relinquishing Statement

Buttons for "Export to Excel", "Show Query", and "Print History" are visible below the table. The "Manage Relinquishing Statement" link is circled in red.

Figure 29: Status Result - Change of Institution Screen

2. Click on the **Manage Relinquishing Statement** link.

The system displays the *Manage Relinquishing Statement* screen.

If the RS has been routed to the PD/PI by the SO or the RS has been submitted to the Agency, then the **View** and **View Routing History** links appear.

If the RS has been submitted to the Agency and returned from NIH for corrections or the RS's status is *SO Work in Progress*, then the **Edit** and **View Routing History** links appear.

For editing the RS, refer to the section titled [Manage Relinquishing Statement](#).

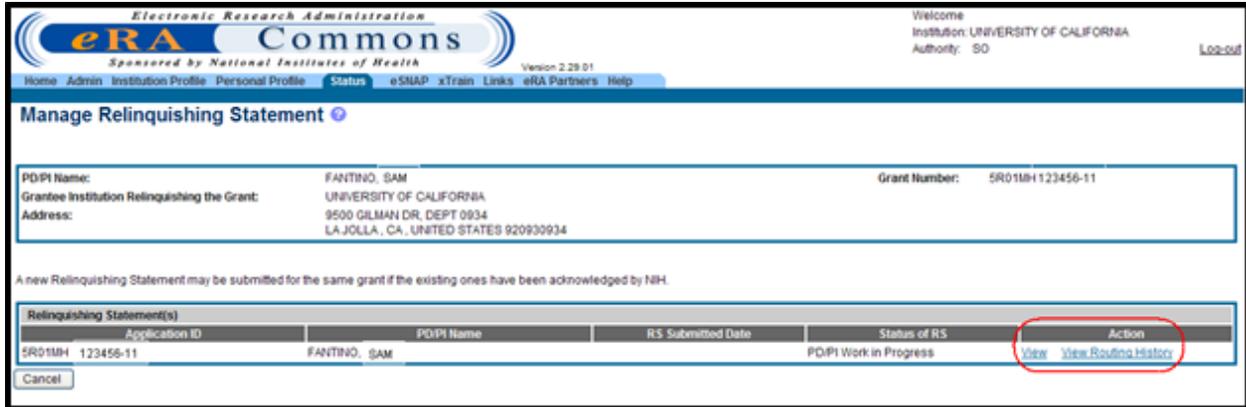


Figure 30: Manage Relinquishing Statement Screen

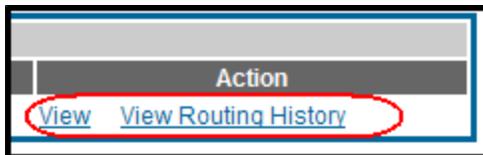


Figure 31: Action Column on Manage Relinquishing Statement Screen

- To view the RS, click the **View** link.

If the RS has not been submitted to NIH, then the system displays the non-editable *Relinquishing Statement* screen.

