



UNIVERSITY OF  
CALGARY

# PROJECT UPDATE REQUEST FORM

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

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**Gift / Donation Project:** Is your Project funded by a Gift / Donation (Classification Donation / Endowment Interest Income)? If **YES**, additional approval required from the Office of Development & Alumni at [giftcompliance@ucalgary.ca](mailto:giftcompliance@ucalgary.ca) (main campus) or [fdmed@ucalgary.ca](mailto:fdmed@ucalgary.ca) (Cumming School of Medicine) on Page 3.

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**External Sponsor:** Is your Project Industry / Non-Industry Sponsored (not Gift / Donation)? Has your update been approved by an external sponsor? Did the original agreement have no end dates listed in agreement (ie. clinical studies) and internal guidelines dates were setup?

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If **YES**, signatures on form not required. Include the approval from the external sponsor with the form. If original agreement had no end date, please include the agreement with the form (review will be conducted, if amendment required information provided).

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If **No**, for Industry Sponsored Research Cumming School of Medicine contact [csmllegal@ucalgary.ca](mailto:csmllegal@ucalgary.ca); all other Faculty Members please contact Research Services Legal office at [researchlegal@ucalgary.ca](mailto:researchlegal@ucalgary.ca).

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**External Awards:** Has your Project been funded by another externally restricted (Fund 60 or 70) UCalgary Project (Classification External Award)? If **YES**, additional signatures required for Extensions Only on Page 3.

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**Internally Restricted Awards:** Has your Project been funded by Operating Fund 10 or another Operating Project (OPPRJ) (Fund 05, 11, 12, 18, or 19) / Internally Restricted Net Asset Project (IRNA) (Fund 13 or 14) Classification VP Directed? If **YES**, additional signatures on Page 3 and submission of detailed financial budget (Project Budget Form) required.

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**Additional Funds with No Project Changes:** Is the Project Classification an External Award (funded by another externally restricted UCalgary Project – Fund 50, 60, or 70 or funded by Operating (Fund 10) / another Operating Project (OPPRJ) – Fund 05, 11, 12, 18, or 19 / Internally Restricted Net Asset Project (IRNA) – Fund 13 or 14)? If **YES**, please submit the [Journal Correction/Transfer Request Form](#) for additional funds from the same source where no project changes are required.

## REASON FOR CHANGE

## Justification for Extension

*Provide a clear rationale, such as significant impact on research outcomes or alignment with strategic priorities.*

## PROJECT INFORMATION

**RSO #** (if applicable)

  
  


**CSM #** (if applicable)

**RMS #** (if applicable)

**PROJECT #**

**Effective Date for Change**  
(YYYY/MM/DD)

**Reference #** (if applicable)

Project #	
Effective Date for Change (YYYY/MM/DD)	

### ADDITIONAL PROJECT UPDATES (One Up Approver for OPPRJ / IRNA; Funding Project Holder Approval for EXTRD required)

	Current	New
Fund Code		
Dept ID *		
(Additional Approvals required)		
Project Holder Change **	UCID:	UCID:
(Additional Approvals required)	Name:	Name:
Note: All existing team member delegations (eFIN, FSCM, and HCM) related to this project does not transfer, New Project Holder will need to request and authorize delegation after the Project Holder Change has been processed		
Purpose of Funds		
Project Short Description		
Note: maximum 30 characters, some short descriptions are restricted to a standard naming convention and cannot be changed		
Project Long Description		
Start Date		
(YYYY/MM/DD)		
End Date ***		
(YYYY/MM/DD)		
Note: Include Project Budget Form for all Operating Projects (Fund 05, 11, 12, 18, and 19) and extensions with additional funding		

#### INSTRUCTIONS

**End Date:** From Notice of Award / Contract / Agreement. For Externally Restricted (EXTRD) Project, if no end date specified in the agreement, the standard project end date will be five years or up to five years from the receipt of the last revenue installment; Conference / Event end date is end date of conference / event with 6 month Expiry Date (Spend Down period) when no refund / financial reporting requirement. For Operating Project (OPPRJ), end date is up to three years. For Internally Restricted Net Asset Project (IRNA), Authorization for Expenditure (AFE) is required.

### ACTIVITY CODES (Project Holder approval not required)

	Current	New
Activity Code – New and Name		Activity Code
Note: Activity Name maximum 30 characters		Activity Name
Activity Code Name Change for Activity Code _____		
Activity Code – Inactivation		

Project #	
Effective Date for Change (YYYY/MM/DD)	

## REQUIRED ATTACHMENTS

- 1) External Sponsored: Budget for all additional or reduction of funds (submit Project Budget Form if required)
- 2) Revised Notice of Award, Contract, or Agreement for all amendments (Externally Restricted Fund 60 and 70)
- 3) Email and/or Notification of Revision (Operating Project (OPPRJ) – Fund 11, 12, 18, and 19 / Internally Restricted Net Asset Project (IRNA) – Fund 13 and 14)
- 4) All requisite certifications for **Research** Projects (Fund 11, 18, and 60)
- 5) All Operating Project extensions must provide a clear rationale and attach a detailed financial budget (Fund 05, 11, 12, 18, and 19)

## REQUEST COMPLETED BY

Requestor Name

Requestor Email

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

Project Holder's Signature

Print Name

Signed Date  
(YYYY/MM/DD)

## \*\*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 Project Maintenance sends email notification upon completion of Project changes.