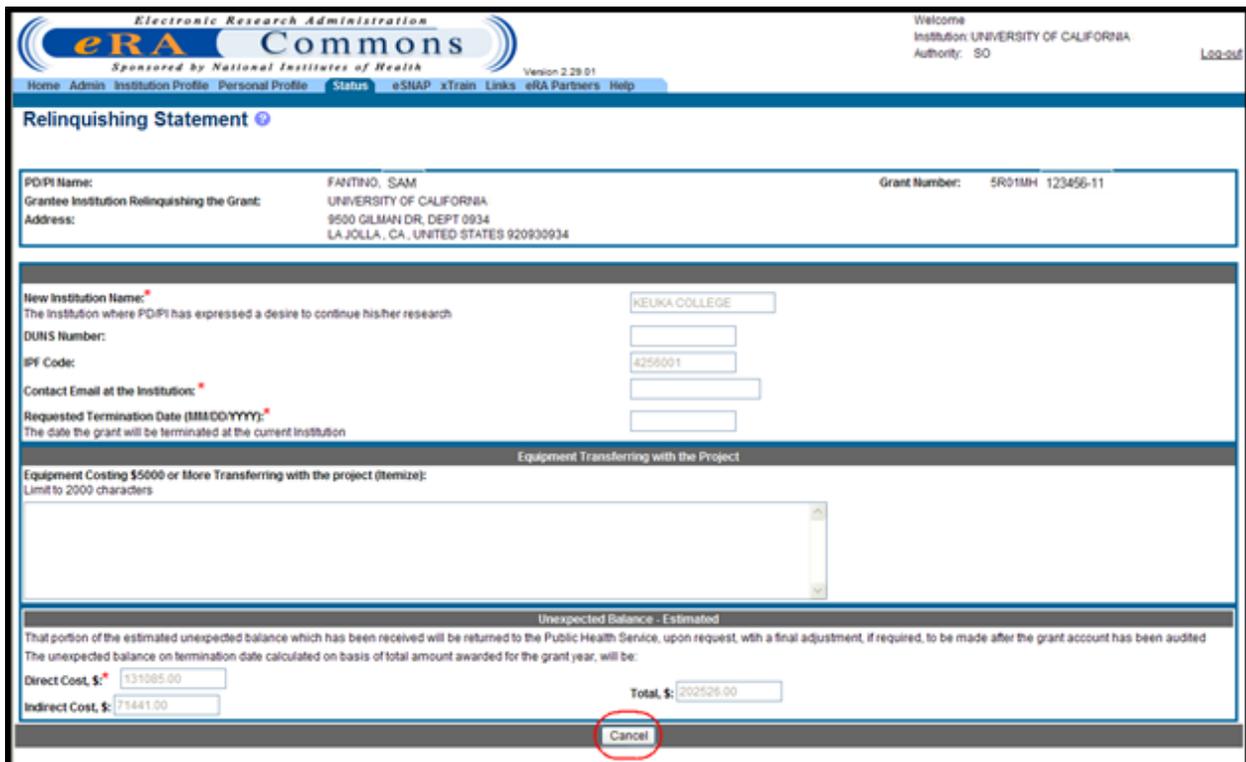


Figure 32: Relinquishing Statement Screen

4. Click the **Cancel** button on the *Relinquishing Statement* screen to return to the *Manage Relinquishing Statement* screen.

If the RS has been submitted to NIH, then the system displays the RS in PDF format in a separate window.

Approved for use through 06/30/2012
 OMB No. 0925-0001

Department of Health and Human Services, Public Health Service
**Official Statement Relinquishing Interests and
 Rights in a Public Health Service Research Grant**

Date: **04/01/2011**
 Name of Institution: **UNIVERSITY OF CALIFORNIA**
 Address (city and state): **9500 GILMAN DR, DEPT 0934
 LA JOLLA, CA, UNITED STATES 920930934**
 Principle Investigator/Program Director: **BEACH, SANDY**
 on Public Health Service grant number **5DP1OD123456-02** will resign position at this institution and has expressed a desire to continue his/her research project at the **CLARKSON UNIVERSITY**.
 Contact email at the new Institution: **light.bud@clarkson.edu**

In view of the fact that we do not wish to nominate another principal investigator or continue the research project at this Institution, this is to signify our willingness to terminate this grant as of **06/01/2011** and to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of that date, as well as to all recommended future support of this project.

Equipment costing \$5,000 or More Transferring with the project (itemize)	Unexpended Balance - Estimated
NONE	The unexpended balance on termination date of \$95,000.00 calculated on basis of total amount awarded for the grant year, will be approximately Direct cost - \$60,000.00 Indirect cost - \$35,000.00
That portion of the estimated unexpended balance which has been received will be returned to the Public Health Service, upon request, with a final adjustment, if required, to be made after the grant account has been audited.	
Official Authorized to Sign Application	
Signature SO BEACH, SANDY Submitted through the Commons	
Typed Name BEACH, SANDY	
Title Signing Official	

Figure 33: Relinquishing Statement PDF

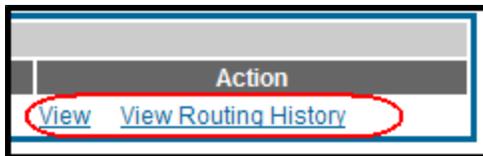


Figure 34: Action Column on Manage Relinquishing Statement Screen

- To view the RS routing history, click the **View Routing History** link.

The system displays the *View Routing History* screen. The following statuses may be seen depending on where the RS is in the process: *SO Work in Progress*, *PD/PI Work in Progress*, *Submitted to Agency*, *Returned*, *Accepted for Consideration*, *Submitted to Agency and Linked*, or *Accepted for Consideration and Linked*.

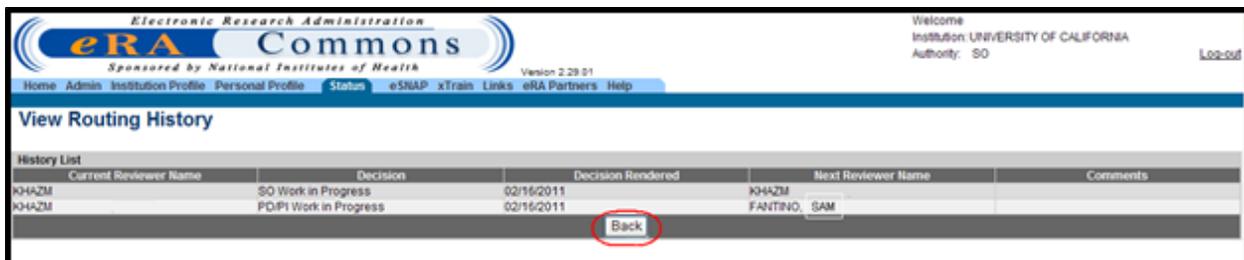


Figure 35: View Routing History Screen

- Click the **Back** button to return to the *Manage Relinquishing Statement* screen.

3.1.2 Search for Relinquishing Statements Submitted by Former Institution

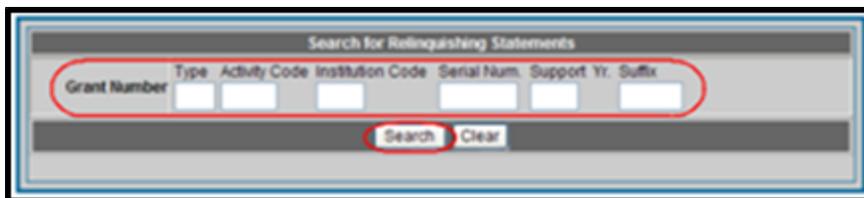


Figure 36: Search for Relinquishing Statements Section on Status Results – Change of Institution Screen

- To search for a RS(s) submitted by the former institution, enter the appropriate grant information in the **Search for Relinquishing Statements** section on the *Status – Change of Institution* screen and click the **Search** button.

If no search parameters are entered, the search returns all the RS(s) linked to the current institution by Institutional Profile File (IPF).

If the current institution has not been registered with Commons before the RS is submitted, the search does not return any results until the RS is updated with the IPF and/or the DUNS number.

If the system determines that no Relinquishing Statements have been linked to the receiving institution, then the following warning message appears:

No relinquishing statements have been associated with your institution. Please contact eRA Help Desk.

The system displays the *Status Results – Search for Relinquishing Statements* screen.

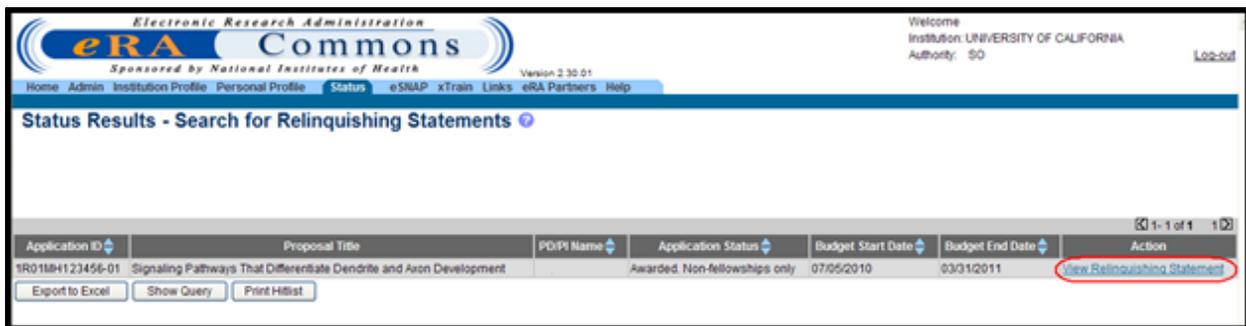


Figure 37: Status Results - Search for Relinquishing Statements Screen

2. Click the **View Relinquishing Statement** link.

The system displays the *View Relinquishing Statement* screen. Relinquishing Statements with a status of *Accepted for Consideration* or *Submitted to Agency* are displayed.