**Note 1:** Current Project Holder signature required under Project Holder Approval (above). If Current Project Holder is no longer at UCalgary or unable to sign, New Project Holder One Up required to sign under Project Holder Approval (above).

**Note 2:** All existing team member delegations (eFIN, FSCM, and HCM) related to this project does not transfer, New Project Holder will need to request and authorize delegation after the Project Holder Change has been processed.

New Project Holder's Signature

Print Name

Signed Date  
(YYYY/MM/DD)

Project #	
Effective Date for Change (YYYY/MM/DD)	

### \*\*\* EXTENSIONS ONLY – REVIEW AND APPROVAL SIGNATURES

**\*\*\* Note 3:** Approval by Dept Head / Dean / ADR / AVP signature is required below for Operating Project – Fund 05, 11, 12, 18, and 19 / Internally Restricted Net Asset Project (IRNA) – Fund 13 and 14 extensions. There will be a delay in processing if Operating Project (OPPRJ) / Internally Restricted Net Asset Project (IRNA) Approval is not included with this request.

**\*\*\* Note 4:** Approval by the Funding Source Project Holder / Finance Delegate is required below for extensions to projects funded by another externally restricted UCalgary Project. There will be a delay in processing if Funding Source Project Holder Approval / Office of Development & Alumni Approval is not included with this request.

**\*\*\* Note 5:** Approval by the Office of Development & Alumni is required below for extensions to projects with Project Classification Donations / Endowment Interest Income. There will be a delay in processing if Office of Development & Alumni Approval is not included with this request.

**\*\*\* Note 6:** Approval by VP and / or Provost is required for Operating Project (OPPRJ) – Fund 05, 11, 12, 18, and 19 / Internally Restricted Net Asset Project (IRNA) – Fund 13 and 14 project extensions / changes. These approvals will be facilitated by Finance and processed as required.

Dept Head / Dean / ADR / AVP Signature (One Up if same as Project Holder, see Note 3 above)	Print Name	Signed Date (YYYY/MM/DD)
Funding Project Holder (If Funded by another Externally Restricted UCalgary Project, see Note 4 above)	Print Name	Signed Date (YYYY/MM/DD)
Office of Development & Alumni (If Project Classification is Donations / Endowment Interest Income, see Note 5 above)	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 IRNA / OPPRJ EXTENSIONS AND REQUESTS 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](mailto:rsogrants@ucalgary.ca)

Gift / Donation Projects, Endowment Interest Income Projects, and Activity Code Requests to [finance@ucalgary.ca](mailto:finance@ucalgary.ca)

Operating Project (OPPRJ) – Fund 05, 11, 12, 18, and 19 / Internally Restricted Net Asset Project (IRNA) – Fund 13 and 14), and Externally Restricted (EXTRD) Non-Research Project (Fund 50 and 70) to [finance@ucalgary.ca](mailto:finance@ucalgary.ca)

External Awards (Funded by another Externally Restricted Project) to [finance@ucalgary.ca](mailto:finance@ucalgary.ca)

Industry Sponsored and Non-Industry Sponsored Projects for Cumming School of Medicine to [medoadr@ucalgary.ca](mailto:medoadr@ucalgary.ca)

Industry Sponsored Projects for Faculties other than Cumming School of Medicine to [researchlegal@ucalgary.ca](mailto:researchlegal@ucalgary.ca)

All other Externally Restricted (Fund 60) Projects to [rsogrants@ucalgary.ca](mailto:rsogrants@ucalgary.ca)

Project Update Request Form

Project #	
Effective Date for Change (YYYY/MM/DD)	

Project Update Approval			
Update Requested	Externally Restricted Projects (Fund 50, 60, and 70)	Operating Project (Fund 11, 12, 18, and 19) / Internally Restricted Net Asset Project (IRNA) (Fund 13 and 14)	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 Development & Alumni Approval Current Project Holder* New Project Holder	Office of Development & Alumni 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 / Office of Development & Alumni Approval Project Holder	Project Holder	Finance Approval – Facilitated by Finance
Purpose of Funds	Agency Approval Project Holder Dean / AVP Approval	Project Holder Provost Approval	Finance Approval – Facilitated by Finance Provost Approval – Facilitated by Finance
Sponsor – Change to Multiple Sources			Finance Approval – Facilitated by Finance
Activity Code	Not Required	Not Required	
Start Date	Agency /Office of Development & Alumni Approval Project Holder	Project Holder One Up Approval (Dept Head / Dean / ADR / AVP)	Finance Approval – Facilitated by Finance
End Date	Agency / Office of Development & Alumni Approval Project Holder	VP and / or Provost Approval Project Holder One Up Approval (Dept Head / Dean / ADR / AVP)	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