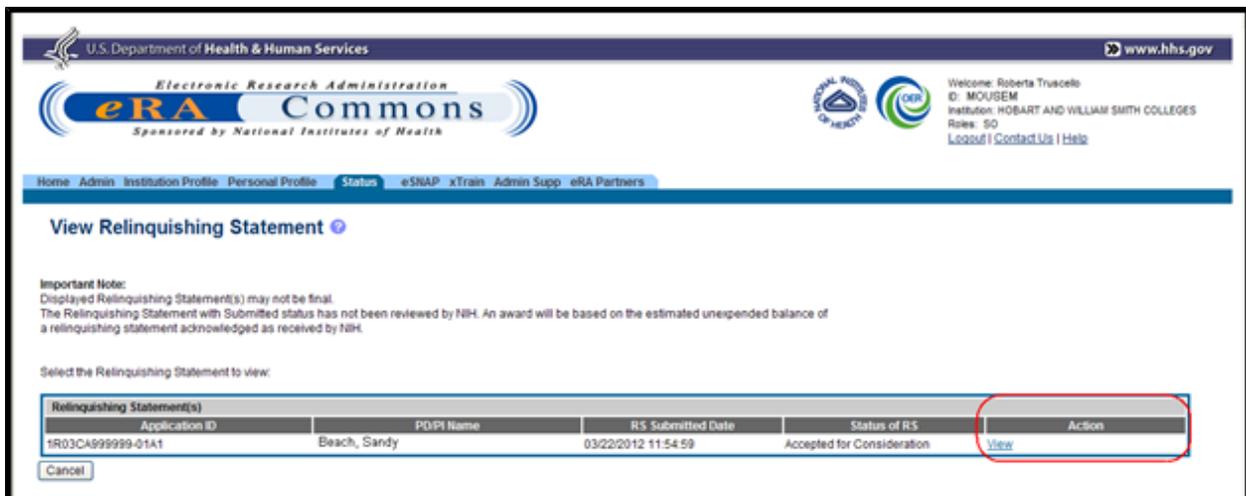


Figure 38: View Relinquishing Statement Screen

3. Click the **View** link for the appropriate RS.

The system displays the RS in PDF format in a separate window. If the PDF file does not exist, the system displays the following message: *Document Not Found*.

4. Click the **Cancel** button to return to the *Status Result – Search for Relinquishing Statements* screen.
5. Submit the application via Grants.gov using the Parent Funding Opportunity Announcement listed at http://grants.nih.gov/grants/guide/parent_announcements.htm. Please look for the NIH Guide Notice.

3.2 PD/PI Search/View Relinquishing Statement (RS)

Perform the following steps to view an RS that has been submitted to the agency.

Application ID	Grants.gov Tracking #	Proposal Title	PD/PI Name	eSubmission Status	Current Application Status	Status Date	Action
IR01MH073921-01		Sp4 pathway in hippocampus modulates sensorimotor gating	GEYER, MARK A		Application withdrawn for amendment	03/19/2005	
IR01MH074697-01		Stress and CRF system effects on information processing	GEYER, MARK A		Application withdrawn for amendment	07/14/2005	
IR01MH052885-13S2		Developmental Models of Gating Deficits in Schizophrenia	GEYER, MARK A		Awarded. Non-fellowships only	09/16/2009	
IR01MH052885-14		Developmental Models of Gating Deficits in Schizophrenia	GEYER, MARK A	Submission Complete	Awarded. Non-fellowships only	04/09/2010	
IR01MH073921-04		Sp4 pathway in hippocampus modulates sensorimotor gating	GEYER, MARK A	Submission Complete	Awarded. Non-fellowships only	01/15/2009	
IR01MH052885-13S1		Developmental Models of Gating Deficits in Schizophrenia	GEYER, MARK A		Awarded. Non-fellowships only	07/07/2009	
IR01MH052885-13		Developmental Models of Gating Deficits in Schizophrenia	GEYER, MARK A	Submission Complete	Awarded. Non-fellowships only	04/06/2009	

Figure 39: Status Result - List of Applications/Grants Screen

NOTE: If there are multiple Principal Investigators (PIs) for a grant, the letters MPI (Multiple Principal Investigator) appear to the right of the Application ID.

1. On the *Status Result – List of Applications/Grants* screen, click on the appropriate grant number link in the **Application ID** column.

The system displays the *Status Information* screen.



Figure 40: Status Information Screen Displaying the Relinquishing Statement Hyperlink

2. On the *Status Information* screen, click on the **Relinquishing Statement** link in the upper right hand corner.

The system displays the *Relinquishing Statements* screen.

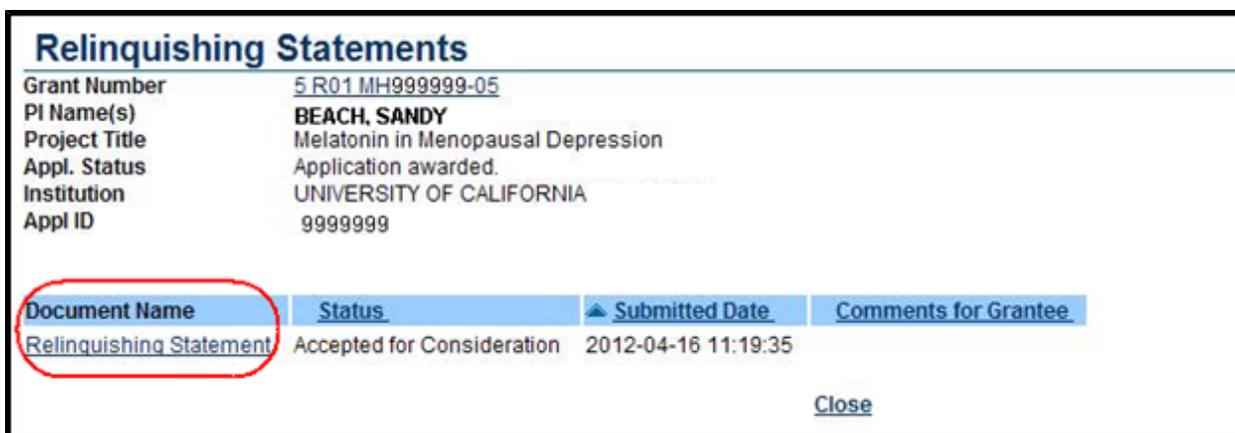


Figure 41: Relinquishing Statements Screen

3. Click the **Relinquishing Statement** hyperlink to view the Relinquishing Statement PDF.

4 eMail Notifications

4.1 eMail to the New Institution Contact eMail Provided on the RS Electronic Form

Subject: eRA Commons: Relinquishing Statement for Grant <Grant Number>Submitted

To: New institution contact email provided on the RS electronic form

eMail Content: <Do not reply warning>

A relinquishing statement for NIH Grant Number <Grant Number> has been submitted electronically through eRA Commons identifying this email address as a contact for the new institution.

You may view this relinquishing statement by going to the Change of Institution Search in Status and executing a query for the relinquishing statement.

NIH prior approval is required for the transfer of the legal and administrative responsibility for a grant-supported project or activity from one legal entity to another before the expiration of the approved project period (competitive segment). The proposed new grantee must submit a change of institution application. See the NIH Grants Policy Statement for policies regarding change of institution requests.

If your institution is not registered in the NIH eRA Commons, you will need to register in the eRA Commons and contact the eRA Help Desk for assistance in linking the relinquishing statement to your new institution account.

If you have any questions about this email, please contact the eRA Help Desk via the web at <http://ithelpdesk.nih.gov/eRA/>, by phone 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>> or the Grants Management Officer or the Grants Management Specialist identified in the Notice of Award (NoA).

Please access the NIH Commons at [URL to Commons Home Page]

4.2 Confirmation eMail to PD/PI & SO from Former Institution Acknowledging NIH Receipt of RS

TO: PD/PI, SO (who actually submitted the RS)

SUBJECT: eRA Commons: Relinquishing Statement for Grant <Grant Number> Submitted

eMail Content: <Do not reply warning>

A relinquishing statement for Grant <Grant Number> was electronically submitted to NIH and may now be viewed in the eRA Commons on the Status Information screen.

If you logged in as PD/PI, go to Status - List of Applications/Grants and select the link associated with the Grant Number.

If you logged in as SO, you can access the Status Information page by going to Status, executing a query for the grant, and selecting the link associated with the Grant Number. Also, you can view the submitted relinquishing statement through the Manage Relinquishing Statement page.

NIH must review and acknowledge the receipt of the relinquishing statement before a change of institution can be processed.

If you have any questions about this email, please contact the eRA Help Desk via the web at <http://ithelpdesk.nih.gov/eRA/>, by phone 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>> or the Grants Management Officer or the Grants Management Specialist identified in the Notice of Award (NoA).

Please access the NIH Commons at [URL to Commons Home Page]

4.3 The Relinquishing Statement (RS) Routed eMail Notification

Subject: eRA Commons: Request That You Review Relinquishing Statement for Grant <Grant Number>

To: PD/PI, SO - Individual selected by the current user as the next reviewer using the Route button

<User Last Name>, <User First Name> has completed processing the Relinquishing Statement for Grant <Grant Number>, and has forwarded it to you.

Please review the Relinquishing Statement in the NIH eRA Commons system and take the appropriate action for its eventual submission to the NIH. Please be aware that the correct new institution name and the contact email address provided on the relinquishing statement are necessary for the appropriate interactions between the awarding IC and grantee institutions involved in the process of the grant transfer.

Please use the link provided below to access the eRA Commons login screen.

The previous reviewer comments on why this action was taken are as follows: [Comments].

Footer:

If you have any questions about this email, please contact <Initiator First Name> <Initiator Last Name> at <mailto:initiator_email_addr>, who initiated this action.

If you have any questions about the change of institution request process at NIH, please contact the Grants Management Officer or the Grants Management Specialist identified in the Notice of Award (NoA).

If you have any questions about this email, please contact the eRA Help Desk at our preferred method of contact <http://ithelpdesk.nih.gov/eRA/> or call 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>>.

Please access the NIH Commons at [URL to Commons Home Page]

4.4 The Relinquishing Statement (RS) Returned eMail Notification

Subject: eRA Commons: Relinquishing Statement for Grant <Grant Number> has been Returned by NIH

To: SO (who submitted RS to the agency), Centralized institution mailbox.

Relinquishing Statement for grant <Grant Number> has been reviewed by NIH and routed back to you with the following comments: [Comments]

Footer:

If you have any questions about this email, please contact Grants Management Specialist <Initiator First Name> <Initiator Last Name> at <mailto:initiator_email_addr>, who initiated this action.

If you have any questions about this email, please contact the eRA Help Desk at our preferred method of contact <http://ithelpdesk.nih.gov/eRA/> or call 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>>.

Please access the NIH Commons at [URL to Commons Home Page]

NOTE: <initiator_email_addr> is the Employment address.

4.5 The Relinquishing Statement Acknowledged by NIH eMail Notification

Subject: NIH Automated Email: Relinquishing Statement for Grant <Grant Number> Received

To: SO (who submitted RS to agency), Centralized institution mailbox, PD/PI

NIH has acknowledged the receipt of the Relinquishing Statement for grant <Grant Number>.

Footer:

If you have any questions about this email, please contact <Initiator First Name> <Initiator Last Name> at <mailto:initiator_email_addr>, who initiated this action.

If you have any questions about the change of institution request process at NIH, please contact the Grants Management Officer or the Grants Management Specialist identified in the Notice of Award (NoA).

If you have any questions about this email, please contact the eRA Help Desk at our preferred method of contact <http://ithelpdesk.nih.gov/eRA/> or call 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>>.

Please access the NIH Commons at [URL to Commons Home Page]

4.6 eMail Acknowledging RS Now Visible to New Institution After IPF is Entered by NIH Internal User

TO: PD/PI assigned to the grant, SO who submitted the RS from the former institution, new institution contact email provided on the RS electronic form

SUBJECT: eRA Commons: Relinquishing Statement for Grant <Grant Number> is visible to the New Institution

eMail Content: <Do not reply warning>

A relinquishing statement for Grant <Grant Number> was linked to the new institution by NIH and may now be viewed in the eRA Commons by going to the Change of Institution Search in Status and executing a query for the relinquishing statement.

Footer:

If you have any questions about this email, please contact the eRA Help Desk via the web at <http://ithelpdesk.nih.gov/eRA/>, by phone 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>> or the Grants Management Officer or the Grants Management Specialist identified in the Notice of Award (NoA).

Please access the NIH Commons at [URL to Commons Home Page]

4.7 Change of Institution Time Based Reminders

4.7.1 Change of Institution Application Reminder Notice (30 Days after RS Submit Date)

Recipients: New institution contact email provided on the RS form

From: eRANotifications@mail.nih.gov

Subject: NIH Automated Email: Relinquishing Statement has been submitted XX days ago

eMail Content: <Do not reply warning>

The relinquishing statement for NIH Grant Number [GrantNumber] has been submitted electronically through eRA Commons <XX> days ago.

As the proposed new grantee, you must provide the GMO with a change of institution application prior to the anticipated start date at the new organization and preferably several months in advance. Failure to provide timely notification may result in disapproval of the request or significant delays in processing.

If you have already submitted a paper change of institution application, you may disregard this notice.

If you do not intend to submit a change of institution application, please contact the grants management officer or the grants management specialist at the awarding IC to inform them.

If you have any questions about the change of institution request process at NIH, please contact the grants management officer or the grants management specialist at the awarding IC.

If you have any questions about this email, please contact the eRA Help Desk via the web at <http://ithelpdesk.nih.gov/eRA/>, by phone 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>>.

Thank you.

4.7.2 RS Reminder Notice (30 Days after Change of Institution Application Submit Date)

Recipients: Any SO at the Former Institution (of the Parent Grant), Former Institution centralized mailbox, PD/PI on the application

From: eRANotifications@mail.nih.gov

Subject: *NIH Automated Email: Change of Institution Electronic Request has been submitted XX days ago*

eMail Content: <Do not reply warning>

The Change of Institution request for NIH Grant Number [Parent Grant Number] has been submitted electronically through Grants.gov <XX> days ago.

The request to change the grantee institution indicates that there may be a change in status of the PD/PI which requires prior approval from the NIH. Please contact the grants management officer or the grants management specialist at the awarding IC to discuss the status of the award.

If you have already submitted a relinquishing statement on paper, you may disregard this notice.

If you have any questions about this email, please contact the eRA Help Desk via the web at <http://ithelpdesk.nih.gov/eRA/>, by phone 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <<mailto:commons@od.nih.gov>>.

Thank you.

5 Error Messages

If the system may determine that an unexpected error occurred, then the following error message appears.

An unexpected error occurred. Please contact eRA Help Desk.

If the system determines that the required field information was not entered on the search screen, then the following error message is produced:

You must enter the following required fields to proceed<field>.

If the system determines that the grant being searched for is not found, then the following error message is produced:

No grants to relinquish have been found.

If the system determines that the new institution name has not been entered on the RS, then the following error message is produced:

New Institution Name is a required field.

If the system determines that the new institution's Email Address has not been completed on the RS, then the following error message is produced:

*Please enter data in the Email Address field (e.g. user_name@domain_name.com)
(ID: 30102).*

If the system determines that the Termination Date has not been completed on the RS, then the following error message is produced:

Termination Date is a required field. (ID: 200241)

If the system determines that the Termination Date is not within the current budget period on the RS, then the following error message is produced:

The requested Termination Date must be within the current budget period.

If the system determines that the Direct Cost field has not been completed on the RS, then the following error message is produced:

Direct Cost is a required field.

If the system determines that the Direct Costs of unexpended balance on the RS exceed the amount awarded for the current budget period, then the following error message is produced:

The direct costs being relinquished must not exceed the direct costs for the current budget period for transfers of active awards.

If the system determines that the Indirect Costs of unexpended balance on the RS exceed the amount awarded for the current budget period, then the following error message is produced:

The indirect costs being relinquished must not exceed the direct costs for the current budget period for transfers of active awards.

If the system determines that the total unexpended balance on the RS exceeds the amount awarded for the current budget period, then the following error message is produced:

The total costs being relinquished must not exceed the costs for the current budget period for transfers of active awards.

If the system determines that the Direct Cost, or the Indirect Cost or the Total Cost exceeds 999,999,999, then the appropriate error messages are displayed:

- *Direct Cost amount cannot exceed 999,999,999.*
- *Indirect Cost amount cannot exceed 999,999,999.*
- *Total Cost amount cannot exceed 999,999,999.*